

# Making Jewish Education Work: *Complementary School Change Initiatives* *Lessons Learned from Research* *and Evaluation in the Field*





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REPORT  
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# Introduction

Nearly a decade ago, JESNA convened the Task Force on Congregational and Communal Jewish Education to respond to increasing concerns about the quality and effectiveness of part-time Jewish education in North America. The Task Force brought together leaders in the field of complementary education<sup>1</sup> to study the landscape and develop recommendations based on their findings. The resulting report, *A Vision of Excellence*, outlines challenges and presents recommendations for improving the quality of congregational/communal education.<sup>2</sup>

In subsequent years, both preceding and following the work of the Task Force, numerous change initiatives were developed and implemented to transform the field of complementary Jewish education. Change efforts in Jewish education are increasingly sophisticated, and have been mounted locally and nationally, to address persistent challenges.<sup>3</sup> In *Mapping Jewish Education: The National Picture*, the authors characterize the current state of Jewish education as a ‘field in motion’.<sup>4</sup> This new momentum contrasts with previous operating modes, which had long been static, the authors explain. Koren and Sales describe “new energy and optimism in supplementary Jewish education — new ideas, curricula, initiatives, strategies, and experimentation.”<sup>5</sup> Similarly, Jack Wertheimer describes the field as “brimming with new ideas and curricula, a raft of new initiatives, new strategies,” and notes that dozens of schools are actively engaged in a process of reinvention. Wertheimer’s interviews with 40 educators and observers reveals their collective evaluation of the field as “upbeat and cautiously optimistic.”<sup>6</sup>

Change initiatives in Jewish education have drawn heavily upon the large body of literature that is grounded in the fields of business and education. Three of the theorists who have been particularly influential are Peter Senge, John Kotter and Michael Fullan. In his 1990 book, *The Fifth Discipline*, Peter Senge, director of the Center for Organizational Learning at the MIT Sloan School of Management, introduces the notion of the *learning organization*, a dynamic system that is in a state of continuous adaptation and improvement. Senge posits that organizations must be flexible, adaptive and productive to succeed in change, and argues that in order to do so organizations must “discover how to tap people’s commitment and capacity to learn at *all* levels.” Senge identifies five basic disciplines or ‘component technologies’ that characterize learning organizations and differentiate them from more traditional organizations.<sup>7</sup> They are:

- Systems thinking
- Personal mastery
- Mental models
- Building shared vision
- Team learning

<sup>1</sup> In his work, *Recent Trends in Supplementary Jewish Education*, Jack Wertheimer notes that there is “no elegant term for the range of schools and educational programs run primarily by synagogues.” This publication refers to this form of education as “complementary schools” instead of “Hebrew,” “congregational,” or “supplementary” schools, which is consistent with the terminology adopted by the Partnership for Effective Learning and Innovative Education (PELIE).

<sup>2</sup> Paul Flexner, *A Vision for Excellence: Report of the Task Force on Congregational and Communal Jewish Education* (New York: Jewish Education Service of North America, 2000).

<sup>3</sup> Steven Kraus, “Trends in Congregational School Change Initiatives,” *Hadashot* 5, 2004, 9.

<sup>4</sup> Amy L. Sales with Marion Gribetz, Annette Koren, Joe Reimer, Nicole Samuel, Len Saxe, and Jackie Terry, *Mapping Jewish Education: A National Picture* (Boston: Fisher-Bernstein Institute for Jewish Philanthropy and Leadership, 2006).

<sup>5</sup> Annette Koren and Amy L. Sales, The RE-IMAGINE Project of New York: *Case Studies* (Waltham: Cohen Center for Modern Jewish Studies, 2006), 1.

<sup>6</sup> Jack Wertheimer, *Recent Trends in Supplementary Jewish Education* (New York: AVI CHAI Foundation, 2007), 3.

<sup>7</sup> Peter M. Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization*, A Currency paperback edition, (New York: Doubleday/Currency, 1994).

Similarly, facilitators of complementary educational change processes have benefited from John Kotter's analysis of the requisite stages for successful change. In his 1996 book, *Leading Change*, Harvard Business School professor John P. Kotter posits that an eight-stage process is needed to effect major change within an organization. Kotter's change management process, based on his study of successful and failed change initiatives, consists of the following steps:<sup>8</sup>

1. Establish a Sense of Urgency
2. Create a Guiding Coalition
3. Develop a Vision and Strategy
4. Communicate the Change Vision
5. Empower Action
6. Generate Short-Term Wins
7. Consolidate Gains and Produce More Change
8. Anchor New Approaches in the Culture

Yet another figure who has significantly influenced the course of change initiatives in Jewish education is Michael Fullan, Dean of the Ontario Institute for Studies in Education of the University of Toronto. In his article, "Three Stories of Education Reform", Fullan presents a compelling analysis of what it takes to effect deep, lasting and large-scale reform. He argues that successful change can not simply come about through "top down" or "bottom up" strategies. Rather, it requires a complex interplay between: *'the inside story'* — what we know about how schools change for the better in terms of their internal dynamics; *'the inside-outside'* story — what effective schools do as they contemplate the plethora of outside forces impinging on them; and *'the outside-in'* story — how external-to-the-school agencies organize themselves if they wish to be effective in accomplishing large-scale reform at the level of schools.<sup>9</sup>

The emergence of change initiatives in Jewish education has engendered a growing body of scholarship about those processes. In her books, *Becoming a Congregation of Learners*, and *The Self-Renewing Congregation: Organizational Strategies for Revitalizing Synagogue Life*, Isa Aron shares insights from her years of experience as the director of the Experiment in Congregational Education. Aron, together with Rob Weinberg, charts the dimensions of change as continua between discrete and systemic change, and between revising procedures and re-thinking goals.<sup>10</sup> A number of reports have explored The RE-IMAGINE Project of New York, a program of ECE (see Koren and Sales, 2006, and Cohen and Lynn-Sachs, 2005). The authors of The Lippman Kanfer Institute Working Paper, "Redesigning Jewish Education for the 21st Century," offer a set of "design principles" for Jewish education and propose a multi-step strategy to transform Jewish education.<sup>11</sup> Jack Wertheimer's 2007 report, *Recent Trends in Supplementary Jewish Education*, assesses the current state of the field and offers strategies for change.<sup>12</sup>

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<sup>8</sup> John Kotter, *Leading Change* (Cambridge: Harvard Business School Press, 1996).

<sup>9</sup> Michael Fullan, "Three Stories of Education Reform," *Phi Delta Kappan*, 81.7, April 2000, 581–584, 1–23.

<sup>10</sup> Isa Aron and Rob Weinberg, "Learning as a Portal for Synagogue Revitalization," *Jewish Education News*, Winter 2002, 23.1, 21–23.

<sup>11</sup> Jonathan Woocher, Renee Rubin Ross, and Meredith Woocher, *Redesigning Jewish Education for the 21st Century* (New York: The Lippman Kanfer Institute, 2007).

<sup>12</sup> Jack Wertheimer, *Recent Trends in Supplementary Jewish Education* (New York: AVI CHAI Foundation, 2007).



# JESNA's Report on Complementary School Change Initiatives

The aim of this report is to add to the conversation by identifying lessons learned from Berman Center evaluations of community/congregational school change efforts. By offering a synthesis of lessons learned from across the following 10 complementary school initiatives, this report aims to be both a product of, and an advocate for, collaborative change efforts:<sup>13</sup>

- Building Leadership Capacity for Educational Excellence & Congregational Transformation
- Center for Excellence in Jewish Teaching (CEJT)
- CHAI Curriculum Initiative
- Jewish Educator Corps Program (JEC)
- La'atid: Synagogues for the Future
- Leadership Institute for Congregational School Principals
- Mashkon Pilot Projects
- NESS: Nurturing Excellence in Synagogue Schools
- The Moreshet Initiative
- Project Curriculum Renewal (PCR)

Some of the initiatives are currently in transition, while others are ongoing.<sup>14</sup>

To evaluate these initiatives, Berman Center research associates employed a variety of qualitative and quantitative methods. Evaluations were both formative and summative. Some evaluations provided 'early snapshots' at the beginning of the planning phase of initiatives. Some were longitudinal in scope. One evaluation was designed to examine the short and long-term impacts of a curriculum initiative. The Berman Center was hired by another initiative to provide an objective external assessment of one project's success in achieving its over-arching goals, to offer recommendations regarding future directions and steps, and to place findings in the broader context of other synagogue change projects currently underway in North America.

Lessons learned from across the 10 initiatives form the basis of this report. It should be noted that each 'learning' discussed in this report has empirical support from two or more Berman Center evaluations. The lessons from Berman Center evaluations are contextualized and extended with insights from the field of secular education. Significantly, we learned that lessons derived and disseminated from complementary school change initiatives are supported by scholarship from the broader field of educational reform and organizational change models originating from the business sector. The processes of school change in Jewish educational settings both reflect and support experiences in the field at large.



**“Significantly, we learned that lessons derived and disseminated from complementary school change initiatives are supported by scholarship from the broader field of educational reform and organizational change models originating from the business sector.”**

<sup>13</sup> Appendix A: About the Evaluations provides background information about each of these efforts, and describes the main goals and methodological approaches of each evaluation.

<sup>14</sup> The Center for Excellence in Jewish Teaching (CEJT), Jewish Educator Corps Program (JEC), and the Mashkon Pilot Projects are each in a process of transition. The other seven initiatives are ongoing.

This report is not about the *impact* of initiatives, but about each initiative's *process*. It is not intended to be an exhaustive guidebook about complementary school change, but rather to capture what has been learned from a range of change initiatives evaluated by the Berman Center, and to identify general 'learnings' — considerations to be made when engaging in this work.

There are, of course, additional lessons to be learned from the many other extant change efforts, which are beyond the scope of this report. For example, none of the evaluations focused on assessing students' perceptions of the impact of change processes; hence students' perspectives are not included, nor are any evaluations focused on family education. In-depth and detailed descriptions of each change effort's challenges and successes are not presented here. Instead, this report is an effort to share broad lessons about the process of complementary school change that were gleaned from evaluations conducted by the Berman Center. In *What We Know About Jewish Education*, Steven Kraus asserts: "It is crucial that all national and local institutions work together in sharing of information, piloting of new projects and collaborating on research."<sup>15</sup> It is in this spirit that we offer this report.

*NOTE: This report includes quotations, for illustrative purposes, from participants in the complementary school change initiatives evaluated by the Berman Center, and by the Berman Center evaluators themselves. In order to retain the anonymity of the people and the change initiatives, the quotes are not attributed in any way.*

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<sup>15</sup> Steven Kraus, "What We Know About Jewish Education — Congregational Education," in *What We NOW Know About Jewish Education*, Paul Flexner, Roberta Louis Goodman, and Linda Dale Bloomberg, eds. (Los Angeles: TorahAura Productions, forthcoming).

# Key Learnings

This report explores five critical aspects of Complementary School Change Initiatives, including:

- approaching change systemically,
- utilizing curricula,
- building consensus among key stakeholders and fostering internal and external collaborations, and
- the role of professional development.



## Approaching Change Systemically

Numerous local and national initiatives have been launched to change complementary schools.<sup>16</sup> Change efforts are focused on schools, congregations, local communities and national networks. Some efforts have been operating for over a decade while others are currently in the pilot phase. Initiatives are both denominationally based and cross-denominational. Educators in all career stages — from pre-service teachers to veterans — have participated in change processes.

These efforts apply various approaches and foci to the change process. Some emphasize visioning and goal setting, and some focus on curricular reform. Professional and lay leadership development is the foundation of some efforts, while others concentrate on changing the environment: the culture of schools and synagogues. **The various approaches to change typically have multiple dimensions.** For example, many of the curricular interventions also include a professional development component. Likewise, the lay leadership development oriented initiatives often incorporate training and enrichment for professionals. **The initiatives that are characterized as systemic approaches to change encompass many dimensions: vision and goal setting, content and method, personnel/professional development and culture of change, and have a greater chance for sustained impact.**

The Berman Center evaluations of such initiatives revealed the powerful impact of systemic change processes. The evaluations provided strong evidence that these change initiatives are highly effective, particularly with regard to achieving the goals of developing professional and lay leaders' skills and effectiveness, increasing the effectiveness of classroom teachers, and enhancing students' experiences in the classroom. Feedback provided by key stakeholders (including staff, synagogue lay and professional leaders, teachers and students) across evaluations, identified factors (in addition to the systemic nature of the change initiative) that contributed to the success of the programs. Such factors included: sustained effort over time; expert staffing; excellent communication among staff and with the schools; responsiveness to the individual needs and characteristics of each of the participating schools; and high quality frameworks of professional development based on research, theory, and practice. Lay and professional leaders indicated that while “the whole was greater than the sum of the parts” in the systemic approach, each of the components contributed to the schools' overall progress and achievement.

**“The initiatives that are characterized as systemic approaches to change encompass many dimensions: vision and goal setting, content and method, personnel/professional development and culture of change, and have a greater chance for sustained impact.”**

<sup>16</sup> A list of complementary school change initiatives compiled by the Center for Excellence in Congregational Education, can be found at: <http://secure.jesna.org/j/pdfs/synagoguechangeinitiative.pdf>

Systemic interventions markedly increased enthusiasm, energy and pride among lay leaders and professionals. Regular attendance, willingness to assume volunteer responsibilities, and perseverance with the extended process were indicators of lay leaders' investment. Additionally, the initiatives became catalysts for congregations to create structures for broader decision-making. The changes and collaborative processes introduced have been incorporated into the cultures of the congregations, and their methods of operation.

## Utilizing Curricula

A number of the evaluated initiatives focused on content and method: what is being taught (curricula) and how (pedagogy) to produce educational change. Initiatives that employed curricular reform as a lever for change were often designed to have a broad impact on individuals, educational organizations, and the community at-large through advocacy, community organization, and educator development in addition to the specific changes in educational content and methodology. Curricular interventions were most likely to be successful when they included multiple components. For example, one curricular program included teacher recruitment and training, enhancement of curriculum and materials, training and supervision of coaches who support the novice teachers, teacher education about the latest theories of teaching, and advocacy for the reformulation and reprioritization of educational goals — clearly, a systemic approach which used curricula as the 'anchor'.

Curricular interventions affected both the content of learning and teaching style. The introduction of more student-centered, active forms of learning was positively received. Across programs evaluated, many teachers, educators and parents described the positive impact they saw on students.<sup>17</sup> Teachers from one evaluation said they were more likely to present information directly, use group projects, role-playing, skits, reading and worksheets since adopting the curriculum.

As a result of curricular interventions, teachers provided more challenging and thought-provoking lessons that were more structured, better prepared and well organized. Additionally, teachers paid greater attention to individual students' needs and were more focused on students' accountability. An educational director asserted:

*Re-vamping the congregation's educational program has had an enormous impact on the school faculty... The adoption of a congregation-wide curricular focus and new format has demanded that faculty members work together to generate ideas, share resources, and develop new teaching strategies aligned with their goals and approach.*

Berman Center evaluators observed that implementing new curricula necessitated that teachers develop new skills and take on new and different roles. Findings from evaluations showed that teachers who received formal training and support tended to be more comfortable and conversant with new curricular approaches, and more positive about their experiences. Most of the initiatives evaluated include learning opportunities for teachers, such as skill acquisition, knowledge building, and networking. Sales, et. al., note that at the national level, opportunities for professional development are implicitly included in efforts focused on the

<sup>17</sup> Because of the formative nature of the curricular initiative evaluations, the impact on students was based on parents', teachers', and educational leaders' observations. As the curricular initiatives unfold, the development of comprehensive assessment tools will be invaluable to measure the full impact on students.

development of new curricula and new models for congregational education. They assert: “learning to teach new curricula can be an effective form of professional development for teachers, particularly if the curriculum entails new ways of thinking about teaching and learning ...it can be an opportunity for teachers to gain knowledge and to enhance their pedagogical skills.”<sup>18</sup>

There was a wide variation across congregations in the amount and intensity of training for implementing various curricula. Evaluated schools offered various types of training through workshops, seminars, and retreats, and provided materials for self-guided instruction (e.g., DVD tutorials and teachers’ guides). Some initiatives provided onsite training; others sent staff to off-site training sessions. In one evaluated initiative, each school received direct guidance from curriculum consultants. Yet another initiative offered a curriculum practicum, a sequence of three graduate level courses taught by the program director, with credit granted by a local college of Judaic studies. In schools where no formal teacher training was provided, teachers experienced serious challenges in implementing the curriculum. Teachers’ informal training included: meeting with the schools’ education directors, accessing a related website, getting advice from the regional educator or guidance from other teachers who had experience with the curriculum.

Evaluations showed that for a curriculum to be utilized most effectively, it should be accessible to teachers of all levels of knowledge and experience, and relevant to students’ lives. A tension emerged between some teachers’ desire for standardized, fixed curriculum and others’ preference to work with curricula that are adaptable and fluid. The curricula evaluated were designed with varying degrees of malleability. The flexibility of one of the curricula evaluated enabled schools to make adjustments and changes to the program to meet the needs of teachers and students. However, flexibility was seen as an impediment in some cases. At one school, teachers found it difficult to manage that aspect of the curriculum which allows and encourages them to decide which activities to use. When asked how they would improve lesson plans, some teachers requested lessons that require less individual preparation by teachers. Many of the teachers from one evaluation expected that all of the materials would be presented in the curriculum guide, ready for use in the classroom.

On the other hand, another curricular initiative was not adaptable enough for some. Teachers from several schools implementing that program indicated their frustration with the rigid approach to implementing curriculum exactly as written. Teachers expressed a desire to bring their own knowledge and experience in education into their implementation and believed students would benefit from this approach as well.

Building on the importance of achieving consensus among key stakeholders (discussed later in this report), Berman Center evaluators found that a major challenge to implementation of curriculum was lack of buy-in from those stakeholders. At some schools, leaders were not fully bought into the curricular activity of teachers. Teachers who participated in seminars or training sessions outside of their schools described how they returned with new perspectives that their colleagues did not necessarily share. A respondent explained:



“Evaluations showed that for a curriculum to be utilized most effectively, it should be accessible to teachers of all levels of knowledge and experience, and relevant to students’ lives.”

<sup>18</sup> Amy L. Sales with Marion Gribetz, Annette Koren, Joe Reimer, Nicole Samuel, Len Saxe, and Jackie Terry, *Mapping Jewish Education: A National Picture* (Boston: Fisher-Bernstein Institute for Jewish Philanthropy and Leadership, 2006), 26.

*The challenge is that I went through the training process as a willing participant. I acquired the language ...I've been sold. But when I got back to my synagogue all excited about what I've learned, the clergy and the lay people were not where I am. They haven't been sold yet.*

When key stakeholders have bought in, curricular interventions lead to observable changes in the quality of education. The majority of key informants across evaluations (who were both lay and professional leaders) felt the curriculum, and the process of its implementation, had a profound impact on teachers. Evaluations showed the positive impact of curriculum initiatives on teachers' knowledge and teaching styles. Teachers demonstrated greater enthusiasm and were generally challenged in their own thinking and had a better understanding of the material they taught. They acquired tools to do a better job, and were therefore more comfortable and less self-conscious. The education director at one synagogue felt that the process of implementation made the staff more sophisticated about how they think about children and children's learning.

At the same time, through limited longitudinal analysis, Berman Center evaluators found that teachers' attitudes about curricula can evolve over time. For example, immediately following the curricular intervention, program staff at one school perceived that the key impacts on the school included a cultural shift to a more community-like atmosphere. A mid-year evaluation of the same school revealed teachers' mixed reactions to the curriculum. Change facilitators noted teachers' frustration about the amount of financial compensation they received relative to the extra time they had to devote to implementation of the curriculum. As explained in EJSS (The Educators in Jewish Schools Study), this expectation is justified.<sup>19,20</sup>

At a school where teachers and educators favor more traditional educational methods (which include teaching a broad range of content information and using a textbook approach), respondents reported less success with the curriculum. They felt that there was little or no mastery of material, that vocabulary was not being absorbed, and they questioned how much content was being learned.

Berman Center evaluators observed a 'halo effect' operating among respondents in one study: those who were generally positive about the curriculum reported more positive student attitudes than those who had reservations about the program. Parents, teachers, educators, rabbis and education committee chairs who favored the approach described students' increased involvement in the learning process, their ability to connect with the curriculum, and reduced complaining. "Students like the creativity of the projects, talking, working individually... it has affected their attitudes positively," one respondent reported. Another observed that students complain less. Still another asserted: "[students] really like coming to religious school... they are always ready and interested in the opening activity." Respondents from schools in one evaluation observed that parents' satisfaction with the curriculum was high. "Parents like it because the kids do," one person commented.

Berman Center evaluators found that the introduction of new curricula often has a broad impact. Principals interviewed for one evaluation noted a 'ripple effect.' A number of schools made substantive and, in some cases, significant school-wide curricular changes. The curriculum influenced the selection and use of educational materials by teachers and schools. This included adopting new texts that were

<sup>19</sup> EJSS findings suggest that there is both a significant need and a significant opportunity for the Jewish education community to deepen, intensify, and connect to professional development in a more meaningful and ongoing way, including insuring that professional development is provided and/or paid for by their school.

<sup>20</sup> *Educators in Jewish Schools Study (EJSS)* (New York: JESNA's Publication and Dissemination Project: An Initiative of JESNA's Learnings and Consultation Center in Partnership with JESNA's Berman Center for Research and Evaluation in Jewish Education, 2008), 41.

consistent with their new goals and approaches, based on recommendations from the curriculum initiative's faculty and consultants. The education director at one school that implemented a Hebrew curriculum believed that one unanticipated outcome of the success of the program was an increased desire for adult Hebrew classes. She thought it was inspirational for parents to see their children learning Hebrew.

**The efficacy of curricular reform is dependent on ongoing support.** A program staff person of one initiative underscored the need for ongoing support with this comment: “teachers require a lot of constant and ongoing support for that change in thinking and behavior to occur... not every teacher is receptive to the coaching or to changing lesson plans.” One initiative provided ongoing support through onsite consultations with the education director and with in-class coaching to help teachers effectively implement the new curriculum and related materials.

**Evaluation findings also revealed the need for peer support.** Teachers benefitted from learning how teachers in other schools utilized the curriculum.

## Building Consensus Among Key Stakeholders and Fostering Internal and External Collaborations

**In many of the initiatives evaluated, lay leaders were guided through visioning processes, community building efforts, and increasing collaboration with professionals. This proved to be an essential first step in the change process.** Steven Kraus made the following observation about a number of change initiatives: “only after there was significant buy-in from the leadership did the program[s] actually begin.”<sup>21</sup>

In one initiative evaluated, each congregation convened parlor meetings to engage its entire congregational community in the visioning process. They emphasized the importance of buy-in from all those touched by the program — educators, education directors, rabbis, cantors, b'nai mitzvah trainers, parents and students — to assure that everyone was on board for a renewal or change. The parlor meetings provided congregants with opportunities to be part of the collaborative effort.

**In some cases, key stakeholders' buy-in was hindered by insufficient dissemination of information.** For example, the decision to adopt curricula was sometimes made without input from all stakeholders. In the case of one change initiative operating in 10 congregations, educators in 6 of the congregations (in most cases in consultation with the rabbis) made the decision to adopt new curricula independent of their respective education committees. In another evaluation, educators at one synagogue introduced the curriculum to the vice president of education, but not to the full committee. In many cases, the educator announced the adoption of the curriculum as a *pro forma* report. According to a committee member in another school, insufficient communication prevented teachers' buy-in.

Upon reflection, synagogue professionals across evaluations recognized the need to proactively cultivate buy-in. In retrospect, representatives of several congregations indicated that it would have been beneficial to orient the various stakeholder groups (especially faculty, educational committee members and parents) prior to implementation of the change initiative.

<sup>21</sup> Steven Kraus, “Trends in Congregational School Change Initiatives,” *Hadashot* 5, 2004, 6.

Respondents from congregations that successfully cultivated key stakeholders' buy-in reported many benefits, including: lay leaders' greater understanding of the educational issues facing their schools, increased familiarity with their school's program, and greater support for financial implications. Lay leadership became more effective in performing their roles within the education committee and in the broader congregational context. In their assessment of The RE-IMAGINE Project of New York, Steven M. Cohen and Michelle Lynn-Sachs found that another result of the intervention was congregations' "more cohesive leadership dedicated to educational change."<sup>22</sup>

Opportunities for professionals and lay leaders to learn together proved to be particularly beneficial to the visioning and community building processes. In *Redesigning Jewish Education for the 21st Century*, authors note the importance of collaborative educational processes. They write: "Jewish education must create opportunities for active learners to engage with others, to become immersed in social contexts where they can experience personal meaning in and through connectedness and community."<sup>23</sup>

Central to the change process of one evaluated initiative was the development of courses, workshops, and conferences to provide a structured mechanism for learning from national and local experts and to bring new models and ideas to synagogue participants for stimulating onsite reform. Participating as teams in semi-annual retreats and formal courses, professional and lay leaders were introduced to new ideas and research in areas such as synagogue change, leadership development, Torah study, Jewish family education and prayer. Several noted that their involvement in the initiative led them to attend and participate in Jewish educational and cultural programs that they would not have previously considered.

Initiatives evaluated by the Berman Center found that another key component of generating buy-in and building successful coalitions is open communication between lay people and professionals. Frequent, ongoing and open communication not only ensured smooth functioning of initiatives, but in many cases, also allowed for and facilitated mid-course corrections to address emergent challenges. In one evaluation, Berman Center evaluators wrote: "The importance of two-way communication and accessibility between program staff and congregational leadership cannot be exaggerated."

The amount and quality of communication between the facilitators of change initiatives ('change agents') and participants in the processes was of paramount importance. Conversely, on occasions when communication gaps occurred, or congregational leaders felt that facilitators were unresponsive to their unique needs and characteristics, dissatisfaction with the process and lack of progress ensued. In the words of a committee member: "It is impossible to overdo communication."

Multiple forms of communication are necessary to facilitate change processes. Clear and concise written materials, presentations, interpersonal dialogue, and sample experiences are needed to ensure effective communication, both within a committee and with the rest of the congregation. Checking in before meetings, debriefing after meetings, regular e-mails, and clear explanatory documents help to keep committee members apprised, and to advance the process.

<sup>22</sup> Steven M. Cohen and Michelle Lynn-Sachs, *The RE-IMAGINE Project of New York: Assessing a Collaborative Intervention in Five Congregations* (New York: The Commission on Jewish Identity and Renewal, The UJA-Federation of New York, 2005), 4.

<sup>23</sup> Jonathan Woocher, Renee Rubin Ross, and Meredith Woocher, *Redesigning Jewish Education for the 21st Century* (New York: The Lippman Kanfer Institute, 2007), 3.



Findings indicate the importance of open and transparent communication processes, in which information is equally accessible to all committee members. Communication that is two-way (i.e., not merely informational but also designed to elicit feedback) is particularly well received — but only when it is apparent that the input is actually considered and/or utilized. There should be an open flow of information that is not inundating or burdensome. Evaluations found that lack of communication and information results in misapprehension and negative feelings related to being ‘outside the process.’

Collaboration is both a process and an outcome in the work of organizational change.

When transforming the environment of synagogue schools, initiatives began by creating a sense of collectivity among volunteer and professional leaders. Margaret Wheatley, a leading expert on organizational change and development asserts: “People support what they help to create.”<sup>24</sup> Senge punctuates this point when he writes: “When people truly share a vision they are connected, bound together by a common aspiration.”<sup>25</sup>

In the initiatives evaluated, relationship building is essential to the change process. Isa Aron, in her book, *Becoming a Congregation of Learners*, writes about the transformative nature of the collaborative process: when lay and professional leaders reflect on current realities, envision the future, and strategize about how to effect change, they become highly invested in the process and voluntarily take on the role of change agent.<sup>26</sup> A shared purpose and collaborative planning process not only contribute to a sense of collective responsibility and focus but also can provide expanded opportunities for sharing information, technical expertise, and reflective dialogue as well as social-emotional support for participants during the disequilibrium inherent in any change process.<sup>27</sup>

Evaluation findings revealed that cultivating a shared vision is a key factor contributing to the successful implementation of change processes. One initiative was designed to integrate the school into the overall functioning of the synagogue community by involving the entire synagogue community — the rabbi, cantor, education committee, synagogue board, students, and parents — in the process of improving the quality of Jewish education in their school. The initiative provided formal training to lay and professional leaders to equip them with the skills necessary to work cooperatively and effectively.

The creation of a sense of collectivity among volunteer and professional leaders was a key function of some initiatives. One initiative required participating schools to organize a new committee of lay leaders representing a cross section of synagogue members to assist professional leadership in moving towards change. The first year of a curricular initiative focused on helping the schools’ key stakeholders (professional and lay leaders, along with educators) create a unified philosophical foundation for their education program. Change initiative facilitators purposefully designed the committee experiences and activities to foster community building. By all accounts, participation was a positive and powerful experience in and of itself for committee members, who unanimously indicated that the experience generated a sense of a ‘community within community,’ while simultaneously strengthening their commitment to the congregation as a whole.



“Evaluation findings revealed that cultivating a shared vision is a key factor contributing to the successful implementation of change processes.”

<sup>24</sup> Margaret Wheatley, “Innovation Means Relying on Everyone’s Creativity,” *Leader to Leader* Spring 2001, 20, 5.

<sup>25</sup> Peter M. Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization*, A Currency paperback edition, (New York: Doubleday/Currency, 1994), 192.

<sup>26</sup> Isa Aron, *Becoming a Congregation of Learners: Learning as a Key to Revitalizing Congregational Life*, (Woodstock, VT: Jewish Lights Publishing, 2000), 81-82.

<sup>27</sup> Michael Fullan, “The Return of Large-Scale Reform,” *Journal of Educational Reform*, 1, 2000, 1-23.

In many cases, lay and professional committee members noted that the new collaborative approach was a marked departure from previous practices. Respondents indicated that congregants had rarely, if ever, been included in setting congregational directions related to education. Several school leaders participating in another initiative acknowledged that prior to their involvement in the change process, their education committees were *ad hoc* in nature: many only involved a small number of lay leaders who had limited interaction with professional staff.

Across initiatives, Berman Center evaluators observed that leadership emerged from the group processes, and that the process was unifying for staff. Similarly, in their assessment of The RE-IMAGINE Project of New York, Steven M. Cohen and Michelle Lynn-Sachs found that one result of the intervention was congregations' "more cohesive leadership dedicated to educational change."<sup>28</sup>

**Cultivating a collaborative environment was an effective way to recruit and re-energize laypeople.** A respondent from one evaluation noted that she had no plans to become a lay leader and yet, with each class on synagogue change and leadership development, she became more invested. She indicated that the courses provided her with ideas and strategies for synagogue revitalization, and she eventually became a co-chair of the change committee. Committee members in a number of initiatives have gone on to become congregational officers and committee chairs, and Jewish communal leaders. **As a result of their involvement in planning and implementing programs, lay leaders felt a greater commitment to attending programs, bringing their friends, and ensuring that programs succeeded.** One respondent compared the process to "a positive pyramid scheme." He said, "You have an investment in this, so you become really committed to seeing that it succeeds — and you feel a much greater sense of pride when it does." As Fullan<sup>29</sup> and Senge<sup>30</sup> suggest, collaboration and shared leadership emerge as both a means to an end, and an end in itself.

**Evaluation findings illustrated that the effective fostering of a collaborative environment within a synagogue is dependent on the support of the rabbi.** The experiences of three schools involved in a curricular initiative illustrate this point. At one school, the rabbi and the education director were involved in the decision to adopt the curriculum, and remained involved and committed to it. At the second school, a team, which included the rabbi, was created, and that team developed and implemented the program. At the third school, the rabbi unilaterally made the decision to adopt the curriculum, resulting in lack of buy-in from other key stakeholders. The role of the rabbi in a complementary school change initiative cannot be overstated. S/he is seen and serves as the lead professional of the congregation. Without his/her active participation, engagement, buy-in and collaboration in the change initiative, its success will be greatly impeded.

Annette Koren and Amy Sales' case studies of congregations participating in The RE-IMAGINE Project of New York demonstrated the critical role played by leadership. **The authors concluded that major change in education could not occur without clergy's active support.**<sup>31</sup> In another study, interviews with 12 directors of congregational schools revealed that involvement of rabbinical staff was considered essential to programmatic success.<sup>32</sup>

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<sup>28</sup> Steven M. Cohen and Michelle Lynn-Sachs, *The RE-IMAGINE Project of New York: Assessing a Collaborative Intervention in Five Congregations* (New York: The Commission on Jewish Identity and Renewal, The UJA-Federation of New York, 2005), 4.

<sup>29</sup> Michael Fullan, "The Return of Large-Scale Reform," *Journal of Educational Reform*, 1, 2000, 1-23.

<sup>30</sup> Peter M. Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization*, A Currency paperback edition, (New York: Doubleday/Currency, 1994).

<sup>31</sup> Annette Koren and Amy L. Sales, *The RE-IMAGINE Project of New York: Case Studies* (Waltham: Cohen Center for Modern Jewish Studies, 2006), 34.

<sup>32</sup> Lauren Raff, "Challenges and Strategies: Notes for the 'Front Lines' of Congregational Education," (New York: Think Tank for JESNA's Center for Excellence in Congregational Education, 2003).

The effectiveness of the change is also dependent on the presence of a ‘change agent’, a person charged with the responsibility of facilitating and overseeing the progress of the effort. Change agents are catalysts for change, and can be internal or external to the organization/program. (When external, they are often referred to as ‘consultants’ or ‘facilitators’. As explained below, these roles are often best filled by such people.) Change agents are motivated and able to facilitate transformation over time. In *The Fifth Discipline*, Peter Senge describes a model of systemic change that encourages individuals in organizations to examine, isolate, and correct the causes of recurrent patterns.<sup>33</sup> The external change agents’ outsider perspective makes this process possible. A rabbi from one evaluation explained: “We had to think through things with outside eyes and outside brainpower. They brought a perspective to help us reflect on managing change.”

In the initiatives evaluated, change agents took on various roles. They built bridges between people and organizations, provided technical and emotional support, and facilitated visioning. They provided guidance, helping congregations stay attuned to the diverse needs within their communities. **Change agents contributed both to process facilitation and also to knowledge building. They brought assets and skills that complemented the resources available within the congregation.** They kept the big picture in mind as they helped congregations manage the change process.<sup>34</sup>

Some individuals interviewed compared the role of the onsite facilitator to ‘coach’ or ‘personal trainer,’ while others described them as ‘informed outsiders,’ ‘advisors,’ ‘counselors,’ and ‘cheerleaders.’ At one school, individuals interviewed perceived the change agent primarily as an observer who tried to limit his/her intervention in the process to times when it was necessary and/or constructive. In other initiatives, consultants were sources of ideas, acted as ‘nudges,’ assisted as problem solvers, listened, and kept the collaborative groups on track to achieve their goals.

Change agents are sometimes recruiters, helping synagogue leaders to connect new people to projects that fit their specific interests and engaging people through courses and conferences to support their volunteer efforts. They contend with the ongoing challenge of integrating and acculturating new leaders.

**In some cases, change agents are mediators in times of conflict.** The staff of change initiatives helps to analyze situations and serve as a mirror, guiding synagogue leadership to look directly at tough issues and reflect upon possible compromises and solutions. In one congregation, when there was tension with the transition to a new rabbi, private meetings were held with the program staff, key professionals and lay leaders. **The change agent’s role in helping leadership express their concerns and work through turf issues was critical to assisting the congregation in building a collaborative, creative community.** In another congregation, issues surrounding synagogue/school curriculum and restructuring became divisive. In that case, initiative consultants helped synagogue leaders to focus on areas of consensus that were emphasized in the visioning process.

**There was a high degree of consensus among participants in the change initiatives which were evaluated that outside consultants were essential to the success of the process.** Change agents typically attended all of the meetings at their sites, kept the

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<sup>33</sup> Peter M. Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization*, A Currency paperback edition, (New York: Doubleday/Currency, 1994).

<sup>34</sup> Michael Fullan and Matthew B. Miles, “Getting Reform Right: What Works and What Doesn’t,” *Phi Delta Kappan*, 74, 1992, 745-752.

committees focused, reminded participants about key principles and practices necessary for successful change to take place, helped them access information and resources, and served as their constant and immediate guides and mentors.

Berman Center evaluators emphasize the importance of facilitators who possess multifaceted skill sets including: high-level knowledge and expertise in education and/or organizational development, familiarity with and expertise in settings of complementary schools (e.g., congregations), and highly developed consulting and coaching skills.

Berman Center evaluators found that change agents' knowledge of particular congregations and the field of Jewish education increased their authority and credibility. Across evaluations, respondents valued the change agents' 'insider information' about congregations and their history, as well as their ability to provide relevant and specialized advice, guidance, feedback and reflection. Their understanding of the unique characteristics and needs of the population contributed to change agents' ability to absorb and engage with current relevant ideas and knowledge from the fields of Jewish and general education. In one evaluation, the strong backgrounds of these consultants, who were academics in Jewish education, and communication, and organizational change, provided necessary expertise. Berman Center evaluators noted positive outcomes when change agents introduced innovative ideas and provided research information in order to "prime the pump" and spur new ways of thinking.<sup>35</sup>

Successful change processes leave congregations able to build on the achieved momentum, and continue the process once the initial intense period of the initiatives ended. Change agents work to 'wean' congregations from dependence on their full support. In one program, weekly conversations with the Education Director and regular meetings with consultants provided a 'scaffolded' structure on the community level to support the congregations' specific needs as well as to assist them in building capacity for creative change.<sup>36</sup>

'Weaning' the congregations to a structure of less support time by onsite consultants was gradual and, at times difficult. Finding the balance of support versus independence proved to be an ongoing challenge. Consultants reduced time at meetings but continued to provide assistance when difficult issues and tensions arose. They continued to serve as the 'nudges' aiding in linking multiple change projects, keeping everyone informed and on-board as well as reminding members about ongoing assessment.

In some cases, school leaders indicated their sense that the initiative ended too abruptly. Teachers felt 'left' when the program concluded. Teachers and education directors would have liked more opportunities for program staff to provide ongoing support and maintenance for the new curriculum and teaching approaches. A teacher commented: "When they were done, they said if there was anything you need, call us. It didn't feel like the relationship was ongoing. It was a year of handholding and then we were on our own. We could have used more of a weaning period."

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<sup>35</sup> Michael Fullan, "The Return of Large-Scale Reform," *Journal of Educational Reform*, 1, 2000, 1-23.

<sup>36</sup> Michael Fullan, "The Return of Large-Scale Reform," *Journal of Educational Reform*, 1, 2000, 1-23.

Program staff members from one initiative acknowledged that ongoing maintenance is essential for cultural change to occur, but they did not have sufficient staff resources to

address ongoing intensive involvement beyond the initial implementation period. Without continued support, there is potential for the change process to end or even regress.<sup>37</sup>

## The Role of Professional Development

As a result of professional development opportunities, teachers<sup>38</sup> were more innovative and showed evidence of improved content knowledge and pedagogical skills. Changes in educational foci and approaches — including inter-generational formats, greater emphasis on experiential learning, and curricular changes including thematic approaches — were accompanied by the intensification and systematization of professional development and training for teachers. Professional development programs exposed participants to new ideas, resources, strategies and theoretical frameworks through symposia, seminars and materials. Teachers and education directors taking part in change processes felt that they benefited from the training because it provided new information or reinforced and validated what they already knew and were already practicing in their classrooms.

Programs provided valued support for problem-solving and reflective practice through mentorship. Participants in one initiative felt that they benefited from the problem-solving support they received, particularly through the mentorships and to an additional extent, through their peer network. Both participants and mentors reported that participants' professional skills and knowledge were enhanced, particularly with regard to reflective practice, improving communication skills, articulating Jewish educational vision and engaging in collaborative decision-making.

As discussed above with regard to curricular interventions, professional development helped teachers change the methodologies they employed in the classroom, utilizing multiple modalities, replacing frontal teaching with facilitation of student discovery learning, and incorporating brain-based techniques such as group learning activities. Additionally, teachers learned the importance of being attuned to the needs of individual students, constantly assessing student learning, and creating a positive classroom culture. Participation helped teachers to become familiar with a variety of state-of-the-art resources, approaches and techniques and to learn from master teachers.

Professional development was credited with increasing participants' knowledge, love and appreciation for Judaism, Jewish values and the Hebrew language. Participation in professional development opportunities motivated some teachers to continue their own Jewish education and pedagogic training after completion of the program.

Some professional development programs were open to diverse populations of individuals who had different knowledge and experience bases, as well as differing professional needs. Novice and veteran teachers with varied Judaic backgrounds were sometimes grouped together in programs, as were participants employed in different areas of Jewish education, including early childhood, day and congregational schools.

In many cases, diversity of the student population allowed for cross-pollination and dynamic interchange. However, in other cases, such diversity posed a challenge.

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<sup>37</sup> Berman Center work ends with the submission of an evaluation report, unless contracted otherwise. Therefore, no empirical data has been collected by the Berman Center about the sustained relationships and supports. Nevertheless, anecdotal data confirms the importance of ongoing support after the primary intervention.

<sup>38</sup> The professional development opportunities in the majority of the initiatives highlighted in this report targeted the teachers; however, in many cases, principals were required to participate along with their teachers so that they would be able to effectively support implementation. A few of the initiatives provided professional development opportunities specifically for principals and educational directors.



Experiences among participants of one professional development program varied greatly with respect to years in the field of Jewish education, formal academic preparation (Jewish and general educational), and consequently with respect to their engagement and readiness to deal with some of the concepts presented in the program. This relatively wide variation challenged faculty. In the words of a representative faculty member:

*I found the group to be terribly uneven. Some of the people really got the content and were interested. Some were surprisingly naïve or disinterested. This is not unusual, but I wonder about the selection criteria and the relevance of the content for some of the participants.*

**“In spite of challenges related to participants’ varied levels of experience, novices and veterans across evaluations reported that professional development programs had a positive impact on their teaching.”**

Participants in another professional development program, who had been in graduate school at two institutions for higher learning in Jewish education within the last five years, found much of the content and focus of the program redundant. These participants felt that they developed the focal program skills in their graduate work, but acknowledged that the program allowed them to revisit, and in some cases enhance, many of these same skills. Evaluation findings suggest that program providers should be sensitive to participants’ educational backgrounds and work experience to minimize redundancy of material.

In spite of challenges related to participants’ varied levels of experience, novices and veterans across evaluations reported that professional development programs had a positive impact on their teaching. Inexperienced teachers involved in one initiative felt the professional development program empowered them to enter the classroom; veteran teachers and administrators felt it was a useful refresher. A novice teacher asserted, “Most of what I do is all from the class because I know nothing else... the classroom management and teaching techniques were very helpful.” A veteran explained how she is applying what she learned through professional development:

*I used to rely almost totally on the textbook — and making copies from the teachers’ guide that I gave to the kids and expected them to get it. Now I utilize the floor space. I play Jeopardy, use flash cards, have a lot of competition — lots of games and friendly competition. It makes them laugh!*

Another veteran said:

*I now consider the main points I wish to convey during the lesson. I look for the most interesting and creative ways to convey the ideas, in ways that will ensure that a maximum number of students will actively participate in the lessons. I try to think of ways that will help me check if the students really understand the material as it is being taught. My lesson plans have become more focused. I now have tools to define my objectives and define which tools I will use to achieve those objectives.*

Across evaluations, participants and principals felt that professional development influenced participants’ teaching skills and behaviors. Teachers reported that they consciously integrate the principles they learned as they plan and implement their lessons. Six of the seven school directors interviewed for one evaluation indicated that

teachers employed effective new teaching methods as a result of their training. They reported that trained teachers adopted good pedagogic practices including well-planned lessons, appropriate adaptation of curriculum and materials, and less reliance on texts.

Teachers and educational leaders across initiatives described how the participation in professional development programs enhanced their professional confidence and feelings of competence. Lay leaders and professionals noted that the initiative had profoundly positive effects on professional self-image, and perceived effectiveness of the participating education directors. Two participants in one program provided examples of people's changed perceptions of them as school leaders. One participant said she believed that her enthusiasm about the program and the changes she instituted as a result of participation led to a revision of her employment contract and an increase in salary; a second received positive feedback that she directly attributed to her professional development experience.

Professional development programs gave participants an increased (or sometimes new) sense of credibility with their colleagues and constituents. One respondent said: "I feel more professional; that I know what I am doing. I just had an open night for parents and I used the skills I learned in the program. All the parents complimented me." Both teachers and principals indicated that professional development contributed greatly to participants' vision of themselves as educational professionals with skills and knowledge. The professional development experiences and opportunities for collegial interaction were seen as integral to developing this self-concept. Some respondents articulated a connection between enhancement in Jewish knowledge and skills and increased confidence.

Across evaluations, the opportunity to network with colleagues community-wide was a highly valued aspect of professional development. School leaders in many congregations approached teacher training as a vehicle for enhancing collegiality among teachers within schools and across schools. Respondents indicated that networking among peers and mentors made them feel less isolated and enhanced their confidence. A number of participants said that being a part of a supportive network was the most significant impact they experienced from the program. Others credited participation in an initiative with combating a sense of isolation. An educator explained, "you are working in a field where you don't have contact with other educators... the experience of meeting people with the same struggles and being able to share those struggles with others is positive." An educator director said: "I am not the only one struggling with things... There is support out there if I need it. You can feel isolated and it can be depressing... [The initiative] provided built-in thinking time, which was very nice."

School change initiatives enabled participants to see colleagues in other settings on a regular basis (rather than once a year at a professional growth day). A teacher explained: "It's only through [the program] that I've made contact with teachers teaching the same grades as I am. My school meetings are usually with the principal."

Networking took place through meetings, workshops, conferences and courses, as well as through 'cross-pollination' facilitated by the program consultants.<sup>39</sup> Nearly all of the

<sup>39</sup> Initially, the program consultants did not initially use online or other technology-based tools; however, many have begun to use such resources.

respondents in one initiative indicated that their participation brought about closer relationships with other schools and congregations.

Through the various initiatives, synagogue leaders had ongoing opportunities to collaborate with each other and learn from their own work. These expanded partnerships had a ‘ripple effect’, increasing important opportunities for experimental action plans.<sup>40</sup> For example, one synagogue began an active havurah program for interfaith couples, and parents of interfaith couples. Through sharing this model with other leaders, another synagogue adapted and expanded the parents of interfaith couples program, working in partnership with another nearby congregation as well as linking to Jewish Family Service for planning and programming.



“Professional development programs have had an impact that has reached beyond the participants. Change initiatives raised community awareness and commitment to professional development.”

Based on the numerous examples of fruitful exchanges between individuals and organizations community-wide, **evaluation findings indicate that communities should capitalize on the positive culture created through the change initiative by deliberately continuing to nurture ‘Communities of Practice’.** Possible strategies could include: strengthening existing councils, developing new networks for other groups and enhancing communication mechanisms (e.g., list serves, creating a website for knowledge sharing).<sup>41</sup>

**Professional development programs have had an impact that has reached beyond the participants.** Change initiatives raised community awareness and commitment to professional development. An education director described how the program made professional development the norm in the community by requiring and financially supporting intensive, ongoing teacher development. Several education directors noted that since participating in an initiative, they have a better understanding of the value of professional development for their teachers. The experience helped them articulate desired skill sets for potential teachers and led them to require participation in future professional development efforts. That initiative led to enhanced views of the synagogues’ teaching staffs.

**Berman Center evaluators observed several barriers which impeded the application of the lessons learned through professional development, including philosophical opposition, time constraints, insufficient resources, and lack of ongoing support and mentoring.** When professional development took place off-site, some participants faced a lack of support from school leaders. Respondents in one evaluation indicated that they were unable to use the approaches encouraged in the professional development course because their principals required different formats. Several school leaders asserted the need for better communication: if they knew more about the curriculum and what the teachers in their schools were working on during offsite professional development, they could reinforce the learning. Several acknowledged a tension between what the teachers were learning in the program and the approaches or requirements of their schools, leaving the teachers caught in the middle. These findings confirm research conducted about The RE-IMAGINE Project of New York. In the third round of The RE-IMAGINE Project of New York, coordinators redoubled their efforts to “encourage early and frequent communication so that the congregation and the board are aware of the vision and the new educational initiatives that are being planned.”<sup>42</sup>

<sup>40</sup> Peter M. Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization*, A Currency paperback edition, (New York: Doubleday/Currency, 1994).

<sup>41</sup> As noted, some of these strategies have been utilized.

<sup>42</sup> Annette Koren and Amy L. Sales, *The RE-IMAGINE Project of New York: Case Studies* (Waltham: Cohen Center for Modern Jewish Studies, 2006), 8.



Findings from evaluations revealed the need for ongoing professional development.

While the majority of respondents across evaluations acknowledged that strides were made with regard to teaching efficacy, there was also widespread acknowledgement that becoming an effective teacher is a gradual process that requires considerable time, experience and expertise. In one evaluation, the principals interviewed recognized that participants in the professional development program required additional training as well as extensive supervision and mentoring. While they were introduced to the fundamentals of good teaching, additional experience and guidance was needed in order for teachers to make this knowledge a regular part of their practice repertoire. Participants in professional development programs have a continuing need for ongoing feedback, supervision and guidance.

Recognizing the need for follow-up, participants of another program asked about the possibility of having an annual reunion or Shabbaton. One person suggested that current participants could be future program mentors: “I think I would have yearly meetings, reunions with the same cohort to catch up, see how we have changed, how we implemented things. ...Maybe some of us who have been through it can apply to be mentors now that we know what it entails.”

Findings suggest the importance of creating a ‘Community of Practice’ so that alumni can continue to learn together and support one another. Teachers would benefit from ‘stage two’ support that would help them continue their professional growth, even after initial intensive seminars. These could include stipends for continuing education, advanced courses and workshops, and more intensive and longer-term mentoring or student teaching.

# Additional Learnings About Congregational School Change Initiatives

Several other important lessons emerged from the Berman Center evaluated initiatives regarding the:

- pace of change initiatives,
- transiency of educators,
- changes within the field of Jewish education at-large,
- lack of funding and time,
- evaluation, and
- broader impact of change initiatives.

## Pace of Change Initiatives

Each congregation moves at a different pace and has different strengths and needs. With this principle in mind, the educational director and facilitators participating in one initiative guided congregations through focus groups, surveys and interviews to help them learn more about their own needs and desires. This process informed the development of unique programs to meet the distinctive needs and wishes of the congregants.

## Transiency of Educators

A major challenge to effective change is the transience of educators. High rates of turnover in the field of Jewish education contribute to the challenge of creating lasting change.<sup>43</sup> The efficacy of change initiatives is dependent on both the ongoing commitment of volunteers and on the retention of professional staff. In one evaluation, key informants were asked what factors they believe can make curriculum last or ‘stick’ within a school. The majority of staff felt that retention of the education director was the most important factor that determined whether a school continued to use the curriculum.

Berman Center evaluators observed how turnover of key personnel can be detrimental to the change process. A program staff member explained: “When you change a major player, the new person is not necessarily committed to past and future work... An education director or senior rabbi changes and that can lead to wholesale changes in the curriculum.”

According to Isa Aron, one prerequisite for a congregation to effectively change is the stability of the congregation. Stability among professional and key lay leaders is essential, since change brings upheaval.<sup>44</sup> In a number of evaluations, individuals who

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<sup>43</sup> Jack Wertheimer, *Recent Trends in Supplementary Jewish Education* (New York: AVI CHAI Foundation, 2007), 12

<sup>44</sup> Isa Aron, *Becoming a Congregation of Learners: Learning as a Key to Revitalizing Congregational Life*, (Woodstock, VT: Jewish Lights Publishing, 2000), 94.

participated in professional development programs benefitted greatly but have since left their jobs or taken a hiatus to have children. The challenge is also extant in the field at large: 31% of complementary school teachers surveyed in Educators in Jewish Schools Study (EJSS) can imagine leaving the field of Jewish education within the next several years.<sup>45</sup> Since personnel transition is inevitable, it is necessary for complementary schools to build in mechanisms to address this challenge (e.g., developing collaborative leadership structures, providing ongoing professional development, etc.).

## Changes Within the Field

[The field of Jewish education is constantly changing.](#) Doubts about the continued relevance of changes emerged in a number of initiatives. The program staff of one initiative expressed concern about the extent to which changes to curricula stay relevant over time. Program staff asserted that for a curriculum to remain viable, education directors should follow-up with teaching staff to continue in-service training with the curriculum. According to one education director, the manuals must be reviewed each year for a curriculum to remain current.

The constant nature of innovation and change in Jewish education may mean that long-term usage of a curriculum may not be realistic or even beneficial in every school. Findings indicate that long-term use of the curricula is not the most appropriate measure of the program's success.

## Lack of Funding and Time

[Lack of funding and time are perpetual challenges.](#) The small number of classroom hours, the sizeable cost of additional staff people, and the difficulty of recruiting volunteers emerged across Berman Center evaluations. Several teachers noted that they have difficulty finding sufficient classroom time to fully implement recommended curricula. This problem is not unique to the initiatives evaluated. Interviews with 12 directors of complementary schools revealed that because of limited class time, schools must choose between breadth and depth of knowledge conveyed.<sup>46</sup>

Another challenge is the ongoing need for, and cost of, hiring more teachers. Many schools require additional staff to give students the attention they deserve. However, increasing the number of staff members increases the costs of running the program.

Across evaluations, volunteers were typically in short supply. [Berman Center evaluators noted a tension between the amount of time change agents felt was needed to build the requisite understandings and complete a planning process, and the realistic amount of time that volunteers were willing to expend.](#) In one congregation, despite the increased involvement and enthusiasm of new leadership, there was still a worry of 'burn out' of lay leaders and weariness of the tendency to continually rely on the same leadership. Change agents helped synagogue leaders to connect new people to projects that fit their specific interest, and engaged people in Jewish study through courses and conferences to support their volunteer efforts.

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<sup>45</sup> *Educators in Jewish Schools Study (EJSS)* (New York: JESNA's Publication and Dissemination Project: An Initiative of JESNA's Learnings and Consultation Center in Partnership with JESNA's Berman Center for Research and Evaluation in Jewish Education, 2008), 24.

<sup>46</sup> Lauren Raff, "Challenges and Strategies: Notes for the 'Front Lines' of Congregational Education," (New York: Think Tank for JESNA's Center for Excellence in Congregational Education, 2003).

## Evaluation

The importance of evaluation is widely noted by scholars in the field of educational change. As Senge, notes: “No learning can take place without continuous assessment.”<sup>47</sup> Cultures of evaluation serve external accountability as well as internal data processing purposes. “The production of data on an ongoing basis enables groups to use action planning as well as external accounting,” they write.<sup>48</sup>

The change initiatives evaluated showed dedication to continuous program improvement through commitment to evaluation and reflective practice. Evaluation introduced high levels of accountability to the congregations, and offered a model of responsible implementation to the entire community.

Ongoing formative assessment and reflective practice aimed at guiding improvement were employed by a number of initiatives. Leadership learned to document their efforts for self-analysis as well as for external review. Lay and professional leaders at congregations became adept at articulating measurable goals, to which they held themselves accountable and which they used for informing the next steps in their planning processes. Congregational committees developed mechanisms to evaluate programs and to elicit participants’ feedback.

Congregations involved in one initiative developed a range of strategies and methods for data gathering (including focus groups, surveys and interviews) and techniques for gathering information on Shabbat (to address restrictions in a number of congregations). These efforts were supported through coursework, special presentations, and coaching and guidance from program consultants. Committees developed the discipline to immediately review feedback and assessment results in order to guide planning and next steps, to let go of what was not working, and to remain responsive to the needs and desires of their constituencies. Many congregations submitted full and detailed internal evaluation reports at the end of each program year. These reports consisted of descriptions of the change processes and ensuing projects, assessments of achievement relative to the congregations’ articulated goals, reflections about successes and challenges, and statements of future directions and plans.

Program staff and several synagogue lay and professional leaders involved in one initiative asserted that the reflective stance of the staff coupled with findings from the more formal evaluation conducted by the Berman Center led to mid-course corrections that improved implementation (and therefore the impact) of the program. The commitment to ongoing evaluation modeled good practice for the participating synagogues. Responses revealed that participants came to recognize and take ownership for the importance of ongoing assessment to measure internal achievements. According to a rabbi: “The general system of assessment was very helpful for us to identify the issues and track our progress on them.”

## Broader Impact

The broader impact of school change initiatives was illustrated by the evaluations. Relationship building created shifts in communal culture. Communal support for congregational education was heightened. Among respondents in one evaluation,

<sup>47</sup> Peter M. Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization*, A Currency paperback edition, (New York: Doubleday/Currency, 1994), 6.

<sup>48</sup> Michael Fullan and Matthew B. Miles, “Getting Reform Right: What Works and What Doesn’t,” *Phi Delta Kappan*, 74, 1992, 745-752, 56.

there was unanimous agreement that the federation's attitude toward and support for congregational education had changed and improved. Some saw this as a ripple effect of the change initiative: respondents acknowledged that in the past, relationships between congregations and federation had not been positive.

[Berman Center evaluators found that relationships and communication patterns between the central agencies and the schools greatly improved.](#) In response to open-ended questions, seven principals stated that they have had more direct interaction with the central agency for Jewish education, as well as greater communication and sharing of information. Fourteen of 17 principals in one evaluation indicated that the relationships between their schools and the central agency for Jewish education have intensified and have been enriched since the inception of the change process. Respondents from many schools reported that they became more involved in central agency programs as a result of change initiatives.

Program staff, education directors and teachers all said they have a better understanding of what central agencies have to offer schools. Respondents in one evaluation asserted that since the inception of the change process, they have come to view the central agency as a comprehensive resource for their schools. Ten of the 17 principals who responded to the survey wrote that they now have greater recognition of the federation as partner in improving congregational education.

# Conclusion

This report synthesizes lessons learned from Berman Center evaluations of 10 complementary school change efforts in order to provide insight into, as well as to advocate for, collaborative change efforts. Throughout this report, the exploration of critical aspects of complementary school change initiatives helps us identify specific strategies to pursue.

It is important to remember that **complementary educational change is a multi-dimensional process**. These efforts employ various approaches and foci for the change process. Some emphasize visioning and goal setting, and some focus on curricular reform. Professional and lay leadership is the foundation of some efforts, while others concentrate on changing the culture of schools and synagogues. Regardless of their emphasis (or starting points), the various approaches to change typically address multiple dimensions. The initiatives that take explicitly systemic approaches to change encompass all of these dimensions: vision and goal setting, content and methodology, personnel and institutional culture.

Further, systemic change processes produce powerful impacts in a variety of domains. Based on responses and feedback provided by key stakeholders (including education professionals, synagogue lay and professional leaders, teachers and students), systemic change initiatives are particularly effective in: developing professional and lay leaders' skills and effectiveness, increasing the skills and knowledge of classroom teachers, enhancing students' experiences in the classroom, and markedly increasing enthusiasm, energy and pride among lay leaders and professionals. Additionally, the changes and collaborative processes introduced have been incorporated in the congregations' broader cultures and methods of operation.

**Rigorous evaluation and assessment is an essential component of successful complementary educational change initiatives**. Ongoing formative assessment and reflective practice aimed at guiding improvement increases the effectiveness of these educational change initiatives. Evaluation introduces high levels of accountability to the schools and offers a model of responsible implementation to the entire community.

**School change initiatives that were successful in building consensus among key stakeholders reported many benefits, including: lay leaders' greater understanding of the educational issues facing their schools, and their increased familiarity with their school's program**. Lay leadership became more effective in performing their roles within the education committee and in the broader congregational context. Open communication is the primary tool in developing relationships within the congregation between its lay people and professionals.

**Curricular interventions affected both the content of learning and teaching style**. When teachers were well trained and supported, by mentors as well as peers, utilizing curricula as an intervention strategy empowered them with the tools and impetus to provide more challenging and thought-provoking lessons that were more structured, better prepared and well organized. Additionally, teachers paid greater attention to individual students' needs and were more focused on students' accountability.

The role of professional development cannot be underestimated. Participating in meaningful opportunities for ongoing professional growth gave teachers the tools and motivation to be more innovative, and showed evidence of improved content knowledge and pedagogic skills. Principals also need to be involved in such opportunities so that they are able to effectively support their teachers in follow up to the professional development sessions. It is clear that educators at all stages benefit from ongoing professional development. Schools engaging in change initiatives should build in such opportunities well beyond the first stage of change implementation.

The extent to which a school is successful in fostering internal and external collaborations to develop and support the change initiative relates to its success with the change initiative overall. As Fullan and Senge suggest, collaboration and shared leadership emerge as both a means to an end, and an end in itself.<sup>49,50</sup> Collaborations should include those internal to the organization (e.g., between the rabbi and education director, *both* of whom are critical to the process) and those external to the organization as well (e.g., between the school and the community's federation and central agency for Jewish education). Outside consultants (the roles of which were highly endorsed) are often able to foster such collaborations as part of their role in facilitating the change initiative.

It is also important to keep in mind other factors, such as the pace of change initiatives which varies according to the unique circumstances of each school; the transiency of educators and changes within the field of Jewish education at-large, both of which are realities that can positively and/or adversely affect schools; the lack of funding and time for both the effective engagement in a change initiative and its ongoing successful implementation; the critical importance of evaluation during and in follow-up to the change initiative; and capitalizing on the broader impact of change initiatives which are manifest not only throughout the school, but in its larger organizational and communal structure as well.

Complementary schools are the main source of Jewish education for approximately 70% of Jewish children in North America.<sup>51</sup> Hand in hand with this tremendous educational opportunity comes the challenge to build and maintain consistent levels of excellence. Such a pursuit requires that schools and their lay and professional leadership insure that their visions and goals are shared and well articulated. Further, the content being taught and the methods used to deliver that content must offer students the very best of Jewish education, investments need to consistently be made in educators and their ongoing professional development, and it is critical that the schools themselves are well rooted within their larger institutions (e.g., synagogues).

Given the overwhelmingly large sector of the population it currently serves, the effectiveness of part-time Jewish education is critical to the vitality and future of the Jewish community in North America. An exciting, engaging, meaningful, content-filled educational experience for these students is more pressing a need than ever before. The lessons learned from Berman Center evaluations of 10 complementary school change initiatives complements what has been documented by theorists of change, and create a strong foundation for further development of both tested and alternative models of school change initiatives. JESNA is confident that we have arrived at a time to build — **עת לבנות**.

<sup>49</sup> Michael Fullan, "The Return of Large-Scale Reform," *Journal of Educational Reform*, 1, 2000.

<sup>50</sup> Peter M. Senge, *The Fifth Discipline: The Art and Practice of the Learning Organization*, A Currency paperback edition, (New York: Doubleday/Currency, 1994).

<sup>51</sup> Jack Wertheimer, *A Census of Jewish Supplementary Schools in the United States 2006-7* (New York: The AVI CHAI Foundation, 2008).

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# Appendix A: Descriptions of Initiatives Evaluated by the Berman Center

## Building Leadership Capacity for Educational Excellence & Congregational Transformation

This project is a Synagogue Based Educational Visioning and Implementation Pilot Initiative of the Jewish Education Center of Cleveland (JECC) in partnership with Laura and Alvin Siegal College of Judaic Studies (Siegal College). The three main goals of the pilot project were: 1) building leadership capacity across an institution (volunteer leadership, rabbinic leadership, educators); 2) developing shared visions and goals, analyzing needs and resources, and aligning vision with educational experiences; and 3) fostering a congregational culture of continuous improvement and “transformation” in the educational arena. The Temple-Tifereth Israel (TTTI) served as the pilot site for this four-year pilot project.

The Pilot Project was divided into three phases. Phase I was the designing of the Planning Phase. The Core Planning Group (CPG), composed of key volunteer, rabbinic and educational leadership with support from outside consultants, undertook this work. Phase 2, the planning phase, focused on the convening of The Learning and Leadership Task Force to accomplish the goals set out in the Task Force Charter. The “deliverables” to be produced by the Task Force included: vibrant new learning alternatives that provide individuals with learning experiences that are substantive, meaningful and create a sense of community; a vision for a transformed congregation that excites and engages the congregants and the entire staff; a leadership development plan to support the vision; and plans and an implementation strategy for learning programs that move the congregation toward the vision. The third phase of the pilot was the implementation of plans and strategies designed to achieve the goals and vision developed by the Task Force in the Planning Phase.

Berman Center evaluators provided an “early snapshot” of the congregation and the Task Force at the beginning of the planning phase of the initiative. The “early snapshot” memo was designed to: provide feedback and formative data to guide and inform the

project as it unfolded; serve as a reference point for assessing the extent and quality of changes that come about by the end of pilot project; and document the stages and emergent issues in the development and evolution of the pilot projects (in order to form the basis for “lessons learned” and guides for replication). Data sources included: 1) written documents; 2) responses of key informants to the baseline interviews; and 3) CPG members’ responses to written reflective questions after the retreat.

## Center for Excellence in Jewish Teaching (CEJT)

The aim of the Center for Excellence in Jewish Teaching in Bergen County, NJ, is to begin to address two fundamental challenges facing Jewish education: recruitment and improvement of the overall quality of Jewish educators in Jewish schools. To this end, CEJT is a teacher education program designed to enhance the skills of both novice and experienced teachers. The program's five components are: 1) a 13-week intensive pedagogic training course, 2) participation in the annual Conference on Alternatives in Jewish Education, 3) mentorship by an experienced Jewish educator 4) project grants to allow course graduates to develop new, experimental and innovative programs and/or materials for their classes or schools, and 5) individualized Judaic enrichment through the Florence Melton Adult Mini-School or a Hebrew Ulpan.

The Berman Center evaluation focused on the quality and impact of the program on the participating teachers. The goals of the evaluation were both formative (to provide ongoing feedback to allow for mid-course corrections and development of the project) and summative (to assess the impact and effectiveness of the program and its component parts). The evaluation explored participants' assessment of the program, their perceptions of the program's impact on their knowledge, attitudes and self-perceptions as Jewish educators, and on their classroom behaviors and pedagogic skills. Additionally, principals at participants' schools were asked to assess the impact of the CEJT on the knowledge and classroom behaviors and pedagogic skills of the participating teachers. Finally, the evaluation explored what each component added to value to the program and to what extent the components were complementary.

The evaluation featured a multi-faceted design that incorporated qualitative and quantitative data from multiple perspectives at various times throughout the program. Some aspects of the evaluation were conducted as self-studies, administered by CEJT staff

while Berman Center evaluators administered other components. Documentation (including application forms, resumes, personal philosophy of education statement, and Jewish educational profile) were analyzed and reviewed. Course feedback surveys provided participants' assessment of the instructor, course structure and content. Participants were interviewed, focusing primarily on how they felt they had applied their learning to their classroom behaviors. Interviews with principals focused on their assessment of the extent to which participants applied their learning to their classroom behaviors. Finally, mentors' protocols were analyzed, also focusing on their assessment of how participants applied their learning to their classroom behaviors.

## CHAI Curriculum Initiative

First introduced in 2001, the CHAI Curriculum was designed by the Union of Reform Judaism to facilitate lifelong Jewish learning within Reform congregations. The aim of CHAI is to strengthen the educational process for students in Reform movement schools, regardless of congregational school size and existing resources. CHAI responds to the need to ground students in the dynamic balance between Torah (study), avodah (worship), and g'milut chasadim (acts of caring and social justice) in Jewish life. CHAI follows a “backward design” model, as defined Wiggins and McTighe’s “Understanding by Design” framework for curriculum development, a practice that is widely used in the field of general education.<sup>52</sup> Based on the principle of “backward design,” curriculum is designed by identifying desired outcomes.

The curriculum core is comprised of 27 one-hour lessons for each of seven levels. CHAI materials include teachers’ guides and student workbooks. In addition, training and support are facilitated through summer training institutes, regional and onsite in-service programs, on-line courses, a listserve, and consultation with Union for Reform Judaism Regional Educators. Also available is a complete Family Education curriculum, including 14 ready-to-teach lesson plans, a Jewish Family Education Guide and a Family Shabbat Workbook. Early childhood parent education lessons, parent education for school-age children, and guides for Temple Boards and Religious School Committees are included in the CHAI Curriculum as well. Another component of CHAI is Mitkadem, a self-paced individualized Hebrew language program that begins with Hebrew letter recognition and decoding skills and progresses through study of blessings, prayers and ritual observance.

The URJ engaged JESNA to provide a source of independent evaluation of CHAI’s effectiveness, and to aid in the continual responses, changes, and upgrades to be made based on feedback. Since the inception of the

CHAI curriculum, JESNA’s Berman Center for Research and Evaluation (the Berman Center) has conducted extensive evaluations of the CHAI program. The initial phase of the evaluation was primarily formative: gathering and analyzing information about implementation of the various components of CHAI to guide mid-course corrections and modification to the materials, training, and support services. Previous evaluation foci have been: classroom materials, teacher training retreats, Mitkadem, parent education and family education units.

The goal of the implementation evaluation was to assess how CHAI is being implemented in a cross-section of Reform congregations, and to gather early indicators of perceived effectiveness and satisfaction. The evaluation focused on factors and processes in the adoption and implementation of CHAI by the congregations. Data was gathered about key congregational professional and volunteer leaders’ initial perceptions of the effectiveness of CHAI as a curriculum for their congregations’ educational programs. Key congregational professional and volunteer leaders’ initial perceptions about the impact of CHAI on teachers, students and schools were also collected. Data was collected using a survey of respondents identified through a stratified random sample of ten congregations that had ordered multiple copies of CHAI materials and reported that they “were using CHAI.” A total of 29 in-depth telephone interviews were conducted with key informants from the congregations.

Based on recommendations from the *2004 Implementation Study*, the URJ re-engaged the Berman Center to conduct a systematic assessment of student learning. The aim of this assessment was to *begin* a process of developing strategies and valid and reliable measures to examine the impact of CHAI on student learning. Data was collected for this phase of evaluation using written surveys for students and their religious school teachers.

<sup>52</sup> Wiggins, G. and McTighe, J. (1988)

## Jewish Educator Corps Program (JEC)

Established in 2000, this program was one several initiatives that JESNA developed to address the shortage of qualified personnel within the field of Jewish Education. This program capitalized on the fact that many Jewish educational institutions around the country relied on untrained local university students to fill teaching positions in their schools. Working with Hillel: The Foundation for Jewish Campus Life, JESNA developed a program to expose these students to the possibility of careers in Jewish education as well as to improve their classroom teaching experiences. The JEC program was designed to include four main components: 1) a college credit-bearing seminar, 2) paid placement in a Jewish educational institution, 3) assignment of a mentor within the educational setting in which they are working, and 4) a final seminar/retreat organized by JESNA and Hillel. The main goal of the JEC program was to expose and educate students about the possibilities and positive aspects of working in Jewish education.

The JEC program, which was originally proposed as a two year program, operated as a one year program on three college campuses: Brown University in Providence, RI; University of California in San Diego, CA; and Washington University in St. Louis, MO. At the time of the evaluation, approximately 150 students had participated in the program.

Each campus site conducted ongoing evaluations of its local programs. Students provided feedback through written surveys regarding course content and their placement experiences. Program Directors used this feedback to monitor their individual programs. Berman Center evaluators conducted in-depth interviews with program providers and students at the end of the second program year. A brief “participant profile” questionnaire administered when participants entered the program collected basic demographic information and data on students’ Jewish lives (e.g., religious denomination, synagogue membership, Jewish education as a youth and in college), previous work experience in the Jewish

community, as well as attitudes towards Jewish learning. A “baseline” questionnaire (also administered upon entry into the program) queried students about their considerations of career choices and their perceptions regarding careers in Jewish education. Baseline and exit data were collected from students at the three program sites during the program year. Finally, a survey was used to measure the overall impact of the JEC program on students’ attitudes towards careers in Jewish education.

## La'atid: Synagogues for the Future

Launched in 2000 by the Commission on Jewish Education of the Jewish Federation of Greater Hartford, La'atid: Synagogues for the Future is a community-based initiative that aims to help congregations nurture a strong sense of Jewish identity, increase Jewish knowledge and enrich Jewish living in their constituents of all ages. Over an initial three-year period, the first cohort of three synagogues engaged in individual organizational change processes which reflected and responded to each congregation's vision, culture and needs, and which helped each congregation advance toward its own goals. While each congregation was expected and encouraged to develop its own unique vision and goals, they all shared the project's common set of over-arching aims and definition of success. They all included the involvement of a broad base of professional and lay stakeholders in congregational planning and decision-making. The organic interconnection of synagogue and school was fundamental, with the school seen as central to the congregation's purpose, mission, goals and activities. Every congregation worked to strengthen and expand partnerships among professionals and lay leaders. Each implemented experimental action plans to bring their congregations closer to their idealized visions of themselves. Congregations would institutionalize these processes of change and collaboration into the fiber of the congregations within three to five years.

Additional funding was secured in 2003 for a second phase of La'atid. In Phase II, the work with the first cohort of congregations was continued. Additionally, a new emphasis on congregational schools and developing professional learning communities was implemented. Using best practices learned from La'atid I and other national initiatives, two new congregations were added to the initiative. In 2007, an additional 3 congregations were added to La'atid in Phase III, with all La'atid congregations now emphasizing schools and developing professional learning communities.

La'atid provides to congregations from both cohorts ongoing support and guidance for congregational strategic visioning, planning and implementation through consultation with a local facilitator and the project's Educational Director. Lay and professional leaders from each of the congregations enroll in relevant

credit-bearing courses at the Hartford Institute of Jewish Studies: An Affiliate of Hebrew College. The La'atid Challenge Grants provide funding to support programmatic initiatives emanating from the strategic planning processes in each of the congregations. Annual conferences are meant to expose La'atid (as well as other community educational institutions) to knowledge and experience from field leaders and national models from outside the community.

Throughout the history of the project, the design of the La'atid initiative included both internal and external evaluation on the congregational level as well as on the project as a whole. Each congregation submits a full and detailed internal evaluation report at the end of each program year. These reports consist of descriptions of the change processes and ensuing projects, assessments of achievement relative to the congregations' articulated goals, reflections about successes and challenges, and statements of future directions and plans. In addition, Dr. Sandy Dashefsky, La'atid's Educational Director and internal evaluator, submits semi-annual assessments of progress to The Jewish Community Foundation of Greater Hartford.

The Berman Center conducted an external evaluation to provide an objective assessment of the project as a whole in achieving its over-arching goals, to offer recommendations regarding future directions and next steps, and to place findings in the broader context of other synagogue change projects currently underway in North America. Data for the external evaluation was collected from several sources. In-depth telephone interviews were conducted with key informants from each congregation. A group interview was conducted with a cross section of lay and professional leaders from all five (5) cohort I and II La'atid congregations. Extensive and ongoing consultation and weekly discussions took place with the internal evaluator, as did periodic updates from the professional facilitators. The internal evaluation reports compiled by each congregation were reviewed. Finally, reports and communications from other synagogue change initiatives currently underway were included. (There will be an evaluation by the Berman Center of La'atid cohort 3 in 2009.)



## Leadership Institute for Congregational School Educators

The Leadership Institute is a two and a half year certificate program for principals from multiple denominations — Reform, Conservative, Reconstructionist, and Orthodox — who lead congregational schools. The Institute is a joint project of Hebrew Union College-Jewish Institute of Religion, Jewish Theological Seminary, and the UJA-Federation of New York. The program offers congregational school educators (from the greater New York metropolitan area), the opportunity to focus on three main areas: leadership, pedagogy and Judaica. The leadership curriculum introduces participants to current research on educational leadership and focuses on reflective practice, school management, the culture of the school, and congregation and lay-professional relationships. The Judaica curriculum helps principals communicate Jewish values, skills and practices in their schools by focusing on texts, theology, ideology, role modeling and personal religious growth. The pedagogy curriculum works to strengthen the identity and effectiveness of congregational school principals as mentors. Principals are introduced to current research on learning, and given the opportunities to hone critical supervisory and pedagogical skills.

The Institute involves two intense summer training sessions, eight 1-2 day symposia, a mentoring program, and a seminar in Israel. The summer seminar evaluated was organized around three major themes (Creating and Implementing Vision, Reflective Practice, and Creating and Leading Change). Other programmatic components were designed to complement the thematic foci, to address other over-arching goals of the Institute and to prepare and engage participants in other aspects of the Institute (i.e., case studies, Bible and *siddur* text study, mentor meetings, preparation for the Individualized Learning Plan, and introduction to 360 Degree Assessment). The symposia featured presentations by noted field leaders, as well as opportunities for participants to interact with each other and to apply and reflect on the material presented through discussions, case studies and peer consultancy groups. Symposia focused on topics such as educational research, business and financial management, curriculum and instruction, family and group dynamics, organizational management, lay-professional relationships and grant writing. During the Israel Seminar portion of the Institute, the program focused on the central role that

Israel plays in Jewish education, and provides strategies and tools for making Israel a relevant and vital component of congregational schools.

The primary questions addressed by the evaluation focused on program accomplishments in light of the goals and logic model, and the factors that contributed to these accomplishments. The evaluation focused on implementation of three symposia, Israel Seminar, 360-Degree Assessment, Individual Learning Projects (ILPs), and mentorships. Additionally, the interim impact of the Leadership Institute as a whole and of its programmatic elements on participating principals and on mentors was also included. Also a focus was the program design, including the alignment between program goals and implementation. Challenges were examined in terms of implementation and impact. Recommendations were provided to help program providers move forward most effectively.

Data for the evaluation included: group and individual interviews with Leadership Institute faculty and staff, surveys of principals and their mentors, and written documents provided by staff. The interview protocol was primarily designed to test aspects of the program's logic modeling order to answer questions of short-term impact on participants. Baseline data for the analysis of the impact of the Leadership Institute on participants was also gathered from congregational key informants (rabbis, education committee chairs) by means of written and electronic surveys. Data from the baseline and subsequent follow-up surveys and interviews are part of the Institute's Impact Evaluation. Comparative data from congregational key informants (in addition to the participants and mentors) allowed for triangulation and validation of the findings.

Comparison tests were conducted, as appropriate, for differences among the participants based on the number of years they have been congregational principals, their level of higher Jewish education and their personal Jewish denominational identification. Relevant differences are reported. Statistical tests of significance included the ANOVA for comparison of means and Chi-square for differences in cross-tabulated tables.

## Mashkon Pilot Projects

Established in 1997–98, the Mashkon Pilot Projects aim to improve the quality of education in Jewish congregational schools in the Greater Washington area. Mashkon was established by a partnership of donors and professionals whose goal is to positively affect the knowledge, attitudes and behaviors of the students and their families. The instrumental mechanism is a cluster of projects designed to improve different aspects of congregational education. Synagogues choose which programs they wish to implement, and the programs are then fashioned to meet the needs of the individual congregations and schools. Such programs include: *In-Service Training Corps*, which provides faculty with a three-session mini-course either in an area of classroom management or curriculum enhancement, combined with three follow-up visits to focus on how the training is being implemented in the classrooms; *Sh'lom Kitab*, which offers on-the job teacher training with a special needs mentor to provide the techniques needed to successfully integrate students with learning differences into the regular classroom; and *Morasha* — *The Florence Melton Mini-School for Teachers*, an intensive two year program that combines the basics of Judaism with the tools needed for classroom implementation. While each Mashkon pilot project focuses on a different venue or student population, they share a common goal of enhancing the professional skills and knowledge of the Jewish educators who are at the core of the educational process.

Ongoing formative evaluation processes provided feedback and information to guide ongoing development and to recommend mid-course corrections wherever necessary to each of the projects. At the end of Mashkon's third year, funders and program providers recognized the need to assess the project's impact. The Berman Center evaluated the impact of Mashkon projects on participating congregations, the BJE and the Federation, and on the relationships between these stakeholders. Evaluation

questions were developed in consultation with funders and Mashkon professional staff. Data was gathered to answer the evaluation questions through group and individual interviews with key informants, including participating senior educators and teachers, rabbis, community and congregational lay leaders. In addition, a written survey was distributed to the principals of each participating congregational school. The survey was a complement to the in-depth qualitative interviews.

In 2004, the Board of Jewish Education merged with two other community agencies to form a new agency, the Partnership for Jewish Life and Learning. The change in name also signified significant changes in mission and structure. Lessons learned from the Mashkon and Livnot Keshet initiatives, and the deeper relationships with Federation and congregations that resulted from focused activities, have pointed the way for the Partnership's current work in transforming congregational learning.

## The Moreshet Initiative

Moreshet was developed in 1997 in response to the shortage of trained Hebrew teachers for the supplementary schools. The Initiative is based on the belief that the Hebrew language is central to Jewish education, Jewish identity, and to the life of the Jewish people. The objective of Moreshet is to promote the acquisition of Hebrew literacy, especially in the supplementary schools, through advocacy, educator development, and community organization. To achieve these goals, Moreshet was conceived as a system-wide approach for the supplementary schools, designed to have impact on the schools, educational directors, classroom teachers, students, families and the community at large.

The program includes a three-year, pre-service, teacher-training seminar which brings new Hebrew language teachers into an intensive study of Hebrew, Judaics, and pedagogic studies, and provides coaching in the field. In addition, in-service training is provided for directors and teachers already in the field to give them new information about brain-based learning and language acquisition, to upgrade their skills, and to consult on curricula and programs. Another component of the program is Hebrew language advocacy — providing more engaging opportunities for Hebrew learning and usage in the community through programs and events.

The evaluation was designed to build upon the internal evaluation work that was part of the Moreshet program from its inception. Berman Center researchers analyzed and synthesized existing information and generated new information. Four main sources of information were used: documentation and participation statistics, a comparison of Hebrew curricula and texts pre and post participation in the program, a review of synagogue bulletins and signage, pre and post; and in-depth telephone interviews with key informants.

The program was modified in 2006 to a more individualized track, as demand for Hebrew teachers in the field decreased.

## NESS: Nurturing Excellence in Synagogue Schools

The Auerbach Central Agency for Jewish Education (ACAJE) of Greater Philadelphia launched NESS (Nurturing Excellence in Synagogue Schools) in 2003 as a community-based effort to address the need for synagogue school improvement. NESS takes a holistic and systemic approach to synagogue school improvement. Designed to “integrate the school into the overall functioning of the synagogue community,” NESS involves “the entire synagogue community — the rabbi, cantor, education committee, synagogue board, students, and parents — in the process of improving the quality of Jewish education in their school.” The goal of the NESS Initiative is to strengthen synagogue schools through professional development for teachers, leadership development for educational directors, and training in organizational development strategies for synagogue and school lay leaders. NESS provides formal training to all participating lay and professional leadership to equip them with skills necessary to work cooperatively and effectively. Six synagogue schools participated in the first three-year cohort.

NESS was originally comprised of five primary program components. The Jewish School Assessment School Improvement Process (JSASIP) assessment tool created a baseline from which to measure school change over time. Courses through the Penn Literacy Network of the University of Pennsylvania (PLN) were provided to all participating teachers and their education directors. The PLN also provided coursework and coaching for designated “mentor teachers” from each school. Lay and professional leadership from each school participated in the Professional Organizational Development (POD) and education directors exclusively participated in the Leadership Development Seminars (LDS). Over the course of the three-year pilot phase, program staff modified the Mentor Teacher component and added a Curriculum Development component to address changing realities and needs of participating schools.

ACAJE engaged evaluators from the Berman Center for Research and Evaluation to conduct a longitudinal evaluation of the pilot phase of the NESS program. The evaluation focused on the implementation of each of the primary NESS program components (JSASIP, PLN, POD, LDS, mentor training and curriculum development). Also assessed were the impact of NESS on synagogue school students, the individual program participants (education directors, teachers and lay

leaders), and the schools as a whole. The NESS evaluation was designed to answer the following research questions:

- Do the main components of the NESS program provide participants with the skills and knowledge to create effective synagogue schools that reflect a thematic, meaning-centered approach?
- Are there differences in the classrooms (teachers and students), governance structures (within the school and synagogue), and the congregational school as a whole that can be attributed to NESS participation?
- If these differences exist, do they affect students’ attitudes, knowledge and behaviors, particularly with regard to Jewish identity, involvement in Jewish community, and continuation of Jewish learning and involvement beyond Bar/Bat Mitzvah?

The NESS evaluation incorporated a multi-method, longitudinal approach to data gathering. Berman Center evaluators began by conducting an onsite “logic modeling” exercise with NESS program staff and members of the NESS Advisory Committee. Over the course of three years, evaluators collected qualitative data about program implementation and impact through in depth individual and group interviews with key informants from ACAJE (NESS staff, PLN, POD and LDS instructors) and members of the “leadership teams” (education directors, rabbis, and teachers, synagogue presidents and education committee chairs) from each of the six participating schools. Evaluators assessed the impact of NESS on students’ attitudes toward Hebrew School by means of brief surveys administered to sixth grade students before teachers had begun implementing the strategies introduced through the PLN seminars. A second cohort of sixth graders completed surveys at the end of the third program year. In addition, sixth grade students in six “Non-NESS” Hebrew schools in the Philadelphia area served as a comparison group.

At the completion of the first cohort, NESS began working with a second cohort of six schools. As a result of experiences with the first cohort and the evaluation, a number of changes were initiated, including the addition of a Family/Parenting Engagement component, and the integration of the once stand-alone Mentoring component into the Leadership Development (for Educational Directors) component.

## Project Curriculum Renewal (PCR)

This project was designed to encourage school improvement in supplementary, day, or preschools, by guiding schools through the process of curriculum renewal and development. PCR is vision focused and works from a philosophy of empowerment, using the curricular process to scaffold learning. The project works in the area of professional development to help teachers empower learners by providing curricula, materials, and ideas of how to think differently about learning and teaching. PCR was created in 1987 by the Cleveland Bureau of Jewish Education (BJE), which later became the current Jewish Education Center of Cleveland (JECC). In 1994, PCR restructured its process to focus on the following three programmatic elements: 1) a three-year intensive process of curriculum review and refinement; 2) an annual curriculum practicum — a sequence of three graduate level courses, with credit granted by the Laura and Alvin Siegal College of Judaic Studies taught by the PCR program director; and 3) short-term curricular consultations for teachers, school directors and others. The PCR process is a cooperative effort between the school and the program provider based on a general schedule.

PCR has made its programs available to all Jewish schools, including supplementary schools, day schools, and pre-schools in the Cleveland area. Supplementary schools have primarily utilized the process. Between 1994 and 2006, PCR engaged a total of nine schools in the intensive three-year process (seven supplementary schools, one preschool, and one day school). Since 1999, the JECC has been making PCR curricula available for purchase to schools locally, nationally, and internationally. According to JECC records, between 1999 and 2007, the JECC has sold 554 PCR curriculum manuals to JECC-affiliated supplementary, day, and preschools. Almost one thousand PCR manuals have been sold to institutions/schools in 20 states around the U.S, Canada, Israel, Japan, and Australia.

Based on several discussions, Berman Center staff, JECC staff, and lay leadership identified and agreed upon the primary goals for the evaluation of PCR. The aim was to examine short-term and longer-term impacts of PCR on participating schools' curriculum, leadership and student learning, as well as the impact on JECC and the Cleveland Jewish community at large. The evaluation was designed to enhance the understanding of factors that facilitate and/or hinder the ability of PCR to have a

lasting impact in a particular school. The focus of the research was on the impact of the three-year intensive process of curriculum renewal and refinement on four supplementary schools in the Cleveland area that completed the PCR program and one that was in its final year of implementing the program. Additionally, Berman Center staff posed a limited number of questions about program implementation to PCR staff and to leadership from the school currently involved in the PCR process.

The Berman Center evaluation employed exclusively qualitative methodology: documentation review and interviews with key informants from each of five educational institutions identified to participate in the evaluation process. Berman Center evaluators reviewed documentation produced and maintained by PCR staff from each participating school in order to inform development of the interview protocols and to provide a basis for synthesizing and summarizing what was accomplished in each school through its PCR process. Individual hour-long semi-structured interviews were conducted with key informants, including education directors, key stakeholders, and teachers at each participating school. Interviews were adapted to accommodate the individualized nature of the PCR work in each school. The interviews focused on the education directors' and key informants' knowledge about and attitudes toward the impact and implementation of PCR in their educational institutions. Interviews also explored current utilization of existing PCR approaches to teaching, learning, and the use of PCR materials in the schools.

Hour-long group interviews were conducted with teaching staff at four of the five sites. The teacher interviews focused on current utilization of PCR approaches to teaching and learning and on their experience with JESPs and coaching. PCR Staff individual in-depth interviews, each lasting approximately an hour and a half, were conducted with four PCR professionals. PCR staff interviews concentrated on the impact of the PCR work in each school from the perspective of the program providers. Staff interviews also included questions eliciting perceived impact on the JECC and the larger Cleveland Jewish communities, as well as questions about program implementation. The staff interviewed included the PCR program director, a current associate, and two former associates.



## Appendix B: Specific Key and Additional Learnings Referenced in the Report

## Change Theory:

- Systemic change initiatives were more successful than efforts that focused only on one element of the school (e.g., curricula).
- No matter what approach(es) is taken, there will be ripple effects to the change initiative.

## The Process of Applying Change Theory:

- Change initiatives do not take place in a vacuum.
- It is wise to anticipate affects of change for ALL involved, and to plan for them.
- Identifying potential obstacles (including people) will help determine readiness to launch a change initiative.
- Being knowledgeable about related “fields” (e.g., education, Jewish education) and organization and communal dynamics, as well as about current trends and “best practices” will aid the facilitation of the change initiative.
- During the change initiative, participants will benefit from networking, consulting and receiving support from colleagues and mentors. Peer support networks have proven effective.

## “Change Agents”:

- The Change Agent is charged with the responsibility of facilitating and overseeing the progress of the effort. S/he can take on various roles, contributing to process facilitation and knowledge building.
- Change Agents bring assets and skills that complement the resources available within the congregation, often engaging in:
  - building bridges between people and organizations.
  - providing technical and emotional support.
  - facilitating visioning.
  - providing guidance.
  - helping congregations stay attuned to the diverse needs within their communities.



- integrating and acculturating lay and professional leaders.
- mediating conflicts and working through turf and other issues.
- Engaging an outside consultant to serve as a “change agent” was found to be essential to the success of the change initiative.
- Outside change agent consultants should have expertise in organizational development, as well as deep knowledge of synagogue schools and highly developed consulting and coaching skills.
- Change agents work to “wean” congregations from dependence on their full support at the end of the change initiatives, often providing ongoing support for congregations after the intensive initial change process.

### Buy In and Consensus:

- Collaboration is both a process and an outcome in the work of organizational change.
- In the initiatives evaluated, relationship building was essential to the change process.
- Open communication is the primary tool in developing relationships within the congregation between its lay people and professionals.
- Developing a shared vision is a key factor contributing to the successful implementation of change processes.
- Cultivating a collaborative environment was an effective way to recruit and re-energize laypeople.
- Congregations that successfully cultivated key stakeholders’ buy-in reported many benefits, including lay leaders’ greater understanding of the educational issues facing their schools, and their increased familiarity with their school’s program. Lay leadership became more effective in performing their roles within the education committee and in the broader congregational context. As a result of their involvement in planning and implementing programs, lay leaders felt a greater commitment to attending programs, bringing their friends, and ensuring that programs succeeded.
- Effective fostering of a collaborative environment is dependent on the support of the rabbi (or in cases where the school is not within a congregation, the lead professional).

## Challenges:

- Lack of funding and time.
- Diversity of schools, and of key constituencies — one size does not fit all.

## “Results” of Change Initiatives:

- Within the classroom:
  - More student-centered approaches to curriculum.
  - A shift away from frontal to more active learning.
- Impact on teachers:
  - Positive change in the quality of teaching.

## Broader Impact:

- Successes lead others to want to change (whether within the same organization, or in the community at-large).
- Personal growth of participants (as Jews and as leaders).
- Stronger relationships between the school and other communal organizations (e.g., federation, central agency for Jewish education).

## Follow Up to Change Initiatives:

- The weaning process is difficult — finding the “right” ways to provide support (from the change agent, peers, and others) over time is important.
- Ongoing assessment and evaluation (formative and summative) are critical to the long-term success of the change initiative.





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