

La'atid

Synagogues for the Future

Factors FOR ***Successful Organizational Change***
IN Three Congregations

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La'atid: Synagogues for the Future --
Factors for Successful Organizational Change in Three Congregations^{1 2}

Michael Fullan's article, "The Three Stories of Education Reform (Inside; Inside/out; Outside/In)" presents a compelling analysis of top-down and bottom-up strategies for educational reform and promotes the need to combine the two (2000). His article provides a useful framework for examining *La'atid: Synagogues for the Future*, a community-based synagogue change project, in Greater Hartford Connecticut, through a case study approach involving three congregations.

In Fullan's formulation, the "inside story" focuses on the internal dimensions of effective school change, the "outside-in story" explains how external agencies can be effective instigators and supporters for creative reform at the school level, and the "inside-out story" describes the connection of the successful school to the outside community (2000).

Applied to La'atid, the "inside story" refers to how the participating congregations became more effective learning organizations, the "outside-in story" traces the roles of human, intellectual, financial and social capital that were provided by the local Jewish community in effecting the changes in the congregations, and the "inside-out story" relates to the synergistic effects of interaction between the three congregations and the ripple effects of the La'atid congregations' experiences on their congregations as a whole (beyond the initial focal areas of their La'atid initiatives) and on the community-at-large.

La'atid: Synagogues for the Future is a story of reform and reculturation in three congregations in the Greater Hartford community. The La'atid initiative is designed to help selected congregations in Greater Hartford nurture a strong sense of Jewish identity, increase Jewish knowledge and enrich Jewish living in their constituents of all ages. The Jewish Federation of Greater Hartford, the Endowment Foundation of the Jewish Federation of Greater Hartford, Inc. and the Covenant Foundation, funds the initiative. The La'atid process was developed through a strategic planning process of the Jewish Federation of Greater Hartford. The initial cohort of La'atid synagogues included three Conservative congregations.

¹ Data for this paper regarding the La'atid initiative is drawn from evaluation studies conducted by JESNA's Berman Center for Research & Evaluation in Jewish Education. Data for the ongoing evaluations was collected by means of in-depth key informant interviews, document review, and secondary analysis of surveys conducted by the congregations (with consultation from the internal and outside evaluators). This paper synthesizes data from those evaluation studies, and interprets findings in light of a theoretical framework for understanding organizational change.

² As a cue to readers, sections of this paper that refer to the "case study" of the La'atid initiative appear in italics. Sections that refer to the theoretical model are not italicized.

La'atid has enabled each synagogue community to revitalize and enrich its congregational life and to achieve its highest potential.

The La'atid initiative began by conducting community conversations with interested synagogues of all denominations to present the program's objectives and to observe the synagogue's readiness to change. The Planning and Oversight Committee (P&O Committee) of the Commission on Jewish Education (CJE) of the Jewish Federation of Greater Hartford developed an RFP (Request for Proposals) including criteria for congregational readiness such as: a history of professional and lay leaders working together; people with vision and administrative competence, and the commitment of professionals and lay leaders to engage in a change process. Synagogues were required to provide a letter of intent signed by a broad-based cross-section of the congregation to increase "buy in" as well as to complete an inventory of congregational traits to demonstrate their ability to work together. The P&O Committee subsequently evaluated and selected three congregations that best met these readiness criteria: Congregation A, a large Conservative synagogue (1200 households) located in the core area of the Jewish community, and two smaller Conservative congregations, Congregation B (375 households) and Congregation C (160 households), located in outlying towns. The fact that all three congregations were affiliated with the Conservative movement was a coincidence. Subsequently, one of the congregations in the second cohort of La'atid is a Reform congregation.

The Inside Story: Reculturing an Organization

The current literature on effective schools and organizations emphasizes how important it is for organizations to:

- 1) be mission-, vision- and goal-driven
- 2) have *shared* missions, visions and goals, and
- 3) become learning organizations (Fullan, 2000; Louis & Kruse, 1995; Newmann & Wehlage, 1995; Senge, 1998).

Innovative organizations have leaders who recognize the importance of developing a clear mission to provide a guiding light and long-term direction, as well as the need to create short-term and intermediate visions for implementation (Senge, 1998). The mission provides the aspiration and passion for the long run while the vision translates the mission into a useful guide for the process of on-going, experimental planning and processing (Senge, 1998). To be successful, creating and clarifying the mission must be a collaborative effort since the mission is the central identity of the community (Senge, 1998). In addition, each organization must create its own model and develop its own leadership through the process of change (Hargreaves & Fullan, 1998; Fullan, 2000).

All three La'atid congregations employed variations of a strategic planning, mission and visioning process (including the development of a mission statement, goal setting, alignment of programs with goals, program implementation, evaluation, and re-orientation) to direct their efforts. Many leaders from all three congregations noted that while individuals may have had ideas about change in the past, they did not have a process in place to validate and think through the ideas, nor a structured mechanism for planning and implementing them. The respondents felt that prior to La'atid this often contributed to inertia. The unique collaborative process for developing mission statements, visions, and goals based on Aron (2000), Hargreaves & Fullan, (1998); Fullan, (2000); and Senge, (1998) was central to the La'atid congregations' success. The process involved deliberate and selective planning as well implementation of innovative experimental programs.

All three La'atid congregations had teams of professionals and lay leaders that were broad-based and representative of each congregation as a whole. The teams guided a collaborative strategic planning process. An on-site CJE facilitator led each steering committee through active reflective visioning exercises and Torah study sessions. Congregations began this initial phase by envisioning their ideal synagogue five years in the future. The participants were asked to imagine that their congregation was highlighted for excellence as "Synagogue of the Year" in a major national newspaper. What would their congregation look like, be like? Ideas that emerged in the newspaper exercise were explored, developed and prioritized through interactive exercises in which participants voted for the visions that they believed were the most significant and meaningful for transforming their synagogue community.

In order to engage the entire congregational community in the visioning process, each congregation convened parlor meetings (focus groups). These meetings provided congregants with opportunities to be part of the collaborative effort. The La'atid committees then drafted mission statements that incorporated results of the visioning exercises and the parlor meetings. Thereupon, community members had opportunities to add their ideas to the draft mission statements that were publicly displayed on charts designed to record their input.

Each congregation followed its own course and pace, determined by many factors including congregational age, size, composition, culture, professional leadership and prior history. The process was very non-linear, and each congregation had its ups and downs in moving their planning procedure forward. Initially, people had difficulty understanding how a La'atid collaborative strategic planning initiative could successfully work if strong committees already existed. Some felt threatened about new La'atid leadership roles, while others expressed great impatience with

the process. Meetings in small groups and with individual synagogue leaders and La'atid consultants, held in a variety of contexts, including at breakfast, lunch and dinner as well as in parking lots, helped to mediate and reduce conflict. In addition, at times the process was modified, moving from the visioning process to specific experimental programs and then back again to process. This modification helped the congregants see visible signs of positive change. Gradually, with guidance from facilitators and the La'atid Education Director, the leadership recognized the strength of cooperative planning and mission statements were drafted. For example, the mission statement of Congregation B reads:

Congregation B is an egalitarian Conservative synagogue. As a congregation, we seek to provide a welcoming Jewish home-away-from-home for our diverse synagogue family.

Our synagogue is a place where one may reach out both to God and community; a place in which all may learn Torah and Hebrew, celebrate or mourn, observe holy times and rejoice in the beauty of the Jewish heritage.

Congregation B fosters programming that enriches Jewish life, values and education so that our members, of every age and marital status may enhance their: 1) observance of the mitzvot, both ritual and ethical; 2) involvement in Tikun Olam (repair of the world); 3) connection with the state of Israel and welfare of Jews everywhere; 4) joy and pride in being Jewish.

The mission statements provided long term guides while the visions and goals created plans for experimentation (Senge, 1998). Goals established by Congregation B reflected their mission. They included: engaging different members through a combination of out-reach and in-reach; redesigning the school and synagogue programs to include multi-levels/multi-ages, life-long learning; and creating diverse and meaningful opportunities for Shabbat experiences.

Margaret Wheatley, a leading expert on organizational change and development emphasizes, "People support what they help to create" (2001, p.5). Broad-based involvement, including representation of those who will be affected by change is essential to a successful process. Engaging all segments of the system not only harnesses a diversity of creative ideas but also creates a forum where people from many different perspectives can come together and, at times, struggle to jointly achieve their aspirations and work on meaningful visions (Senge, 1998; Shevitz, 1995; Wheatley, 2001). Admittedly, organizations that work collaboratively sometimes experience discomfort and doubt as members learn from each other and confront change (Senge, 1998; Shevitz, 1995). However, successful change processes demand that over the course of innovation and

experimentation people representing different perspectives be heard and respected without fear of judgement or reprisal (Aron, 2000; Senge, 1998, Shevitz, 1995).

Like Fullan (2000) and Senge (1998), La'atid views collaboration and "shared leadership" as both a means to an end and an end in itself. La'atid's strategy is to bring together a broad-based representation of professionals and lay leaders within each congregation, to enhance their knowledge and skills so that they can design and implement visionary experimental action plans collaboratively. These leadership groups are seen as the central cores of "learning communities" in which Torah study is a central component. Each meeting of the leadership group begins with serious text study, usually related to the task at hand or a relevant concept or value. In addition, lay and professional members of the leadership groups enroll in formal course work, attend conferences, and receive intensive mentoring and consultation. As part of the La'atid process, each congregation has developed its own unique vision and goals and has successfully planned and implemented experimental programs designed to achieve them. The changes and collaborative processes introduced through La'atid are being incorporated into the congregations' cultures and ways of doing business.

La'atid has increased enthusiasm, energy and pride among the congregational La'atid committee members. Regular attendance, willingness to assume volunteer responsibilities, and perseverance with the extended process are clear indicators of the investment of most of the La'atid leadership. This did not happen without times of struggle and disagreements. In all of the La'atid congregations, at various points in the process, turf issues and resistance by specific individuals have slowed down progress. Continuing to find common ground and talking through issues and concerns with the support of facilitators and the Education Director, as well as outside experts have helped move the communities through difficult times. The La'atid Education Director, as an outside person, has been able to analyze situations and serve as a mirror, guiding synagogue leadership to look directly at tough issues and reflect upon possible compromises and solutions. For example, in Congregation C, when there was tension with the transition to a new rabbi, private meetings were held with the La'atid Director and key professionals and lay leaders. Helping leadership express their concerns and work through turf issues during this difficult time was critical in assisting the congregation to continue to build a collaborative, creative community. Gradually, over time a sense of commitment to the vision and trust between committee members developed within the La'atid committees, similar to findings by Senge (1998), and Wheatley, (2001) in their settings.

La'atid lay leaders observed that as a result of being so involved in planning and implementing programs, they now feel a greater commitment to attending the La'atid programs, bringing their friends, ensuring that programs succeed. 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" (Isaacs, 2000, p.6)

All of the lay leaders reported unanticipated consequences of their La'atid involvement. They had not expected to experience the high degree of personal growth that has come about as a result of their being part of the La'atid committee and part of a La'atid learning community. They greatly appreciate the leadership, organizational and administrative skills that they find themselves transferring to other aspects of their professional and organizational lives. In particular, they appreciate the "Jewish growth" that they are experiencing through Torah study, learning to deliver Divrei Torah, and participating in the programs that they are planning. Several noted that their involvement in La'atid has led them to attend and participate in Jewish educational and cultural programs that they never would have considered in the past (Isaacs, 2000, p.6).

According to researchers, Fullan (2000) and Senge (1998), 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 (Fullan, 2000; Louis & Kruse, 1995; Newmann & Wehlage, 1995; Senge, 1998). Moreover, this process compels institutions to create structures for broader decision-making, greater opportunities for experimentation and collaboration, and a collective sense of responsibility for innovation and accountability (Bryk, et al, 1998; Fullan, 2000).

La'atid was a catalyst for the congregations to create structures for broader decision-making. For example, through Congregation A's, focus on Tikkun Olam committees such as social action, school, ritual, adult education and family education joined together to create a year long "mitzvah design." The project began with a kick off "Mitzvah Day" involving the entire congregation, followed by joint programming throughout the year for adults and children, interfacing with school curriculum and family and adult projects and classes. Through this experience, new opportunities were established for collaborative decision-making and experimentation with a sense of joint responsibility (Bryk, et al, 1998; Fullan, 2000).

In truth, it is the process of becoming a collaborative learning organization that allows for the possibility of "reculturing" a community – creating new ways of

working and thinking that result in systemic change (Fullan, 2000). In his telling of the “inside story” Fullan (2000) makes an important distinction between “restructuring” (changing structures of formal elements and roles of institutions) and “reculturing” (creating learning communities that constantly gain knowledge from their experience, re-assess where they are, and make mid-course corrections). It is this “reculturing” that allows for enduring and meaningful systemic changes. Being a learning organization therefore requires engaging in ongoing assessment to consolidate “lessons learned” while moving ahead in the change process (Fullan, 2000; Hargreaves & Fullan, 1998; Louis & Kruse, 1995; Newmann & Wehlage, 1995; Pekarsky, 1997; Senge, 1998).

All three congregations pride themselves on the progress they have made toward instituting this model as their modus operandi. The La’atid meeting minutes, the facilitators’ journals and each of the individual congregational reports document the extent to which the congregations have: (a) engaged lay and professional leaders as more equal partners in the planning process, and (b) sought to break down divisions between congregational administrative frameworks, organizational arms, and committee structures (e.g.; looking for opportunities for joint sponsorship wherever appropriate). The progress described by the congregations echoes the collaborative planning process described by Fullan (2000), Louis & Kruse (1995), Newmann & Wehlage (1995), and Senge (1998).

These changes have occurred over time. However, they did not occur without backsliding, discomfort and doubt as noted by Senge (1998) and Shevitz (1995). History of “how we do things here” is an anathema to the change process and, at times, has definitely slowed progress. Slowly, facilitators and the Education Director have helped the leadership to work through the many “we” verses “they” issues and build a sense of trust. At times, these consultants have also helped the congregants set aside problems that were too painful or disruptive to address. They have helped the leaders move to areas of consensus while returning to the tough issues at a later date. In Congregation B, for example, there were divisive educational issues within the school committee and within the La’atid committee about synagogue/school curriculum and restructuring. The La’atid consultants helped the synagogue leadership focus on areas of consensus that were emphasized in their visioning process, as the creation of alternative Shabbat programming and the development of havurot. After three years of positive collaborative work with a strong emphasis on supportive havurot and innovative Shabbat experiences for people of all ages, the leadership was ready to tackle their other thorny educational issues.

All key informants who were interviewed as part of the program’s external evaluation stressed how different this model is from how their congregations had operated previously, and how effective the model has

been in identifying and developing new leaders, designing exciting, innovative programming, and engaging wider segments of their congregations in the resulting programs. One respondent stated: "The way we do things now is so different. We are more organized. People are coming together and really working together" (Isaacs, 2000, p.3). By engaging a broad-based community, the La'atid model harnessed a diversity of innovative ideas as described by Fullan (2000), Senge (1998), and Wheatley (2001).

One respondent noted that in conducting a search for a new rabbi, they adopted a "La'atid" approach to identify, engage and acculturate a new spiritual leader. The search committee was broad-based representing many arms of the synagogue and people of many ages and stages. From their La'atid meetings and community focus groups the congregants had learned about the needs of their community, which guided the questions they asked of the candidates. The congregation was very clear that they were looking for a rabbi who could work in partnership with the community in a collaborative, innovative "La'atid" way (Isaacs, 2000).

Though there has been an increased involvement and enthusiasm of new leadership, there is still a worry of "burn out" of lay leaders and often, over time, there is a tendency to go back to the same leadership. La'atid facilitators have been assisting synagogue leaders to connect new people to projects of specific interest as well as getting them involved in Jewish study through courses and conferences to support their volunteer efforts.

In addition, a continuous communication flow from the La'atid committee to other committees and the congregation at large is an ongoing challenge. Creating and distributing regular and user friendly newsletters, bulletin article, and publicity as well as email updates have helped advertise the "new La'atid stories".

As an organization develops a preliminary consensus about its mission and vision, there is an opportunity to experiment with new initiatives rooted in its mission, visions, and goals. These experimental plans are initial steps. Some experiments will fail, others will succeed. All will require reflective formative assessment to inform their progress (Aron, 2000). Effective organizations are selective and deliberate in planning and integrating new approaches and experimental action plans that are consistent with their mission, vision and goals (Aron, 2000; Fullan, 2000).

Each "La'atid" congregation moved at its own pace from planning to implementation of its experimental action plans, explicitly connecting their goals to small first steps (Aron, 2000; Fullan, 2000). These initial steps

were intentionally visible experiences, projects that were likely to succeed to help fuel future initiatives.

Strengthening the interconnections between the school and synagogue and building community was a key goal for Congregation C. "Low hanging fruit" projects related to this goal included: study groups for Rosh Hashana and Sukkot and monthly sessions in which students and adults studied separately followed by a group lunch. Community involvement increased and collaboration between school and synagogue was enhanced.

Enhancing Shabbat experiences was an important goal for Congregation B. Innovative young family Shabbat programs, such as, Tots Shabbat, and Kiddush Kids, were successfully established early on as "low hanging fruit" projects, increasing participation by members and non-members.

Creating a welcoming spiritual and learning environment was an important goal for Congregation A. "Low hanging fruit" programs for Minyan/daily prayer experiences were developed including: programs to encourage broader participation across age and interest lines (especially among teens); educational programs designed to make people more comfortable and informed about the liturgy; and efforts to expand personal contacts through e-mail, personal invitations and transportation.

Not all experimental action plans have succeeded and assessment tools have helped the congregations change course as needed. For example, Congregation A, working to create a welcoming spiritual and learning environment, initiated a new Shabbat based school program including a "ruach" Junior Congregation. Though the service had successful elements, it did not become the 'service of choice' for students. Utilizing evaluation methodology that was developed as part of the La'atid initiative, the congregation was able to focus on this problem area. Applying information gathered from parents, students and professionals, Congregation A is again redesigning a new plan for Junior Congregation involving teens as leaders, featuring clubs following the service as well as increasing family involvement.

As Senge (1998) notes: "...no learning can take place without continuous assessment (p.6)". Furthermore, assessment must be undertaken for the purpose of learning and informing mid-course corrections and not just for accountability and judgement. Moreover, for assessment to be of value, the community needs to be willing to let go of what is not working. "You must experiment, assess, reflect on mission, identify results, and experiment some more" (Senge, 1988, p.6).

Ongoing formative assessment and reflective practice is a hallmark of the La'atid initiative. Each La'atid congregational committee developed

mechanisms to evaluate programs and to elicit participants' feedback. More importantly, each La'atid committee developed the discipline of immediately reviewing 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 (Fullan,2000; Senge,1998).

La'atid has introduced high levels of accountability to the congregations, and has offered a model of responsible implementation to the entire community. The La'atid leadership has learned to document their efforts for self-analysis as well as for external review. La'atid leaders have become more adept at articulating measurable goals, to which they hold themselves accountable and use for informing the next steps in their planning processes as prescribed by Fullan (2000) and Senge (1998).

Assessment and reflective practice is central to the La'atid initiative, however, at times, it has been difficult for the congregations to carve out the time and create the necessary tools for evaluation. Developing synagogue assessment requirements through the La'atid process has helped to keep the congregations on track. La'atid facilitators, and the Education Director, have served as "nudges" and as external experts to remind the congregations to follow through with evaluation. Congregational leaders concentrating on creating and implementing specific programs have found that gentle reminders and support about assessment keeps them focused. Courses and conferences about assessment have also been very helpful.

The Outside-In Story: The Community as Catalyst and Scaffolding

According to Fullan (2000), it is very difficult to introduce effective school change in isolation on the individual institutional level. Local schools benefit from support and assistance from the district or community level to build their capacity for organizational change. However, to be effective, the support must be tailored to the needs, characteristics and culture of the individual school, and the district or community needs to walk a fine line between supporting schools in building capacity and intervening and assisting when necessary (Bryk, et al, 1998; Fullan, 2000).

La'atid's staff team, comprised of the Educational Director and two facilitators assisted the three congregations in a "reculturing" process and in developing new capacities for change (Bryk, et al, 1998; Fullan, 2000). Members of the staff team were contracted on an annual basis by the external agency (CJE) to work with the congregations. The structure of yearly contractual arrangements provided for an ongoing commitment and relationship with the congregations and the community. The strong

backgrounds of the three consultants, academics in Jewish education and communication and organizational change, provided necessary expertise. In addition, the Executive Director of the CJE served as the Administrative Director of La'atid adding critical support for the project.

The Educational Director served as the visionary architect of the initiative. She played a pivotal role for the project as a whole, as well as for the efforts of each congregation. Based on her knowledge of what is required for institutional and congregational change she guided both the structural and content components of La'atid. Initially, the Educational Director designed the framework for each congregation's committee structure, and developed the guidelines to ensure that key individuals would be involved, particularly in leadership roles. By working intensively with the congregational facilitators at each step of the process and serving as their mentor, guide and resource, the Educational Director indirectly guided and directed each of the congregational initiatives. Working behind the scenes, assuming directive roles whenever necessary, the Educational Director also provided ongoing consultation and professional leadership to the coordinators/chairs and executive committees of each congregation. In addition, the Educational Director designed, taught and coordinated the formal courses, workshops and conferences that provided the substantive content to fuel the change initiative (Isaacs, 2000).

The two facilitators, who provided on-going on-site guidance and direction to each congregation, were central to the success of the capacity building projects. The facilitators attended all of the meetings at their sites, kept the committees focused, reminded them of 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. The facilitators also worked to "wean" the congregations, to make them more self-sufficient (Isaacs, 2000). Weekly conversations with the Education Director and regular meetings of the all three "La'atid" 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 (Bryk, et al, 1998; Fullan, 2000).

The La'atid initiative has been a learning process for the Education Director and the facilitators as well as the congregations. Learning to balance assistance to congregants and "weaning" the congregations to self sufficiency is a constant challenge. Working as a collaborative and supportive team, the Education Director and the facilitators have helped each other grapple with concerns and issues as well as share successes. The role of the Education Director has been pivotal in the "weaning" process. The La'atid Director, being one step removed from the on-site

facilitation, has assisted the facilitators in thinking about the appropriate “weaning” opportunities as well as helping them “let go” when necessary.

Fullan notes that a “reculturing” process also needs to develop at the district level (2000). District or community consultants must work differently with each institution, focusing on the individual needs in each school, while also producing shared communal norms and principles. Thus, to be effective, those at the district or community level must not only have the general know-how to effect change, but must also develop specific knowledge of the local institution. Elmore & Burney (1998) and Fullan (1998) found that it was essential for administrators on the district level to learn about each school and view each institution as a unique setting, adapting resources as needed. Continuous conversations between system-level consultants and the key local professional leaders (principals) provided opportunities for new learning and for the development of a common understanding of goals.

La’atid consultants tailored the process to the individual needs of each congregation, recognizing that each congregation moved at a different pace, had different strengths and different needs (Elmore & Burney, 1998; Fullan, 2000). The Educational Director and facilitators guided the congregations through focus groups, surveys and interviews to help them learn more about their own needs and desires. This informed the development of unique programs to meet distinctive needs and wishes of the congregants. For example, based on the findings that congregants desired more inclusive and deeper connections between members, consultants helped Congregation B develop havurot including support groups for intermarrieds and parents of intermarrieds as well as study and celebratory havurot for young adults, young families and empty nesters.

The external agency helps build local capacity by providing professional development and by promoting policies that support internal creative change, such as, involving parents and community members in the process, redesigning staff team work and encouraging collaborative learning opportunities to break down the separation between the staff and principal and to develop creative networks (Elmore & Burney, 1998; Fullan, 2000).

The external support system must also introduce innovative ideas and provide research information to the school in order to “prime the pump” and spur new ways of thinking. In these ways, the external agency stimulates and supports opportunities for on-site for reform and “reculturing” (Bryk, et al, 1998; and Fullan, 2000).

Central to the La’atid process 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 on-site reform (Bryk, et al, 1998;

and Fullan, 2000). Participating as teams of professional and lay leaders in semi-annual retreats and formal courses through Hebrew College: Hartford Branch, leaders were introduced to new ideas and research in areas as synagogue change, leadership development, Torah study, Jewish family education and prayer. New ways of thinking evolved. For example, as a result of innovative prayer experiences with experts, such as, Debbie Friedman, Rabbi Stuart Kelman and Rabbi Lawrence Hoffman, Congregation A initiated innovative Shabbat experiences such as meditative and healing Shabbat services as well as Shabbat Torah study sessions.

Recruiting, re-energizing and developing professional and lay leadership has been one of the foundation stones of La'atid (Bryk, et al, 1998; and Fullan, 2000). New synagogue leadership was clearly developed through participation in courses and retreats. One respondent noted that she had no plan of becoming a lay leader and yet with each class on synagogue change and leadership development she became more invested. She indicated that the courses aided her in techniques and ideas for synagogue revitalization and she eventually became a co-chair of the La'atid committee (Dashefsky, et al, 2002).

Recruiting and maintaining strong participation of professional and lay synagogue teams in classes on synagogue change as well as mentoring students is a labor intensive process. It requires many personal contacts through phone, e-mail, and meetings by the Education Director.

Bryk, et al (1998) and Fullan (2000) also emphasize the responsibility of the community consultants to help the local educators become more knowledgeable and capable in the area of evaluation so that a strong accountability system becomes fully embedded in the culture and functioning of the organization.

La'atid engaged the staff of JESNA's (Jewish Education Service of North America, Inc.) Berman Center for Research and Evaluation in Jewish Education to provide an objective external assessment of the 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. Data for the external evaluation were collected from several sources. These included:

- 1) weekly consultations with the Educational Director, who also served as the internal evaluator and periodic updates from the professional facilitators,*
- 2) internal evaluation reports compiled by each congregation,*
- 3) in-depth telephone interviews with key informants from each congregation, and*

- 4) *review of reports and communications from other synagogue change initiatives currently underway in North America (Isaacs, 2000).*

The assessment process helped the La'atid synagogue leadership learn to develop and utilize appropriate evaluative tools, and to make necessary mid-course corrections (Bryk, et al, 1998; and Fullan; 2000). Conducting an in-depth, impartial evaluation also provided the accountability that helped the funders and the Greater Hartford community recognize the success of La'atid and the importance of expanding the initiative to two new congregations in the winter of 2002.

The systematic broad-based planning and implementation processes have yielded impressive results (Isaacs, 2000). The range and depth of programming that has been implemented in each of the congregations is impressive, by any standard. The programs are well planned, substantive, well run, and well received. The fact that La'atid committee members use early results inform mid-course corrections, to build on their experience and to refine their practice as they proceed has surely contributed to their course of constant improvement (Hargreaves & Fullan, 1998; Fullan, 2000; Isaacs, 2000; Senge, 1998).

The Inside-Out Story: Synergies and Ripples

Peter Senge (1998) asserts that truly innovative experimental action plans require organizations to collaborate together, to learn from their own experiences and from the work of others. Assessment also has an inside-out focus. Educators must become knowledgeable about external standards to help inform and direct their focus. In collaborative schools professionals use external standards to help them know how well they are proceeding and to assist them in improving as well as celebrating their successes (Bryk, et al (1998) and Fullan, (2000).

While each congregation developed its own unique vision and goals, backsliding and struggling through the change process at times, all congregations shared a common set of over-arching aims. Indicators for the congregations' success to date in achieving their goals are reported in the evaluation reports. They include evidence of:

- 1) *Strengthened and expanded partnerships among a broad-based cross-section of professional and lay stakeholders addressing congregational planning and decision making (i.e., the establishment of "shared leadership" models);*
- 2) *Personal growth among professional and lay leaders related to the recognition of the importance of reflective practice and the development of learning communities;*

- 3) *The organic interconnection of synagogue and school, with the school seen as central to the congregation's purpose, mission, goals and activities;*
- 4) *Rethinking and visioning creative change opportunities (strategic planning) in the school and synagogue;*
- 5) *Implementation of experiential action plans to bring congregations closer to their idealized visions of themselves, with an improved responsiveness to the needs of congregational populations and sub-populations;*
- 6) *Integration of Jewish content, learning and values in congregational life guided by joint study of Jewish texts by professionals and lay leaders;*
- 7) *Improved communication;*
- 8) *Increased enthusiasm, energy and pride: Enhanced connection and commitment to the congregation on the part of members and leaders; and*
- 9) *Emergence as models and resources to the community for innovation, and successful congregational leadership (Isaacs, 2000).*

Through the La'atid structure of courses and conferences, La'atid synagogue leaders have had ongoing opportunities to collaborate with each other, learn from their own work as well as the work of others (Senge, 1998). This expanded partnership among La'atid leaders has had a ripple effect, increasing important opportunities for experimental action plans (Senge, 1998). For example, Synagogue B began an active havurah program for groups with special needs, such as, parents of interfaith couples and interfaith couples. Through sharing this model with other La'atid leaders, Synagogue A adapted and expanded the parents of interfaith couples program, working in partnership with another nearby congregation³ as well as linking to Jewish Family Service for planning and programming.

Similarly, in discussing the needs of singles and young adults, representatives from all three La'atid congregations exchanged ideas and established specific programs within their congregations. In addition, they developed broader networks by connecting to the Federation, the Jewish Community Center, and local universities for developing partnerships for programming for this specific audience.

La'atid has clearly emerged as a model and resource to the Greater Hartford community for collaborative, innovative experimental action plans as well as for the development of strong leadership. For example, at a Federation leadership program, one La'atid synagogue vice president

³ A congregation that was one of two congregations selected to be in a pre-La'atid pilot project known as SIP: Synagogue Initiative Program.

skillfully guided other synagogue vice presidents in understanding the need for cooperative planning rather than pushing forth an agenda without community “buy in”. He continually emphasized that he has learned this new way of collaboration through his La’atid experience.

The focus of the programming introduced by the La’atid initiatives has thus far been primarily educational. However, these educational projects influenced all dimensions of synagogue life including social action, worship, and social experiences. Important community bonding and spiritual connections have come about through Jewish learning, collaborative visioning, and planning for the future.

For example, Congregation C developed an intergenerational La’atid holiday and Shabbat series. This series was strongly rooted in the study of Torah but also brought the community together to eat together, pray together and celebrate Shabbat together, building community and spiritual experiences. Moreover, in developing a component for out-reach for new members within this education series, new collaborative infrastructures were developed with the education committee, the family education committee, the youth committee, the ritual committee, the membership committee, and the sisterhood all planning and working together.

The Three Stories in Concert

Fullan (2000) maintains that sustained change requires a strong connection across all three stories. Internal institutional development is essential; however, it cannot continue to flourish without working in close partnership with its outside community, and without the support of an external district or agency providing support for the change process. When all three stories connect there is a mobilization of the community to greater moral responsibility and to heightened creative activity. There is also a new political power to strive to conquer problems. In addition, the school and the school system increase their ability to explore and experiment in new effective ways. The three stories provide a structure for “coherence-making capacities” (Fullan, 2000).

Several key factors have contributed to the success of the La’atid initiative. A salubrious pyramid serves as La’atid’s infrastructure. The ever-widening base of involvement and the scaffolding provided by the infrastructure of a CJE La’atid Educational Director, on-site CJE facilitators, and the congregational coordinators/chairs of the La’atid committees helps ensure La’atid’s success. La’atid is fueled by active mentoring and guidance to each of the congregations, as well as formal leadership development through courses, workshops and conferences. The availability of community funding for innovative challenge grants to the congregations is also critical to the process. The grants provide seed

money that allows the congregations to do more professional work than might otherwise have been the case (Isaacs, 2000).

La'atid has been an extremely engaging initiative for all three congregations. Each congregation has worked to meet the diverse needs within its community and each congregation has succeeded in involving previously uninvolved members – and even attracting new members, because they were so invigorated. New programs have attracted impressively large numbers of participants in all three synagogues. They have brought together families and individuals who had previously not been connected to the congregation or to each other, thus developing a new sense of community (Isaacs, 2000).

After three years, the La'atid project has moved into a second phase. Recognizing that sustained change requires continued internal institutional development, a close partnership with its outside community as well as support from an external agency, the Jewish Federation and its Commission on Jewish Education have continued to support synagogues to increase their ability to explore and experiment in new, more effective ways (Fullan, 2000). Two additional congregations, one Conservative and one Reform, have become part of the La'atid initiative with additional funding from the Jewish Federation of Greater Hartford.

Financial and consultative support continues to be provided to the three veteran La'atid congregations to enable them to maintain the momentum they have thus far achieved. Facilitators are available on a less intensive level of mentoring, more on the lines of periodic consultation, to maintain the progress to date. In addition, based on the present needs of the three original congregations, a new dimension has been added to focus specifically on school change and professional development. Under the guidance of the La'atid Education Director, the three congregations have created a collaborative visioning process for transforming the schools' education systems and infrastructures. In addition, the CJE has developed an additional scaffolded structure, providing congregations with La'atid educational consultants on-site to lead monthly staff development sessions, as well as to be available as mentors for individual and small group consultations, classroom visitations, and demonstration sessions. The educational consultants are guided by the La'atid Education Director. As La'atid continues to expand in the future, an external evaluation process will continue to provide mechanisms for accountability and feedback.

There have been many “lessons learned” through the La'atid initiative including the importance of specific readiness criteria as well as distinct interventions that have made a difference. Readiness areas that have been very important include: potential of key professionals and lay leaders

to commit to intense, ongoing work with a tolerance for process; a willingness to enact a new agenda, risk and experiment; and a willingness and time set aside to learn. Though initially the Education Director and the La'atid /CJE Planning and Oversight Committee thought that stability of leadership was a critical readiness element, the CJE leaders discovered that even with new rabbis, principals and lay leaders, the congregations were able to move forward, using knowledge of the La'atid process to help them in selecting their new leadership. The shifts in leadership did, however, slow down the process.

Congregational change is difficult to accomplish. Asking people to think differently, work differently, treat each other differently sounds simple enough. However, without vigilance, it is easy to revert back to old ways. The infrastructure of an external educational organization, CJE, providing on-site support through La'atid facilitators and the Education Director has been an essential intervention for the change process (Fullan, 2000). These consultants serve as sources for ideas, act as "nudges", assist as problem solvers, listen, balance, and keep the collaborative groups on track to achieve their goals. An important element has been their guidance in helping the congregations stay attuned to the diverse needs within their communities. They help the congregations manage the change process (Fullan and Miles; 1992). "Weaning" the congregations to a structure of less support time by on-site consultants has been gradual and, at time, difficult. Finding the balance of "support" verses "independence" is a constant challenge. Consultants have reduced time at meetings but are still providing assistance when difficult issues and tensions arise. They continue 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.

Additional interventions, by CJE that have strongly supported capacity building for "reculturing" in the La'atid congregations as well as strengthening professional and lay leadership have been the formal opportunities for studying about change and leadership through courses and conferences (Fullan, 2000). Opportunities for professionals and lay leaders to learn together, build a team, and learn about the change process have helped the congregants develop a clearer sense of what to anticipate and plan more thoroughly as well as to have more realistic expectations. However, leadership development is an ongoing, uphill process. There is a constant challenge of integrating and acculturating new leaders and members. Recruiting for the classes has been extremely labor intensive but very necessary. Finding helpful orientations for new leaders is still under experimentation.

Using the lens of Torah and using traditional texts as guides in the La'atid initiative has served as an important catalyst for synagogue renewal

(Pekarsky, 1997). Exposing leaders to the centrality of Torah study has helped leaders include Torah study in many of their congregation meetings and programming. Even with the scaffolded support structure through facilitators' assistance as well as courses and conferences, in the one congregation, Torah study has not consistently been integrated as the norm, especially when there has been a transition time to a new rabbi.

The intervention of providing additional financial community resources for capacity building through a challenge grants process in year three has created the opportunity for the congregations to assess their accomplishments and weaknesses as well as plan for next steps in educational change (Fullan and Miles; 1992). The detailed grants' process, including a status-evaluation report and grant application, has provided many opportunities for creative experimental planning. In addition, the grants' assessment requirement has served as a powerful tool to make congregations accountable to the evaluation process which is so important and yet not easily internalized. The grants process has also strengthened professionals and lay collaboration.

The external interventions (the outside-in story) of facilitation and mentoring, courses and conferences as well as challenge grants, by the CJE have served as important catalysts and scaffolding for congregational change (Fullan, 2000). External interventions through CJE's courses and retreats as well as a focus on assessment, have also provided opportunities for congregations to learn from each other and create new collaborative community ventures (the inside-out story) (Fullan, 2000; Senge, 1998). These external scaffolded frameworks have supported internal interventions as: strategic planning, mission and vision processes as well as the creation of collaborative, learning organizations (the inside story) (Fullan 2000; Louis & Kruse, 1995; Newmann & Wehlage, 1995; Senge, 1998). Though much progress has been made, the La'atid congregations continue to struggle with the temptation to backslide. In addition they struggle to maintain enthusiasm and momentum without burning out leadership. Fullan and Miles (1992) report that successful organizations do not have fewer problems than other organizations, they do, however, have "deeper coping" capabilities. The external La'atid interventions have helped the La'atid congregations develop "deeper coping" mechanisms towards "reculturing" their communities (Fullan, 2000; Fullan & Miles (1992).

Fullan's formulation of three stories of educational reform: inside; inside/out; outside/in provides a useful framework for understanding the critical factors contributing to La'atid's successful change process (2000). The La'atid synagogue renewal initiative has provided congregations with the incentives and support system they need to create and move toward achieving their own visions of rich, welcoming centers of Jewish life and learning.

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