



# The Jewish Religious Leadership Institute

of the Jewish Theological Seminary

*A Proposal from the Task Force on  
Jewish Religious Leadership*



Dr. Jack Wertheimer  
Dr. Steven M. Cohen  
Dr. Aryeh Davidson  
Rabbi Shoshana Gelfand  
Dr. Barry Holtz  
Dr. James Hyman  
Dr. Charles Liebman  
Dr. Riv-Ellen Prell

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# INSTITUTIONAL PHILOSOPHY

## Rationale

As we enter the 21st century, we face not just a period of cultural change, but of dramatic social transformations as well. The breadth, depth, and rapidity of transformation challenge the nature of community, religion, and leadership in contemporary society.

For most North Americans, and the majority of Jews among them, the bonds of community, critical to establishing collective identity and personal meaning grounded in relationships, have frayed. As these relations weaken, the yearning for personal and spiritual meaning assumes increased significance, for all groups of Americans, including that group in which most Jews fall—the educated, professionalized, middle and upper-middle class.

If community in general has been weakened, so too has organized religion in North America. Increasingly, religious adherents have adopted a more tentative, and frankly more consumerist, approach to their religious membership. Religious identities have become more fluid and less fixed, as Americans feel more comfortable changing their identities or even creating new combinations from several systems of belief and practice. In short, religious identity has become more privatized, personalized, idiosyncratic, and voluntary. Clearly, these trends pose challenges, if not dangers, to Judaism, especially its Conservative variety that stresses the enduring and contemporary importance of traditional norms, texts, practices, and beliefs.

At a time when community and religion are changing so rapidly, it comes as no surprise that the very concept of leadership in our society is also in flux. Emerging scholarship on leadership argues that the new forms of leadership need to be based on collaboration, personal reflection, and interpersonal skills in contrast to traditional, more authoritarian notions of leadership.

At just these points of cultural transformation, the importance of highly skilled and sophisticated religious leadership is all the more significant. We cannot alter the social realities that challenge us, but we can train leaders to respond effectively to them. We are convinced that these social imperatives require a vision for Conservative synagogue life built on the centrality of community as both the guardian of Jewish norms and as an important site for creating personal meaning. Inevitably, new skills and understanding of community, authority, teaching, and decision making will be required to develop an effective and visionary leadership for Conservative Judaism in the 21st century. These skills are not only

teachable, but in the process of teaching and learning them, an important cadre of leaders will emerge who will come to share a common vision of Conservative Judaism.

Current training at Conservative-oriented institutions of higher learning focuses on imparting extensive knowledge of traditional Jewish sources, as the *sine qua non* for assuming the position of a Jewish religious leader. The graduate school period is the last time to acquire mastery of Jewish texts in a sustained and intensive fashion. Furthermore, not all those within the academic halls of a rabbinical, cantorial, or education school are necessarily interested in serving as professionals of religious institutions after they complete their studies. Hence, continuing education in leadership skills—imparted to those in the field—is required to enhance religious leadership in the Conservative movement. When leaders have acquired some experience in the field, and faced genuine challenges to exercising leadership, they are more able to bring these experiences to bear on the learning process.

Conservative Jewish leaders are critically situated within the spectrum of Jewish religious leaders. They stand as ideological, social, and personal bridges between the other major denominations, all of which have a close historic connection with the Conservative movement. With a frequency greater than that experienced by other movements, Conservative leaders fill the leadership ranks of Jewish communal agencies, be they philanthropic, educational, fraternal, Zionist, or communal defense, thereby linking the vitality of American Judaism to the success of Conservative Judaism in training capable effective leaders.

We call for the establishment of a Conservative Jewish Religious Leadership Institute to train rabbis and other professionals, as well as lay leaders. In so doing, we draw on the critical strategies used by JTS over the past half-century to create effective religious leadership that best serves the Jewish people. The key task of these leaders is to create religious community—the foundation of Jewish life. We believe that the health and vitality of Conservative Jewish communities are essential also to the health and vitality of North American Jewry.

Since its founding in 1886, JTS has been dedicated to the training and formation of religious leaders. JTS focused initially on the preparation of rabbis and cantors, immersing students in the study of Jewish texts, with subsequent training programs expanding into the fields of religious education and Jewish communal service. The purview of JTS has been broadened to include not only professional congregational leadership, but also educators in formal and informal settings, and, with the recent expansion of List College, future lay leaders.

The Institute will draw upon new research on the nature of leadership and apply it to the distinctive needs of Conservative Jews as an innovative context for training leaders. At the same time, the Institute will undertake research about religious leadership to provide a critical understanding of Jews and their relationship to leaders. This programming and research will focus primarily, though not exclusively, on in-service professionals who have taken on, or are about to step into, major leadership positions. These two foci—professional leadership training and research—will constitute the primary work of the Institute.

### ***Mission and Objectives of the Institute***

The mission of the Institute is to enhance the quality of leadership of Conservative synagogues, schools, youth groups, camps, and allied institutions in the United States, Canada, and elsewhere. The Institute will draw on a broad range of pedagogical approaches to leadership. Its programs will include courses of a week to a month in duration, retreats, workshops, a mentoring system, distance learning, and the development of sophisticated information technology. At the outset it will specialize in identifying and training “emerging leaders”: those recently appointed to formal leadership positions.

Integral to its functioning will be basic and applied research in Jewish leadership development to improve the understanding of religious leadership in Jewish life and the effectiveness of the Institute’s programs in developing leadership. Research activity will include publications for both the scholarly and the professional worlds, and will embrace both intellectual and institutional dimensions. Research will be directed not merely at understanding issues, but also at positioning the Institute as a center for the production, distillation, and dissemination of advanced thinking on leadership and leadership education.

The Institute will function beyond in-service training by being a valued resource, advisor, and advocate of pre-service leadership training for the professional schools of JTS. This aspect of the Institute’s mission grows out of our conviction that future leaders, even at the pre-service level, need to develop a sense of their future leadership roles. The academic schools will need to incorporate a measure of the leadership skills and disposition, which the Institute will convey in greater depth. Furthermore, students in the rabbinical, cantorial and education schools need encouragement in internalizing the vision of Judaism and Jewish leadership conveyed by their schools.

The Institute seeks to produce Conservative Jewish lay and professional leaders who are:

## Jewish Religious Leadership Institute

- Committed to building well-functioning religious communities
- Committed to accessing and interpreting traditional Jewish texts, and making them meaningful and applicable to contemporary needs and circumstances
- Appreciative of collaborative styles of leadership, and capable of collaborating with Conservative leadership across the boundaries that currently separate laity, rabbis, cantors, educators, and institutions
- Reflective of their own performance as leaders, and able to view themselves openly and critically

In terms of the principal institutions of Conservative Judaism, the Institute seeks to

- Assist synagogues, schools, and other agencies in becoming more reflective, collaborative, better able to develop a vision, and committed to creative community-building
- Promote the ability to create a shared vision, commitment, language and practices among different leadership constituencies (for example, rabbis, laity, cantors, educators).
- Promote greater cooperation and more common purpose among the various institutions of Conservative Judaism (for example, congregations, schools, camps, men's clubs, sisterhoods).

## Founding Principles

Three founding principles form the basis for the Institute:

1. Community is central to Jewish leadership.
2. Collaborative leadership is needed in Jewish communities.
3. Text study is a prime resource for creating authentic models of Jewish leadership.

*These three principles make the Institute unique in its approach to leadership education.*

Principles #2 and #3 emerge from the first, i.e. community is central to Jewish leadership. This principle is obviously true to some extent for any group, Jewish or not, since by its very definition, leadership implies followers, and followers imply a group or community. In the Jewish world, however, community has a special resonance in that it is an end in itself; the community is not simply a means of organizing individuals to do the work of the group, but the entire Jewish community (*Klal Yisrael*) is a value in and of itself. Thus,

the centrality of community in the Institute is predicated on the value that we place on *Klal Yisrael*.

## **The Centrality of Community**

Much of the learning, teaching, discourse, and research of the Institute will focus upon the creation of religious community in the Conservative movement. This focus may be perceived as more relevant to congregations than to schools and other institutions in Conservative Judaism, but community building is certainly applicable to communities of students, teachers, parents, and allied institutions.

Thinking beyond community building in congregations, schools and other institutions, community building also links Conservative institutions to one another, to the rest of local organized Jewry, and to *Klal Yisrael*—the entire Jewish People.

While community building is important for American Jewry and all religious enterprises, it is especially critical to Conservative Judaism today in four respects:

1. Community as an agency for integration into Klal Yisrael,
2. Community as a guardian of the normative religious structure,
3. Community as the generator of specific religious norms,
4. Community as a source of personal meaning

### **Community as an Agency for Integration into Klal Yisrael**

*Klal Yisrael* (the Community of Israel) is a critical component in Conservative Judaism's understanding of the Jewish tradition. Chancellor Ismar Schorsch regards "an undiminished devotion to the ideal of *Klal Yisrael*" as a sacred value of the movement. *Klal Yisrael* represents Jewish people throughout the world, to whom Jews have a special relationship and special obligations. But *Klal Yisrael* also represents a concept—the notion that in addition to the many millions of people who are Jewish, there is an entity called the *Jewish People*. The entity has a history, a culture, a destiny, identifiable needs, and the moral authority to command our loyalty.

The local Jewish community institution integrates its members into both the real and ideal aspects of *Klal Yisrael*. First, the community is for members a main source for learning about the conditions and activities of Jews in other Jewish communities, be they neighboring synagogues and schools, other communities in North America, or Jewish communities elsewhere. Members have the opportunity to advance the interests of other Jews by mobilizing for rallies and demonstrations, writing letters and lobbying, volunteering, offering financial contributions. In so doing, the community not only promotes the participation of its

members within the larger Jewish community, it actualizes the notion of *Klal Yisrael* by translating what may have been a vague symbol or concept into a concrete reality.

The local community institution is, in a sense, a microcosm of *Klal Yisrael*. Membership in the community imposes certain obligations and responsibilities. For example, in addition to paying dues, members are expected to invest time and effort in advancing the interests of the synagogue or school, and in responding to the needs of other community members. The community provides services to individual members, such as religious, educational, recreational and pastoral services, and a place for meetings. The community also meets human needs for friendship, caring for others, and being cared for. Quite often, much of this caring and servicing takes place in sacred space (in the sanctuary) and at sacred time (prayer services), punctuated by rituals, ceremonies, and prayers that resonate with tradition. The intimacy felt within the community exceeds the intimacy of *Klal Yisrael*, just as the intimacy of the family exceeds that of the community. But each provides a model and a paradigm for the other.

The importance of community as an integrative agency for *Klal Yisrael* is not unique to the Conservative movement. Community is however, of special importance given the emphasis placed on *Klal Yisrael* by the Conservative movement.

Finally, strengthening community is especially important today as community bonds among American Jews decline, representing a major challenge to Jewish life. Conservative Judaism is critically situated in American Jewish life; one can hardly imagine a successful American Jewry that does not include, and is not strengthened by, a successful Conservative Jewry. Thus, the Conservative movement's success in building community will serve the Conservative movement and all of American Jewry, and will become a model and standard for other movements and organizations.

### **Community as the Model for and Guardian of the Normative Religious Structure**

Unlike Reconstructionist and Reform Judaism, Conservative Judaism affirms halakhic norms. In many instances its interpretation of these norms differs from that prevalent among Orthodox Jews. But the obligation of every Jew to observe Jewish law, the obligation that Chancellor Schorsch calls "the governance of Jewish life by halakha," is a core value of Conservative Judaism. For example, daily prayers, observing the Sabbath, maintaining dietary restrictions, or for that matter, ethical behavior toward others (non-Jews as well as Jews), are not matters of choice or, in the larger sense, subject to individual interpretation. So far as the Conservative movement is concerned, these are laws. In addition, assumptions rest at the heart of halakha about the environment in which these laws are to be observed.

However, most members of Conservative synagogues, and most parents whose children attend Conservative schools, do not observe many features of Jewish law, as clearly documented by both survey evidence and anecdotal observation. Some Conservative Jews are unaware of many requirements of the law, or of the detailed requirements connected with particular rituals. The core problem is that the environment in which observance of Jewish law becomes meaningful or compelling in one's life, is absent for many Conservative Jews. Jewish law is divorced from the routine affairs of the individual, making the observance seem peculiar, strange, and irrelevant. Finally, although we employ the term *law*, there are no sanctions connected to the violation of Jewish law within the Conservative movement.

In many ways the community is the ideal mechanism to meet these challenges. First, the community (whether school, synagogue, or otherwise) is usually a teaching community. It engages its members in ritual activity, in learning, and in acts of loving kindness (roughly parallel to *Avodah*, *Torah*, and *g'milut hasadim*). Conservative communities undertake such activities as *shabbatonim*, breakfasts, dinners, and holiday observances, which involve individuals and families in activities that make them aware of the existence of rituals and demonstrate the proper manner in which these rituals are observed. These are occasions for programmed or informal learning and they provide opportunities to engage individuals in caring for one another, in accordance with several precepts in Jewish law.

Second, the community makes ritual real and meaningful. Ritual is central to the life of the community. Members share the experience of participation in ritual. As the community assumes greater importance in the lives of its members, the rituals governing the life of the community and dictating its rhythms become both more important and more real, and even taken for granted. One lives one's life within the community by observing Jewish law.

Finally, the community becomes the guardian of Jewish law by virtue of the informal sanctions that it can impose, purposefully or not. Violating Jewish law becomes something that "isn't done," something that will offend the sensibilities of others, something for which one is embarrassed, something that may even lead to exclusion from the warmth and the caring of the community. On the other hand, in well-functioning communities, one can earn respect, prestige, and recognition through the performance of ritual, participation in Jewish learning, contributing to the life of the community, and acting in a caring and generous fashion toward others.

All of this suggests that one surrenders a portion of one's individual autonomy for membership in the community. This is true, just as it is true of membership in a family. Ideally, community members will no more resent the surrender of individual autonomy to the

community than do family members resent the surrender of individual autonomy to the family.

### **Community as the Generator of Specific Religious Norms**

The Conservative movement affirms the evolving nature of Jewish law. It is aware of the need to maintain a delicate balance between fidelity to the norms and mores of the tradition and the need for innovation, if only to meet the challenges posed by political, economic, social and cultural changes. The conscious recognition and the painful awareness that there is no simple formula for maintaining the balance between tradition and change, are distinguishing characteristics of the Conservative movement.

Who decides when tradition must give way? Who decides how significant or insignificant an aspect of the tradition must be before it can be modified? Who decides what the appropriate innovation is to be? These questions engage the entire Conservative movement—from the individual synagogue member on one hand, to the experts in religious law at JTS or the Committee on Jewish Law and Standards of the Rabbinical Assembly on the other. While the Conservative movement offers no simple answer as to where ultimate authority rests, it is clear that among the major sources of authority is the community—the synagogue community in particular. This too is ingrained in the ideology of the Conservative movement, which has always stressed the authority of the Jewish people. The Conservative movement harbors the notion that the masses of Jews, expressing their Judaism in a synagogue framework, constitute an important voice in decisions about the balance between tradition and innovation and in decisions concerning the nature of innovations.

Within the parameters established by the Conservative movement, there is not only room, but also a necessity, for local communities to adapt and adjust the vision of Conservative Judaism to local exigencies and propensities. The local community offers the ideal setting for experimentation and innovation, albeit within an environment committed to tradition, authenticity, continuity, and meaningfulness.

### **Community as a Source of Personal Meaning**

Community is an important source of meaning in an age when individuals search for meaning, both inside and outside a religious framework. The community provides a sense of order to both individuals and families, with its public norms, rituals and ceremonies, with its calendar of public events, and its support and participation in the individual's private events. The community becomes both audience and participant in public and private celebrations, sharing in the moments of joy and sadness that give essential meaning to our lives. This

function becomes even more important with the decline of larger public institutions, the state in particular, as sources of meaning or identity.

These conceptions of community as the agency for integration into Klal Yisrael, as the guardian of the normative religious structure, as the generator of specific religious norms, and as a source of personal meaning, will become essential components of the Institute's courses, with this central theme woven into all of its distinct offerings. Understanding the centrality of community to Conservative Judaism, and the multiplicity of functions it plays within a Conservative context, will be invaluable for emerging movement leaders.

## **Collaborative and Shared Leadership**

The imperatives of community are central to the development and training of leadership. We offer a vision of leadership that will facilitate this orientation to community by expanding the traditional hierarchical leadership model and focusing our programming on a more collaborative leadership style that is more effective at nurturing and sustaining community. Along with leaders in corporations, schools, houses of worship, voluntary associations, and other organizations throughout society, many Conservative religious leaders now understand their leadership as constituting a shared enterprise of lay and professional leaders, and of leaders and followers.

The Institute will examine both vertical and horizontal approaches to leadership. It will serve all those who play central leadership roles in the community—professional leaders and lay leaders—and will promote an understanding of religious institutional leadership that views volunteers and professionals as partners. Professional and lay leaders, working separately and together, will share their respective insights about their roles and the material they will study, and will explore both the difficulties and benefits in collaborating as partners in leadership. This culture of partnership will allow participants to transcend the divisions within the Movement and facilitate cross-institutional conversations.

Collaborative practice as a leadership model is highly effective from a number of perspectives. Religious leaders who take this notion seriously can promote a much stronger lay and professional commitment, for the willingness of congregants, faculty members and other professionals to take on more responsibility and to push themselves to achieve higher levels of professional effectiveness is directly related to collegiality. Collegiality gives people increased responsibility, thereby empowering them and enabling them to use their own potential to attain greater levels of achievement. Thus, by fostering collaboration and strengthening others, a leader's credibility and influence increases amongst others in the

organization. A leader needs to create an institutional culture that supports the increased demands placed upon members of the organization. In a collegial environment, the demands on the leader for top-down decision making and authority can be drastically reduced. It becomes part of the everyday expression of lay and professional workers. The value of collaboration is apparent at multiple levels in an organization, and can increase the effectiveness of one's leadership while decreasing the demands on the leader. This shared and collaborative style of leadership enables religious leaders to find greater success at less personal cost and risk, than hierarchical leadership styles.

## **Jewish Texts and Leadership Learning**

While it is clear that collaborative leadership grows naturally out of a commitment to community, perhaps it is less obvious how text study is connected to community. Imagine a vertical axis and a horizontal axis. To build a rich and layered notion of community, one must communicate on both axes. Collaborative leadership allows us to build community across a horizontal axis, bringing together diverse groups to work together on particular projects. Text study, on the other hand, allows Jewish leaders to build community along the vertical axis, that is, to be in dialogue with our collective past and future. Jewish texts record the conversations of leaders throughout the generations. The design of a page of Talmud is such that community is built along the vertical axis of time, and we are able to speak with our ancestors and glean their wisdom. In addition, text study encourages future generations to be in dialogue with us, and to remind us that our words and actions will be used by them as part of an ongoing conversation.

The Jewish tradition places enormous importance on sacred text as the fountainhead of all authority. The texts include both the written and oral law, and the many interpretations, commentaries and homilies on that law. The Conservative movement's special contribution has been its emphasis on Jewish history as a source for understanding the nature of Judaism. Within Conservative Judaism, historical texts have become a source of authority. The Conservative movement has also broadened the traditional understanding of Jewish civilization to encompass literary formulations which, while lacking the authority of sacred text, provide insights into the Jewish understanding of what it means to be a Jew and the Jews' responsibilities toward God and their fellow human beings.

Conservative Jewish leaders share a commitment to text study as a sacred activity, viewing it as the fulfillment of a religious commandment and responsibility, and as a vital

way to enrich their personal lives. Text study provides insights into how we are to behave, and the authority of the text empowers us to behave in accordance with its prescriptions.

We see the study of sacred text as a critical component to the Institute’s educational activity. Given their advanced training in text, we believe that rabbis will appreciate and benefit from the opportunity to study texts with their colleagues as they pursue their leadership studies. We also see the value of bringing together emerging Conservative Jewish leaders from all sectors and backgrounds—both lay and professional—in the highly-valued Jewish activity of text study, deriving lessons for leadership, and forging powerful ties to one another.

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## EDUCATIONAL PHILOSOPHY

### Can Leadership Be Taught?

Since the turn of the twentieth century, philosophers and scientists have debated the question: “Is leadership a trait that is inborn or is it an ability that can be developed?” Today, after many years of research, an almost universal consensus has emerged that leadership *can* be taught. Indeed, more than 900 graduate programs of leadership training and countless programs of continuing education in leadership development are currently in operation in North America at this time.

The concept of leadership itself has also evolved. No longer focusing on “charisma,” the new definition sees leadership as an expertise comprising a spectrum of skills that can be learned. Leadership is based on theoretical knowledge plus a specific set of abilities, such as communication or listening, that can be cultivated and honed.

Looking at pre-service and in-service education programs in leadership development, we can see a wide variety of approaches. As stated earlier, the Institute will focus on in-service education, with the expectation that its work will also impact on JTS’s pre-service training programs.

### *Contemporary Leadership Development Programs*

While leadership development programs vary, they do share certain common features. Despite differences of emphasis and different philosophies about the nature of leadership itself, four curricular focal points are found in many contemporary leadership development programs:

- Vision
- Knowledge
- Skills
- Disposition.

Looking at these four areas in light of the Institute’s mission and “Founding Principles,” we can imagine the Institute’s curriculum. The Institute would by necessity focus on areas most appropriate to its clientele’s needs and most congruent with the strengths and commitments of JTS as a whole. Hence, not all of the elements below would be offered at the Institute, although participants would be encouraged to seek help elsewhere for certain specific topics:

#### **Vision**

The Vision component helps participants learn about conceptualizing, articulating and implementing a vision within a Conservative Jewish framework. What can Jewish

philosophy and the writings of the Jewish tradition have to offer in the way of vision for contemporary leadership education? How do we go about “translating” philosophy into practice? What models from the Jewish past can be explored to help us understand the nature of vision and its realization in practice?

## **Knowledge**

Knowledge overlaps with skills (for example, one needs knowledge about supervision in order to do supervision), but here the curricular focus is more on theory. While different settings require different kinds of specialized knowledge, some knowledge is common to leaders in all institutional sectors of Conservative Judaism

First, “knowledge” will include learning about the theoretical literature on leadership and leadership training, such as those works mentioned earlier. Second, participants will gain knowledge about translating theory into practice. If, when learning about the theoretical literature, we ask the question: “What under-girds the work we are doing?” in the next component of the curriculum, we must ask: “How can we implement what the literature teaches us?” We will look at topics from the point of view of both current practice and theory, and examine successes and failures in these areas. Participants will need to study examples of “best practices” in the world of leadership and in the specific domains of existing Jewish institutions.

Third, the curricular focus on Jewish knowledge will be tailored to the specific strengths and weaknesses of program participants. The Institute will emphasize areas from Jewish history and Jewish religious texts that focus on leadership and upon the dilemmas leaders will encounter in their work. (See “Jewish text study” below.)

Fourth, because the Institute is aimed at *Conservative* Jewish leadership, participants need to gain knowledge about the Conservative movement and its vision of Judaism. One aspect of the curriculum, therefore, will be studying Conservative Jewish ideology, history and practices.

Finally, because of the emphasis on *community* as a core element of the thinking behind the Institute, participants will study this topic in depth. The Founding Principles delineate four different aspects of the importance of community:

1. Community as an agency for integration into Klal Yisrael,
2. Community as a guardian of the normative religious structure,
3. Community as the generator of specific religious norms,
4. Community as a source of personal meaning.

Each of these aspects can easily serve as a core curricular unit of study.

**Skills**

All leadership programs recognize that participants need to learn a certain set of leadership skills. These might include technical skills like budgeting, accounting, and technology usage, or more complex matters such as problem solving, negotiation skills, and the skills of working with teams or supervising employees.

Some skills are particularly relevant to the specific settings within which participants work, meaning that the Institute would need to offer differentiated skills programming for the different domains of Jewish religious leadership. While there would be overlap, congregational rabbis and cantors, school principals, and directors of Jewish camps would need to learn different skills relevant to the special features of their work venues. Approaches such as hands-on work and Problem-based Learning would be used to initiate the participants into the real-life issues they will face as religious leaders.

Clearly, the strong emphasis on collaborative and shared leadership will require a particular skill set, and learning activities in the Institute will help participants gain those specific leadership skills. Participants will have opportunities to work in teams, to encounter leaders from different domains, and to simulate real-life examples of collaborative leadership. Since participants will be in leadership positions as they enter the program, the Institute will be able to take advantage of cases from their current work situations. Participants will be asked to prepare cases to share with others; the Institute will engage faculty to write up cases, thus developing over time a resource bank of cases for the Institute, in the manner of institutions like the Harvard Business School.

**Disposition**

Leaders require certain personal qualities, including ethical commitments encompassing values, ideals, and inspirational qualities. Because the Institute aims at preparing *religious* leaders, the spiritual dimension of leadership is particularly important. Institute participants will grapple with matters of religious faith and practice, and will “find their own Jewish voice within the Movement” through personal reflection and by relating the materials studied in the classes to their own individual lives.

This dimension of the Institute will allow for experiential programs such as retreats and *Shabbatonim* to create an environment where these matters can be explored in ways different from conventional courses. The program must touch the souls of those who come. Those who lead others in their professional religious lives need a periodic infusion of spirit, Torah, and the presence of God in their own lives. Our program will find ways—through

music, art, prayer, and the experience of being together—that extend beyond an academic and interpersonal experience and remain a spiritual experience.

### ***Jewish Text Study***

Jewish text study will play a central role in all of the curricular streams mentioned above, superimposed on each area. Although the Conservative movement tends to place special importance on the classics of rabbinic Judaism such as Talmud, Midrash, and Jewish legal (*halakhic*) literature, Conservative Judaism and JTS have always stressed the continuity and importance of the Jewish textual tradition throughout Jewish history. Institute participants will study rabbinic sources like Talmud along with biblical studies, modern Hebrew literature, writings of the Musar (Ethical) movement of the 19<sup>th</sup> century, and historical documents from a variety of communities and locales.

Let us look at scenarios of how text study will impact upon the Institute’s curricular focal points.

- In the “skills” domain, participants will explore the ways that Jewish teachings about ethics and work should influence matters of hiring and firing, evaluation of employees and workplace environment.
- In the “knowledge” arena, they will try to discern examples of leadership theory implicit in various historical events and personalities within Jewish history, looking at primary sources and secondary literature (such as that which emerged from the two leadership conferences sponsored by the Lilly grant).
- What does the Jewish tradition teach us about the character of a good religious leader? What does it mean to be a spiritual leader? These questions bring us to the area of “disposition.” Traditional rabbinic teachings about matters of the spirit will help frame our discussions and will challenge participants toward personal growth. Examples from Jewish history and legend will form the basis of debate and reflection.
- In the area of “vision” participants will examine competing visions of successful Jewish community by studying Jewish texts and other sources.

### **What Constitutes Good In-service Education?**

With its focus on in-service programs, the Institute will take advantage of the best thinking from contemporary education about the most effective approaches to good professional development. These approaches include some of the following principles both

in terms of the content of professional development and the way that such programs need to be structured.

The content of professional development should be:

1. **Experiential, concrete.** Although theory plays an important role in professional development, research indicates that programs—particularly leadership programs that assume a high level of experience among the students—need to be both experiential and related to the real-world situations of participants. This concept also suggests educational techniques that might be most effective, such as case study and action research (with the participants being “researchers” themselves).
2. **Grounded in inquiry, reflection; driven or led by the participants themselves.** The program must draw upon the strengths and experiences of the participants. Participants must take responsibility for leading aspects of the program and for using this opportunity to think reflectively about their current work.
3. **Collaborative.** Professional development involves a sharing of knowledge among the educators in the program. It assumes that group work is an important element of the educational practice.

The structure of good professional development must be:

- Sustained, not given in one-shot workshops.
- Systematic, not a hodgepodge of unconnected events.
- Differentiated, according to experience and roles of participants.
- Supported by mentoring, modeling and coaching.
- Connected to other aspects of school or institutional change.

### ***A Time for Reflection***

A key component of the Institute—rarely available elsewhere—will be the opportunity for participants to reflect on their work experience. Leaders are busy people, often fully immersed in their congregations, schools or organizations. They have little time to spend reflecting on their work because there is so much to do. The Institute will create a space for participants to contemplate their lives, their careers, their work, what they would like to see sustained and what they would like to see changed.

### ***Mentoring***

The research on leadership development points to the importance of mentoring experiences as central to the cultivation and growth of leadership. In the religious arena

where issues of authority, norms, and communal responsibility are front and center, mentors—experienced leaders, committed to the preparation of future leaders—are essential to the Institute. Successful leadership programs need to include a mentoring component to help participants integrate what they have learned and implement new ideas in their work settings. The Institute is committed to incorporating a mentoring dimension into its program. Successful religious leaders from a variety of settings within the Conservative Movement will serve as mentors for Institute participants. The mentors will meet with program participants and be in regular communication through e-mail and telephone. Mentors will serve as sounding boards about the participants’ experiences in the program and the ways in which the participants are integrating their training into their work. Mentees will visit the mentors and “shadow” them. In addition, participants will each work on individual projects under the supervision of their mentors as a way of seeing how ideas from the program can be realized in real-life settings.

The research arm of the Institute will focus on various aspects of mentoring and its impact on leadership development. Questions to be examined will include: What are the qualities of an effective mentor specific to religious leadership? Are there times along the professional pathways of religious leaders when mentorship is particularly beneficial? What and how do demographic and personality factors (e.g. gender, age, professional responsibilities) affect mentoring relationships?

## PROGRAMMING

In the Founding Principles of the Institute we identified three core principles essential to our view of preparing educational leaders:

- An emphasis on community
- A focus on collaborative leadership
- A commitment to the use of Jewish texts (broadly defined) in the learning experiences offered by the Institute.

These three core principles will be embedded in *all* of the Institute’s educational offerings, for all programs and with different populations—rabbis, cantors, educators, lay leaders.

At the same time we identified (in Educational Philosophy) four “curricular focal points” that organize the Institute’s educational program:

- Vision
- Knowledge
- Skills
- Disposition.

Unlike the three core principles, these curricular focal points will be *distributed among* the Institute’s educational offerings, with some courses or modules emphasizing particular elements and others highlighting different ones. One course, for example, may stress knowledge, another course may touch upon skills and vision, while a third might focus on disposition, perhaps through journal writing or mentoring. The overall program for each participant will be designed in such a way as to give a combination of these foci appropriate to the particular needs of the individual student and the faculty’s overall conception of the program.

The chart on the following page indicates a number of potential course titles and the various curricular focal points these courses would address. In the first column are listed the various courses titles or modules offered by the Institute. In the next column, the participant population envisioned for that particular course or module—typically, courses for rabbis, lay leaders, cantors, educators—are indicated. Initially, we envision three program tracks serving each of the participant populations: a rabbinic track, a lay leader track, and, if funding allows, a track for day and supplementary school heads. Each subsequent column represents a different curricular focal point, as noted above.

In the pages following the chart a description of each track and an overview of the suggested courses for each track are provided. We offer these ideas in a tentative and illustrative manner. We are fully aware that circumstances, opportunities, and the professional staff will shape the design of the actual programs.

**Educational Offerings of the Institute**

<b>Course or Module</b>	<b>Track</b>	<b>Skills</b>	<b>Knowledge</b>	<b>Disposition</b>	<b>Vision</b>
Envisioning Community: The Art of Managing Communities	Rabbis	✓			✓
Collaborative Leadership	Rabbis	✓	✓		
Know Thyself	Rabbis	✓		✓	
Challenges of the Conservative Movement	Lay Leaders	✓	✓		
Board Development in Synagogues and Schools	Lay Leaders	✓			✓
New Trends in Contemporary American Jewish Identity	Lay Leaders		✓		✓
The Day School Head and the Board President	School Principals	✓		✓	
Negotiating the Demands of Headship	School Principals	✓		✓	
Comprehensive Course for Supplementary School Leaders	Supplemental School Principals	✓	✓	✓	✓

**Rabbinic Track**

Our deliberations have underscored the importance of building Conservative religious communities and of the commensurate importance of producing a lay and professional leadership committed to, and capable of doing so. In this context, we were especially concerned to learn of how congregational rabbis and leaders understand the roles and demands upon rabbis today. Both rabbis and their lay leaders place significant value upon teaching, pastoral functions, and leading congregational worship. At the same time, they placed relatively little emphasis on several functions and activities connected with community-building and institutional leadership. These include staff supervision, administration, conflict-resolution, and fund-raising. Moreover, rabbis claimed to be spending relatively little time in these activities.

Other survey evidence demonstrated the importance of commitment to community-building roles and activities. Those rabbis who reported relatively higher levels of interest in and commitment to community-leadership functions also reported higher levels of morale and shared vision in their congregations. These findings only further underscore our contention that community-leadership commitment, skills, and orientation need to be taught, both to rabbis, and other leaders of Conservative institutions.

Learning experiences offered to rabbis will be informed by the critical elements of the educational philosophy outlined in the previous section of this report. We anticipate that recruitment will focus on “emerging leadership,” that the learning experience will draw upon the study of Jewish texts, that it will emphasize the use of case studies and actual experience in the field, and that the approach to leadership training will emphasize collaboration, deliberation, and reflective practice.

Below are some themes and topics that could form the substantive core of courses and modules for the rabbinic track. These themes and topics are applicable to courses of varying lengths, settings, and venues.

### **1. Envisioning Community: Managing Communities as Social Systems**

Our research has shown that the importance of formulating and projecting a shared vision of community is widely recognized. At the same time, both this research and the experience of the Rabbinical Assembly’s in-service programs, demonstrate that rabbis have a greater comfort level with tending to the needs of individuals rather than with operating as leaders of complex social systems. Rabbis themselves, however, recognize the benefits of approaching their institutions as systems, rather than as simple aggregations of individuals.

In the 21<sup>st</sup> century the Jewish community continues to erode. Jews are increasingly drawn to suburbs disconnected from a central city, in areas housing smaller percentages of Jewish neighbors. These geographic and demographic realities, documented in studies such as the Metro West (New Jersey Federation’s 1999 demographic study), suggest that the synagogue and its leaders are pressured to replace the organic communities of old with intentional Jewish communities.

Six themes that would serve as the core of an effective program for rabbis on envisioning community are:

1. Creating and nurturing small group development as a microcosm of the larger community
2. Understanding the congregation as a system

3. Creating a shared vision of the congregation as part of Klal Yisrael
4. The empowerment of lay people to help create and sustain community
5. Servant leadership: How do we serve the community more effectively?
6. Conflict management.

The themes will be introduced with Jewish texts and then juxtaposed with case studies. Six modules would be spread over a two-days to maximize participants' understanding of the synergies between these interrelated skills.

## **2. Collaborative Leadership: Working with Lay Boards**

More than ever before, the successful functioning of religious communities depends on effective teamwork among professionals (in various capacities) and lay leadership. In this context, perhaps no relationship is as crucial as that between rabbis and their lay boards and officers. Our research underscored the different expectations that rabbis and lay leaders have of each other, and how they understand their different concerns and commitments. In addition, changes in the Conservative rabbi's authority (against a background of changes in the authority of clergy in general) present new challenges to rabbis, lay leaders, and congregants.

Through the use of research, case studies, examples from the field, and theoretical work on collaborative leadership, this theme would focus on the rabbi-lay leader relationship. Such areas as role clarification, governance, management, and developing a shared vision will be included.

## **3. Reflective Practice – Managing Personal Resources for Effective Performance**

The demands and responsibilities of professional religious leaders of Conservative congregations and other institutions are often quite onerous and taxing. These jobs demand significant time commitment, require very broad skill sets made worse by the very public nature of the role. Successful rabbis (and other clergy) manage to draw upon such personal resources as close friends, family, colleagues, former teachers, and trusted congregational leaders. This theme also touches upon the broader area of self-management, such as setting priorities, defining success, resolving tensions, and negotiating boundaries.

## **Lay Leaders' Track**

The research on leadership development programs for Jewish lay leaders highlighted both the wide variety of such programs, and some critical elements of success. Common to successful programs is their ability to convey to participants the sense that they constitute a very special group of people with distinctive talents and special responsibilities. The Institute would be wise to emulate these programs and build in a good measure of selectivity to convey the importance and privilege of participating in its learning experiences.

Current synagogue and USCJ leadership programs emphasize the acquisition of synagogue skills and liturgical leadership abilities. While critical, we do not foresee these areas being central to the Institute and its evolving culture and emphases. Rather, we believe that some of the courses for lay leaders can and should overlap with those offered in other tracks. In addition, there will be instances where rabbis (or other professionals) and lay leaders devote segments of their course work to joint study around common themes and issues.

Beyond these suggestions, we offer the following topics as illustrative of the sort that may be offered by the Institute.

### **1. Building a Culture of Contemporary Conservative Judaism**

Conservative Judaism presents a fairly complex and sophisticated challenge to understand, let alone to lead. As a movement ideologically situated between the two other large denominations in American Judaism (Orthodoxy and Reform), Conservatism faces the problem of carving out a meaningful centrist position, while being challenged from both the left and the right. How to fashion a compelling message, how to maintain an ideological market niche, and how to bridge the gap between traditional Jewish teachings and contemporary Jewish life remain enduring and difficult challenges for Conservative leadership. If lay people are to work effectively with their rabbis (who have spent years learning and thinking about such issues), they need to gain more exposure to these concerns and the ways in which Conservative Jewish leaders and institutions have addressed them. In this topic the development of the Conservative Movement from historical, *halachic* and institutional perspectives will be explored, with readings from some of the early thinkers and documents that have led us to the present time. We will focus on the moments when Conservative leaders had to take strong stands to lead the Movement in a particular direction (i.e., the creation of JTS, the ordination of women, the relationship between JTS and its partner seminaries around the world). The course will also address the leadership issue of

cultural change (i.e., fashioning a compelling message, maintaining an ideological market niche, bridging the gap between traditional Jewish teachings and contemporary Jewish life). Participants will share how these issues are expressed in their own synagogues and schools.

## **2. New Trends in Contemporary American Jewish Identity**

Religious life in American society continues to undergo rapid and sweeping changes, many of which are reflected among American Jews, including those in Conservative congregations. Jews, like others, are exhibiting increasingly idiosyncratic configurations of Jewish identity. Religious individualism, privatization, and the phenomenon of “personalism” characterize an increasing number of Jews—Conservative and otherwise. Effective lay leadership in Conservative congregations needs to recognize and come to grips with these trends. Congregations embrace more wide-ranging styles and tastes, and congregants may demand individually-tailored approaches in congregational life. This course will address the changing varieties of Conservative Jews and their implications for practice, policy, programming and leadership.

Based on the Task Force’s research and experience, the best format for these courses is a multi-day retreat. Retreats offer opportunities for intense learning of content and experiential moments to share prayer and ritual. Ideally, the retreat would consist of a combination of knowledge- and skills-based courses, along with opportunities for networking and group bonding through case study and reflective exercises.

## **3. Board Development**

Boards are crucial tools for leading any institution; non-profit organizations have particular challenges which will be addressed in this course, including:

- The distinction between governance and management
- Committee work and board work
- Special interests and universal good
- Having a clear mission.

In addition, a skills-development segment of the course will include:

- Running effective meetings
- Public speaking
- Developing financial resources
- Marketing and communicating with the media
- Managing change
- Creating and implementing a vision

- Building effective teams
- Grooming a successor
- Resolving and utilizing conflict.

Key themes will include:

- Creating effective partnerships
- Developing a common vision
- Developing collaborative relationships
- Role clarification.

Case studies will play a key role in this course, as will exercises to clarify vision and values.

## **Educators' Track**

Our research findings on Jewish educational leadership development programs highlight both the limited variety of such programs, and the critical elements of success of those that do exist. Common to the few successful programs is a strong apprenticeship component utilizing experienced school heads as staff member/mentors. In addition, successful programs empower the program manager to be highly selective with regard to participants. As is the case with the lay programming, a good measure of selectivity would be valuable in creating a highly effective professional development experience.

The Educators' track will address a broad range of professions; day school heads, supplemental school leaders, synagogue educators, camp directors, Hillel and JCC leaders all fall within the purview of the Institute. We recommend that initially the Institute focus on day and supplementary school leadership programming, and broaden the range of professions as experience is gained.

The following course topics are illustrative of Institute offerings for the Educator's track:

### **1. The Day School Head and the Board President**

The relationship between an effective school head and board president is characterized in the leadership literature as a partnership. While there is no relationship that holds more significance for a day school head, it is often the most stressful challenge for school heads to manage. With an average term length of two years, the board president's term is often finished just as the relationship with the school head begins to gel. Research suggests that school heads and lay leaders often have somewhat different expectations of each other, and

different visions of their respective jobs and roles. By bringing together veteran school heads with particular skills and expertise in cultivating and nurturing healthy head-president relations, we can offer substantive training for new day school leaders. Such issues as role clarification, developing a shared vision, governance and management will all be included in this program.

## **2. Negotiating the Demands of Headship**

The demands and responsibilities of functioning as the lead professional in a Jewish day school are often overwhelming. An average day for a school head begins in the office by 7:00 a.m. and often ends after 10:00 p.m. when board and committee meetings conclude. In addition, for those that work and live in the same community, Shabbat is no respite as parents and community members take advantage of opportunities in synagogue to address pressing concerns. With sporting and other cultural events frequently scheduled for Sundays, there are months that go by during which school heads might have little break from the demands of the job. Even outside of these formal settings, school heads are usually regarded by many in the community as religious role models, with all of the expectations that such a label implies. Organizing and prioritizing time, learning to protect personal time and developing supportive networks of friends and professionals are crucial and often invaluable skills for school heads. Longevity in the job is directly related to their relative strengths in these areas.

This course would offer substantive tools for organizing time, both professional and personal. It would utilize the techniques and strategies developed by those who excel in this profession and remain passionately committed to it in spite of these demands. As with programming for rabbis, the course would also touch on the broader area of self-management as religious leader. Such issues as setting priorities, defining success, resolving tensions, and negotiating boundaries would be analyzed from the perspective of professionals who have not always anticipated such communal expectations and perceptions.

## **3. A Comprehensive Program for New Supplemental School Heads**

The most prevalent form of Jewish education in the United States is congregational or supplementary school programs. Nationally upwards of 70% of all Jewish children who participate in Jewish education are enrolled in these programs from three to six hours per week. Whereas the teachers are part-time the directors of these programs are full-time. Currently there are no institutes or centers devoted specifically to leaders of congregational programs.

This leadership program would target outstanding new supplementary school leaders. Our research suggests that their continuing education needs fall into the following areas:

- Staff development and supervision
- Curriculum
- Building a vision that complements the realities of Conservative Jewish life in a pluralistic and open society
- The recruitment, training and retention of teachers.

The course would focus on the following three areas:

1. Instructional Leadership: Curriculum development, assessment; professional development; teacher supervision; school and faculty culture.
2. Organizational Leadership: Organizational development and the process of change; the leader's role and the development of frames of leadership and their application to different contexts.
3. Integration: A Jewish worldview informed by educational theory, practice, knowledge of human development used to strengthen Conservative Jewish communities, as well as individuals' knowledge and commitment.

## **RESEARCH: RATIONALE & PROGRAMMING**

Studies of leadership and management have been widely conducted in the larger society. Much can be learned from this research, particularly about conceptualization, research tools, and relevant theory. However, the applicability and transferability of this research to the Jewish world, let alone the specifically Conservative arena, is dubious. Much remains to be learned about Conservative religious leadership, and research will be a necessary component of any leadership institute that aspires to effectiveness and excellence. We believe that while religious leadership resembles all leadership, it does present unique challenges. Moreover, those challenges are in some ways different for Jews than for Christians, and different for Conservative Judaism as opposed to Reform and Orthodoxy.

We see the function of research as extending beyond providing the necessary knowledge base to launch and conduct the Institute or to evaluate its functioning and impact. Any consideration of the uses and importance of social research in this setting must begin with an appreciation for the social or institutional uses of research. Research on Conservative Jewish leadership will advance understanding, broaden horizons, and clarify concepts. In particular, social scientific research on Conservative Jewish leadership conducted by or for the Institute has the potential to achieve the following:

1. Creates relationships. It can engender productive ties between the Institute and important external parties.
2. Research sets agendas. It can serve to highlight certain challenges and effective responses to them, thereby affecting the thinking of communal agencies, training institutions, academia, and philanthropic foundations.
3. Research shapes ideas and stimulates dialogue. It can influence the very concepts and understanding of Jewish leadership generally, and of Conservative religious leadership, in particular.
4. Research brings recognition. It can contribute to the prestige, visibility, reputation, and ultimately the effectiveness of the Institute.

Achieving these objectives should be part and parcel of the formulation, planning, initiation, execution, and delivery of the research. The research product itself is only the centerpiece of a package of activities that extend beyond the purely intellectual dimensions of the research.

What might a research agenda for the Institute look like? The research arm will undertake institutionally-oriented research (or what some might call “evaluation research”). In this context we would be interested in learning about the functioning of the Institute, embracing such issues as:

- Marketing and student recruitment
- Curricular planning
- Effectiveness of administration
- Nature and quality of educational staff
- Client satisfaction
- Assessment of learning
- Eventual impact upon leadership as demonstrated by the positions assumed and the quality of performance as leaders.

Ultimately, we hope the Institute will result in the recruitment of new and better leaders, the advancement of emerging leaders into new and more consequential areas of responsibility, and more effective leadership—both individually and collectively. Institutional research would examine the extent to which, the manner in which, and the conditions under which these objectives are being met.

To illustrate the more expansive agenda of the research unit, we suggest several broad topics:

1. The antecedents to Conservative religious leadership.
2. The conduct and functioning of that leadership.
3. The training and nurturing of that leadership.
4. The effectiveness of that leadership.
5. The Conservative religious community, as the principal arena for that leadership.

These topics are discussed below.

### ***Antecedents to Leadership***

This area of research would examine the mechanisms of recruitment, socio-demographic and Jewish characteristics of leaders, and preparation and early development of Conservative Jewish leaders in the following areas:

- Parental Jewish background
- Childhood Jewish education
- Early synagogue experiences
- Adolescent Jewish experiences (camp, youth group, Israel, etc.)

- The university years and beyond
- Formal and informal training, social networks
- Methods of recruitment.

It could examine the leaders' Jewish development and leadership trajectory. When did they experience periods of engagement or disengagement in their Jewish commitment and in their leadership involvement? How does one sort of leadership activity flow into another? What background experiences and characteristics are associated with certain types of leadership involvement? Are we recruiting broadly enough.

The practical implications of this sort of research would address questions of recruitment, helping us to understand how to expand the pool of potential leaders. The concern with identifying, recruiting and nurturing leaders is widespread, and this research would connect with research in other domains on similar issues. The research would also have implications for training programs. We could learn about what preparations Conservative Jewish leaders bring to their functioning in terms of Jewish background, leadership skills, and leadership persona. Such information and analyses should help guide the content, form, and marketing of the Institute's programs.

### ***Functioning of Leadership***

We have little systematic knowledge about the tasks and challenges of leadership. What does the Conservative rabbi, educator, or board member actually do? What are the different models of functioning and success within each area? What skills do they employ and when? What motivation, commitment, vision, and personality do they bring to their jobs as religious leaders? How do they mobilize resources? How do they function in the interpersonal realm? Where do they experience success and where do they feel especially frustrated?

Of particular relevance are relationships that cross boundaries, for examples those between professionals and volunteers (e.g., rabbi and synagogue officers), those among institutions within the Conservative movement (e.g., synagogue and school), and those between Conservative institutions and other Jewish agencies (e.g., federations, JCCs). These relationships, tend to be fraught with competition, tension, and misunderstanding. Studies of leadership in the corporate world have been animated by questions of shared leadership, partnership, and alliances. These questions have been a constant source of concern for American Jewish communal leadership where tensions between professionals and laity, and between congregations and other institutions, are common, if not ubiquitous.

Another critical question, especially important to the functioning of Conservative religious leadership, concerns authority. How do and should contemporary Conservative leaders exercise authority? How can they effect a bridge between traditional bases for authority and the religious individualism of North Americans in general, and Jews, and Conservative Jews in particular? These issues come into sharp relief in the relationship between Conservative Jews and sacred text. The study of Torah and rabbinic teachings has become critically important in the lives of Conservative Jews, their communities, and their religious leadership. How these Jews understand the authority of the text, how their rabbis interpret these texts, and how the communities develop norms, boundaries, and sanctions in negotiation with their members and these texts, remain issues demanding attention.

This area of research has direct implications for leadership training. It would help faculty (and students) focus their attention on current issues and challenges, and would provide fascinating case material for teaching and discussion. More broadly, the research could inform leadership of the most pressing concerns, and generate effective responses in a pointed fashion.

### ***Training of Leadership***

How are leaders trained and what training is most effective, for which leaders, under which circumstances, and in what fashion? These questions will be examined as part of the ongoing evaluative research component of the Institute's own functioning, but they extend to other domains as well. In one way or another, Conservative Jewish leaders are being trained, socialized, and educated. We need to learn about the extent and nature of these experiences and the sorts of consequences they engender, especially in comparison with those of the Institute itself. We are interested in the impact of training experiences at the Leadership Institute and elsewhere. What happens to individuals after they complete their period of formal training? Do they advance their leadership involvement, contribution, and success? In addition, we need to know more about both pre-service and in-service opportunities for leadership recruitment, training, and development. What programs currently serve today's leaders? Where have these programs been successful, and where less so? This area of research would embrace "evaluation," in the traditional and narrow sense, but extend beyond the conventional confines of customary evaluation studies.

### ***Impact of Leadership***

Distinctive, if not unique, to religious leadership is the building of community. Accordingly, the research arm of the Institute should study the effectiveness of leadership in

building communities in a way that is sensitive to the distinctive religious dimension of Conservative lay and professional leadership. In the broadest of terms, it will ask: Why and how does good Conservative Jewish leadership matter? We will need to develop concepts and measures of institutional success and leadership success to explore the relationship between the two. For example, when and how does “good” synagogue leadership promote stronger communities, growing membership, volunteering, donations, learning, participation in services and in all other activities, commitment to Conservative Judaism and to the Jewish people in general? Are such congregations more cohesive? Does leadership work better? Can these congregations arrive more easily at difficult decisions using good processes?

## **Conservative Religious Communities**

We need to study the functioning of Conservative religious communities as a subject unto itself. Only by understanding those communities through constant feedback from the field, can we maintain the sharpness and the reality-base to make our training of leadership both theoretically rich and practically relevant.

In this realm numerous questions abound:

1. How do these communities understand their sense of mission and purpose?
2. How do they create and apply norms and expectations?
3. What policies and programs advance their vision?
4. How do they acquire and expend resources?
5. How do different factions, leaders, and personalities work together, or come into conflict?

While leadership will obviously assume an important place in the study of communities in this context, we believe that the independent and distinctive need for a focus on the study of communities merits attention of its own.

## **A Note on Research Methodologies**

The research on leadership will draw on both survey and qualitative techniques such as participant observation, key informant interviews, depth interviews, focus groups, and the analysis of documents and other materials. We may use new methods of research in the study of contemporary North American Jewry such as people writing about their experience of community, or asking leaders or members to keep detailed diaries. We must be open to a variety of research traditions and approaches as practiced in such academic disciplines as

sociology, anthropology, history, psychology, and economics, as well as in commercial or political research. In addition, we will develop different ways of generating research within the Institute itself. For example, we could develop a think tank comprised of researchers and practitioners who would be dedicated to sharing their experiences and knowledge of leadership. We could also offer research fellowships to graduate students and post-graduates with expertise and interest in leadership training and analysis.

## STRUCTURE

### The JTS Setting

JTS sponsors a number of programs to strengthen the skills and know-how of current leaders within the Conservative movement. These include:

- The Wagner Institute, a week-long program for potential synagogue leaders
- The Rabbinic Training Institute, an intensive week-long program for rabbis in the field
- The two-year Avi Chai-sponsored programs to retool experienced administrators as day school heads
- The Herold Institutes, days of study held in local communities
- The annual week-long National Association of Synagogue Executives (NASE) programs for congregational executive directors
- Occasional programs sponsored by the Melton Center for Research in Jewish Education that expose practitioners to new curricular and pedagogic thinking and research.

These and other efforts are scattered throughout JTS and are not coordinated in a central fashion.

The Institute would enable JTS to bring all of its current programs under a single coordinating body and add many new initiatives. Much could be gained from such an approach:

- Programs could benefit from shared staff members—both in-house and outside consultants.
- Programs would bear a distinctive stamp. A coordinated effort would also eliminate duplication of effort.
- Programs would tap the expertise at JTS, particularly within the faculty, who could serve both as teachers in programs and advisors on the texts employed in study sessions.

Moreover, these programs would bring together different types of leaders, thereby modeling at JTS the collaboration that is needed in the field. The synergy created by such programs would enrich all participants and would bring much greater *visibility* to efforts in leadership training under the auspices of JTS.

***Clientele***

There are two populations for the Institute which require on-going training to help them grow as Jewish leaders:

- Professionals currently in the field (rabbis, cantors and religious educators)
- Congregational lay leaders.

Rabbis, cantors, and religious educators have undergone professional training during their years of study. As they progress through their careers, they cannot rely solely on the know-how acquired during their formal professional training, as they often find themselves needing to develop new skills and understanding. The Institute will work with these populations to provide them with the skills they need by organizing homogeneous cohorts based on various criteria. For example:

- Pulpit rabbis with congregations of the same size
- Rabbis serving in smaller Jewish communities or in large urban settings
- Rabbis who have served as assistants and are poised to assume a solo pulpit
- Rabbis who are poised to assume a large pulpit
- Cantors who have completed a few years of pulpit work
- Religious educators who have developed administrative skills and are poised to assume a leadership position in a supplementary school or day school.

The second population—lay leaders—poses a different set of challenges. The Institute will develop a graded program to work with congregational leaders, members of Solomon Schechter day school boards, and members of the National Ramah Commission at various stages of their involvement. The Institute will identify up-and-coming synagogue members who show promise of future congregational leadership, and will also run programs for board members who show promise of assuming a higher office in their congregations.

Since one goal of the Institute is to foster collaborative leadership, the programs for these disparate groups will intersect whenever possible.

***Staff***

The Institute will require several staff members:

**A Director**

The director will: plan the curriculum for each clientele population; hire the educators, consultants, and mentors needed by each program; market the programs and recruit students;

and foster research. The director must be conversant with the field of leadership studies and connect with peers at other institutions. The director will also serve as an advocate within JTS, alerting the administration to new trends within the field of leadership studies and stimulating reflection on how to incorporate more leadership material into the thinking of the institution. The director will work with the JTS development department to obtain funding for program initiatives and will also work with researchers to obtain grant funding. To establish the Institute properly and develop sound programming from the start, the directorship should be a full-time position.

### **Mentors**

The Institute will hire part-time mentors who will develop on-going relationships with the clientele populations. Mentors will be encouraged to maintain contact with a set number of “clients” over a period of years. The mentors will require training.

### **Part-time instructional staff**

Instructional staff will represent a blend of academics, practitioners, and policy-oriented specialists, and will teach a mix of seminars and classes. For example, the Institute will need academics to teach textual content-based classes, and will need to draw upon the expertise of rabbinic practitioners and students of congregational life, such as experts at the Alban Institute. Consultants with skills and knowledge in organizational dynamics, family systems, professional transitions and institutional change will be engaged as required. Finally, we will expose leaders to broader policy questions by inviting experts from the leadership field and other centers of policy research.

### **Visiting Faculty**

The Institute will recruit visiting faculty for specific tasks. The presence of these visitors on campus holds the promise of cross-fertilization with current JTS faculty; some visitors may also teach in JTS degree programs, thereby enriching our course offerings. For example:

- A rabbi-in-residence may simultaneously work with our clientele in the Institute and with JTS students.
- Distinguished lay leaders may teach Institute programs and visit classes offered by our professional schools.
- Authorities on leadership training will meet with both populations.

### **Researchers**

As noted in the section entitled “Research: Rational and Program,” the Institute will sponsor on-going research. Part-time researchers will be commissioned to engage in “evaluation research” to measure the effectiveness of Institute programs, and to help the Institute—and the larger Jewish community—learn more about the conduct and functioning of Jewish leadership, the effectiveness of existing leaders, the larger Conservative communal setting, and other contextual matters.

### **Administrative Assistant**

An administrative assistant will be needed to handle the day-to-day office needs and help with program logistics.

### ***Governance***

The work of the Institute connects to several dimensions of academic life at JTS. First, ongoing research and program development in leadership training must involve JTS faculty—as well as colleagues from other academic institutions—who will lend their expertise to Institute programs to train rabbis, educators, and lay leaders. Second, the Institute will foster on-going research that must connect with academic life at JTS. And third, we anticipate that this research will enrich the thinking about curricular matters taking place within the five schools of JTS. Accordingly, the Institute must operate within the academic sphere of JTS.

To solidify this connection, the director of the Institute should report directly to the Provost of JTS. Together, they will insure the high quality of the Institute’s work and manage the interactions between the Institute and other sectors of JTS academic life. It will be important that the director and Provost bring the deans and relevant school committees into conversation with Institute staff to develop new curricular thinking based on the Institute’s work. They will also insure the active participation of faculty in training programs. The director and Provost will build a research structure into the Institute’s ongoing work. As noted above, this research will operate as follows:

1. Develop ongoing assessment of the Institute’s programs to determine what is working and what is not. This assessment process will insure an ongoing stock-taking on the part of the Institute.
2. Design research designed to inform the Institute’s thinking regarding the populations it serves. Such research would include needs assessments of various leadership populations at different stages of their careers; a comparative analysis

of differences between the needs of rabbis, cantors, and educators; and research on factors affecting the recruitment of congregational lay leadership. Both qualitative and quantitative research will be required.

To fully integrate the work of the Institute with other activities of JTS, it is vital that the top administration of JTS have a detailed understanding of the Institute's work. The director will write annual reports to the Chancellor and the Chancellor's Cabinet. At the discretion of the Chancellor, the director may be asked to report periodically to the Cabinet in person. Given the important implications of the Institute for JTS' institutional advancement, the Director will maintain regular contacts with a designee of the Vice Chancellor for Institutional Advancement, thereby insuring a high level of coordination.

In addition, the Director will work with an Advisory Board consisting of the Provost, the deans of the Rabbinical and Davidson Schools, and six to eight outside consultants from academia, the organizational world of American Jewry, and the Conservative movement. The Advisory Board will offer guidance to the Institute, and will serve as a sounding board for new ventures. Members will help to build relationships between the Institute and other organizations, and will also monitor the quality of programming and the success of the Institute's initiatives. Ultimate authority over the Institute, however, must lie within the control of the administration of JTS.

The work of the Institute will be coordinated with arms of the Conservative movement by the director and Provost. In-service training of rabbis will be conducted in partnership with the Rabbinical Assembly; in-service training of religious educators will take place in cooperation with professional organizations of those educators and cantors. Programs for lay leaders of congregations will be done through a cooperative alliance between the Institute and the United Synagogue of Conservative Judaism. The details of these working relationships will unfold gradually. However, it is clear that, at the start, the director must invest significant energy to build these relationships on the highest levels of Conservative organizations. Through its modeling of collaborative learning and its partnering with the United Synagogue, the Rabbinical Assembly, the National Ramah Commission, the Educator's and Cantors' Assemblies, and the Schechter movement, the Institute holds the potential to bring together groups that do not often collaborate. If properly done, such coordination may yield the secondary benefit of positive changes in the culture of the Conservative movement.

The Director should also work with an Educational Advisory Board comprised of academics and educators who have knowledge of the various clientele populations, and will

help think through curricular matters. Whereas the Advisory Board mentioned above will link various constituencies, the Educational Advisory Board will help to formulate educational goals and deliver the best possible program content.

## **Program Time-Line**

The Institute needs to grow in three stages as follows:

### **Stage 1**

The Institute will focus on programs for pulpit rabbis at three or four distinct stages in their careers. The goal for the first year, however, needs to be to segment the population of potential rabbinic clients and to tailor programs to their specific needs, depending on where they are in their careers. We strongly urge that pulpit rabbis not be compressed into one amorphous group or that initially only one workshop is run. We must launch the program with a good faith effort to address various populations of *emerging* rabbinic leaders. Optimally, the first year will involve at least three to four different rabbinic groups for programs of varying lengths, with some groups meeting for two- or three-day workshops, and other programs lasting a week or two.

### **Stage 2**

After a year or two of workshops for pulpit rabbis, we would expand to include emerging congregational leaders. As above, we advocate running concurrent sessions for leaders at different stages of their involvement. Opportunities should be built into the program for future congregational leaders to study with pulpit rabbis.

### **Stage 3**

We will introduce a set of workshops and programs for cantors and religious educators who operate in the synagogue setting. We are mindful that the needs of educators are varied. Those who work in congregational life share many common challenges, and need to study together with pulpit rabbis and congregational lay leaders.

When all three stages have been implemented, we should be running concurrent programs for all three populations. The mix of groups will vary each year. Some years we may have several groups of rabbis and only one group of cantors or educators; other years we may have more groups of the latter and fewer rabbis.

After we have gained sufficient experience with all three groups, the Institute may have gained sufficient know-how and experience to serve as a consultant to programs outside of the Conservative movement. Much like the Alban Institute, which offers consulting services to many populations, our Institute could enrich the thinking of a range of Jewish organizations. It will convene conferences, consult with congregations within the Conservative movement, and also offer speakers and programs outside of the Movement.

### **Working Budgets\***

The cost of the leadership institute may be broken down into two central categories: administrative and programmatic.

The annual administrative costs of the institute will be:

Director salary, benefits	145,000.00		
Secretary - salary and benefits	42,000.00		
Faculty	60,000.00		
Consultants	30,000.00		
Supplies, postage, and duplicating	15,000.00		
Publicity, advertising materials	20,000.00		
Travel	20,000.00		
			<b>\$332,000.00</b>

**\*Note:** We anticipate that some of these costs will be off-set by fees charged for the programs. The Task Force does not assume that the Institute will make all its programs available gratis. At the least, participants will be asked to cover their own transportation and room costs plus registration fees.

The following are sample budgets based on two programs included in this proposal to be run at an external facility.

**Gender and Leadership (2 days, 20 participants, 5 staff)**

Faculty- 5 @ \$325 p/d X 2 days	3250.00
Room (\$150 per night X 2 nights X 20)	6000.00
Board (\$52 p/d X 2 days X 25)	2600.00
Air Transportation (\$500 X 20)	10,000.00
Local Transportation (\$60 X 25)	1500.00
<b>TOTAL:</b>	<b>\$23,350.00</b>

**Board Leadership Workshop (25 participants, 5 staff, 8 days)**

Faculty- 5 @ \$325 p/d X 10 days (including 2 consulting days off site)	16,250.00
Room (\$150 per night X 8 nights X 30)	36,000.00
Board (\$52 p/d X 8 days X 30)	12,480.00
Air Transportation (\$500 X 20 X 2 trips)	20,000.00
Local Transportation (\$60 X 25 X 2)	3,000.00
<b>TOTAL:</b>	<b>\$87,730.00</b>

The programmatic costs for three programs per year of five days duration located at JTS are:

Travel (\$500 pp for plane fare + \$50 Local) X 15	8250.00
Room (15 people X \$135 per night)	10,125.00
Board	3,500.00
1 Program Total:	\$21,875.00
<b>3 Program Total:</b>	<b>\$65,625.00</b>