Informed and Passionate Dialogue: Transformative Community Change Initiatives

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…and teach the people of Israel so that they may discuss, inquire and learn, becoming suf-ficiently knowledgeable to teach, in their own words, to others—ensuring that the chain of Jewish education will always continue (Deuteronomy 31:19).

The ultimate goal of Jewish education is to engage youth, families and adults in a pursuit of lifelong Jewish learning and affiliation with the community (Aron et al. 1995; Cohen 2006). In the Western world, the engagement of Jewish individuals in lifelong learning is a daunting task. Jewish individuals are able to participate freely in their country's educational, economic and social institutions with or without acknowledging either their individual Jewish identities or connections to a broader Jewish community (Sarna 2004; Padva 1991). The challenge is to create Jewish learning experiences that provide individuals and families with the breadth and depth of learning to enable them to live as Jews (Wertheimer 2007).

The dissemination of *A Time to Act* (Commission on Jewish Education of North America 1991), along with the 1990 National Jewish Population Study, influenced many federations to create "Commissions on Jewish Continuity". Most of these continuity commissions decided that their communities needed to provide quality formal and informal educational options. It was perceived that the net result of these educational experiences would be an increase in the number of individuals and families engaging in lifelong Jewish education. As a result, educational change projects in formal and informal Jewish education were funded.

The new educational options were not just an improvement in the status quo but were designed to create transitional change. A transitional change is a carefully designed "new way of doing" something that is different from what currently exists. The new educational options were carefully planned and implemented to be of high quality and to be aligned with the learning needs of individuals and families. They were not just a fine-tuning of existing options. They included both formal and informal educational options that often resulted in a temporary increase of involvement by those who participated in them. In most cases, the organization that was providing these new educational options did not perceive that they needed to change as part of the process.

Educational practitioners, researchers, professional leadership and lay leadership continue to perceive that transitional changes that result in incremental change in curriculum design are not resulting in a sustainable and significant increase in the number of Jews who choose to live a meaningful Jewish life. To achieve this result, it is essential to transform the quality of Jewish education and the entire educational system (Flexner 2000; Sarna 2004). Transformational change is "the fundamental shift from one state of being to another…a change so significant that it requires the organization to shift its culture and people's behavior and mindset to implement it successfully" (Ackerman & Anderson 2001, p. 4). If Jewish education is to deliver quality learning options that "link the silos" (Wertheimer 2005) between formal and informal education, there is a need for a compelling commu-

nity-wide vision for Jewish education and a commitment to provide the resources needed to achieve it (Fox et al. 2003).

A community-wide Jewish educational vision that evokes excitement and commitment must be based on a consensus that is fashioned not just by the community's *machers* (leaders) but also by the diverse stakeholders that would be impacted by it (Bunker & Alban 2006; Susskind et al. 1999). In the last decade the leaders of many Jewish educational change initiatives have understood the need to provide meaningful opportunities for community participation to shape new educational directives. In *A Report of the Miami Commission on Jewish Continuity* (1994) the decision to create an effective instrument of change led the Commission to recognize

> the need to be inclusive of a wide range of viewpoints since solutions to the challenges of Jewish continuity are the responsibility of all parts of the Jewish community. As it was from its inception, the Commission has not been the voice of the Federation, the synagogues or any single element of the community, but a Commission of the entire Jewish community. While the Federation has provided financial and staff resources, others brought different perspectives, issues and resources to the community process.

Transformative change can only occur if the stakeholders who are impacted by and those who can implement the change jointly work together to create a compelling vision and execute it. Transformative change is systemic and affects the larger learning environment. *Recent Trends in Supplementary Jewish Education*, (Wertheimer 2007, p. 11) describes why improvement in synagogue education needs to be systemic change:

> Still another strategic question is whether the key effort for improvement should be directed toward the classroom or toward the larger learning environment. Systemic or holistic initiatives assume that such changes will have a limited impact, absent a sustained effort at organizational restructuring that gives power to a wide spectrum of so-called "stake-holders" and which opens the process of decision-making to transparency, mission-directed planning, and democratization. More broadly, the systemic approach looks beyond single programs to the mix of educational opportunities available to children and their families, and tries to create a synagogue-wide transformation, connecting the school to early childhood, teen experiences, adult education and family education. It seeks linkages, rather than strengthening the school in isolation from other educational venues.

This chapter will present an overview of transformative community change models and processes, how to create and implement transformative initiatives, the impact of transformative community change initiatives on the achievement of outcomes for Jewish education and implications of transformative change approaches for education, change and research. It reflects my perspectives as a seasoned scholar-practitioner with decades of international experience in all aspects of organizational and community change in Jewish and non–Jewish educational systems.

CHARACTERISTICS OF TRANSFORMATIONAL COMMUNITY INITIATIVES

> One cannot solve a problem from the same consciousness that created it.
>
> Albert Einstein

Systemic community change initiatives for Jewish education that compel stakeholders to create, implement and sustain a fundamental shift in the vision, mindsets, culture and protocols of the sponsoring organization (e.g., synagogue, school, JCC) and of the formal and informal educational options are transformational change efforts. They require a different way of thinking and engagement than other forms of educational change initiatives that fall under two other distinct headings: developmental and transitional (Ackerman & Anderson 2001; Cummings & Worley 2005). Most of the current examples of successful Jewish educational change projects have resulted in either devel-

opmental or transitional change. If the desire is to create transformative change, it is important to know the differences between three types of change approaches.

The focus of developmental change is an improvement in a specified area such as an existing curriculum. It is a fine-tuning of the status quo. The focus of a transitional change is a redesign of an organizational system, process, structure or work practices such as the redesign of the content and teaching style for an educational program. These types of projects are implemented by creating a strategic plan or a project plan that has specified tasks and timelines that ensure the achievement of incremental changes. Developmental and transitional change projects result in valuable improvements in specific aspects of Jewish education.

However, these types of educational changes, of and by themselves, do not result in sustainable changes to the community's total educational system. Only a transformational process will enable the system as a whole and its formal and informal educational components to create sustainable and deep-seated improvement in the quality of their educational options (Fullan 2005). An example of an educational transitional change project would be a program that provided excellent short-term professional development for existing educators but did not create a culture of excellence and the resources needed to sustain ongoing quality professional growth. Transformative change initiatives can be designed to systemically change education within an organization (e.g., a day school) or at community levels (e.g., a network of institutions or all of the day schools in a community or all of the stakeholders in the community).

The focus of transformational change in Jewish education is the creation of a powerful vision and the deep-seated reshaping of the mindset, values and behavior of professional and lay leaders about how Jewish education functions and how it relates to Jewish affiliation and lifelong learning. In other words, the entire nature of Jewish education is fundamentally changed. An example of this reshaping would be that the leaders understand that early childhood programs are not "babysitting" but are part of the educational continuum from early childhood through the teen years. It would also include an understanding that there is a need to reshape both early childhood educational programs and their interface with other formal and informal educational programs. This shift would include the acknowledgment that the culture of employment and *kavod f*or early childhood educators should be the same as for day school educators, including the provision for quality professional development, salaries and benefits.

Transformation only occurs if a new reality for the substantive issues and stakeholder engagement is created. Due to the uncertainty and chaos that must occur to create a new reality, it is possible to know the desired outcomes but not exactly how to achieve them. Transformations create strong responses in those who are undergoing them. Since transformational change creates deep-seated shifts in the system's substantive matters and community change, it cannot be implemented by following a strategic implementation plan that identifies the exact sequence of action steps. Rather, transformative change processes must respond to emerging challenges and opportunities with carefully thought-out course corrections for both the action goals and implementation steps (Ackerman & Anderson 2001). Transformative change often seems to be chaotic and unpredictable. Through a conscious use of transformation principles such as building the transformative change strategy, roles for leading and implementing the strategy, course correction protocols and communication processes (Ackerman & Anderson 2001; Wheatley 1999), the chaos will be effectively addressed.

In order for a change in Jewish education to be transformative, the key stakeholders who share a common interest in the quality of Jewish education and the Jewish communal system will create a new vision based upon their jointly changing their mindsets, values and behaviors. In effect, these key stakeholders become partners in creating and implementing the change process. Depending on the nature or type of entity that is being changed, the key partners must represent the broad range of interests involved in the organization or community. Change processes are designed to enable existing and emerging parties to engage in "interactive think tank" opportunities to help shape a new vision, desired outcomes and implementation steps, all grounded within a system of Jewish values and wisdom.

CREATING AND IMPLEMENTING TRANSFORMATIVE COMMUNITY CHANGE INITIATIVES

Transformational change initiatives, whether in Jewish education or other areas of Jewish communal activity, must address three factors: 1) substantive areas to be changed (e.g., curriculum, organizational design, staffing patterns); 2) people (mindset, behaviors and cultural changes required to achieve the desired substantive changes); and 3) process (actions used to plan, design, implement and evaluate the substantive and people changes). These factors interweave with each other to create a set of concepts and approaches that mobilize organizations and the community and fit into the following categories: a Transformative Change Formula, a Change Process Model and Mobilizing Community Partners.

TRANSFORMATIVE CHANGE FORMULA

A transformative change formula illustrates what must be considered to effect real change in individuals, organizations and communities. The following DVF change formula is a version of the work of Richard Beckhard (Beckhard & Harris 1987). It was modified by Kathleen Dannemiller (Whole-Scale Change 2000) when she developed her Whole Scale Change. This transformative change approach is widely used to align the actions among hundreds of people to create powerful and successful processes for change (Holman et al. 2007).

The premises underlying the components of the DVF change formula are based on proven organizational change theories and approaches that are used in transformative change initiatives (Cummings & Worley 2005). The change formula is composed of the following four elements that describe the conditions necessary for a paradigm shift that supports the creation of a new reality.

$$D \times V \times F > R$$

(Dissatisfaction x Vision x First Steps > Resistance)

The first step in creating sustainable change is for individuals and the organization(s) to create dissatisfaction (**D**) with the current reality. The case for change can show that the current reality does not support the achievement of desired substantive change (i.e., educational change) or increase change competencies (capacity of community to implement the change initiative). The dissatisfaction with the current reality could be that youth do not continue with Jewish education after becoming bar/bat mitzvah.

The change partners use consensus decision-making tools to create a shared Case for Change database. It is essential that the data be gathered in a manner that allows in-depth dialogue to occur. The dialogue enables those who are creating the Case for Change to understand and appreciate each other's needs, interests and perspectives. It enables them to create a shared database that everyone accepts as the current reality and the reason why a transformative change is needed. These data can be gathered by means such as surveys, focus groups or trend analyses.

The second step in creating sustainable change is the creation of a consensus-based vision (**V**) that expresses a common yearning for the desired future state. The initial vision is often created by those who are sponsoring the change initiative. The sponsors are dissatisfied with the current reality and perceive that there is a need for a transformative change. In order to implement a transformative change, those who initially perceive the need for change need to reach out and engage other stakeholders in a joint exploration of the current reality and the creation of a future vision. As the change process unfolds, the vision needs to be jointly refined by those who initiated the change and those who are joining the effort.

After the dissatisfaction is identified and the initial vision is created, the change partners create the first (**F**) action steps to help the organization or community begin to actualize the vision. The outcomes from an effective transitional change project may be used as a foundation for some of the transformational initiative's s first steps. If any of the three forces (D or V or F) are not present, or if the combined presence of all three is low, the proposed change will not be able to overcome the resistance (**R**) that naturally arises during change efforts.

Resistance to change is normal and can occur at organizational, group, and individual levels. Resistance is an individual or sub-group's feeling that the proposed change is not what should be happening for them or for their organization. In transformational change, the change leaders use consensus-building approaches to understand what is causing the resistance and what purpose it is serving. When consensus-based thinking and decision-making tools are used, the commonalities between the individuals, organizations and members of the community are usually expanded without any part having to deny its core values and needs. The use of consensus approaches often results in changing the resistance into a shared commitment to the joint initiative. The change in perceptions that results in the parties working together to achieve the transformation is a paradigm shift, which is a new way of seeing the world that enables the change participants to "take the actions that that will begin to transform their shared vision into their shared reality" (Dannemiller Tyson Associates 2000).

To create the consensus conditions described in the Change Formula (D x V x F > R), a Change Process model is used to design the responses to the elements of the change formula.

CHANGE PROCESS MODELS

A change process model contains sequential phases that guide the creation, implementation and evaluation of a transformative community change initiative. Each of the phases has action steps that address the community change with substantive tasks. There are many change models being used to change Jewish education (Shevitz 1995; Woocher 1995; Ackerman & Anderson 2001; Fullan 2005).

A change process model provides change activists with the opportunity to understand why they want a change and to experience a deep-seated change in their mindset, values and behaviors. All transformative change process models include ways to address factors such as how to support inclusive engagement, enhance commitment, create consensus-based relationships and create supportive changes in mindset, values, behavior. The substantive tasks include ways to address factors such as how to create innovative and pragmatic systemic changes in structures, systems, processes or technology (Ackerman & Anderson 2001). These change models are implemented using consensus-based system thinking tools and deep dialogue approaches that include informed and passionate dialogue with advocating for one's views and a genuine inquiry into the views of others.

Transformational change process models (Ackerman & Anderson 2001; Fullan, M. 2001) have phases that are presented in a sequential manner that are similar to those found in traditional strategic planning. Change process strategies need to be carefully customized so they are aligned with the community's characteristics, the needs of the parties and the nature of the substantive issues and the desired outcomes. Transformative change process models can also be used with transitional change projects that involve several issues and impact several parties, especially those that are likely to support future transformative changes.

SIX-STAGE CHANGE PROCESS MODEL

One example of a transformative change process model that has been used to transform Jewish education is the Six-Stage Change Process Model. Project *Kavod*: Improving the Culture of Employment for Jewish Educators (Schaap et al. 2007) was created and implemented using this model. It is similar to other change process models (Dannemiller Tyson Associates 2000; Kotter 1996; Lippitt 1958; Nevis et al. 1996; Ackerman & Anderson 2001) that are used to create institutional and community systemic changes.

The Six-Stage Change Model and specific tools to implement it are in a manual that is on the website of The Coalition for the Advancement of Jewish Education (www.CAJE.org). Although the model's first stage must be the initial phase, the remaining stages are not always implemented in a linear fashion. In order to respond to emerging challenges and opportunities, the implementation of the stages is done in a fluid manner with a lot of back-and-forth movement between the stages. Earlier stages are re-addressed as the change partners grow in their understanding of the substantive issues related to the achievement of the initiative's desired outcomes. The six stages and the main actions that are included in each stage follow.

STAGE ONE: DECIDE TO ACT

During the first stage the initiative's formal leaders create the foundation that is necessary to successfully launch the change processes. The major tasks at this stage are:

- Identify the Case for Change by studying key internal and external indicators regarding the current reality of a given substantive condition (e.g., Jewish education).
- Create a team of change leaders (lay, staff and consultants). The change leaders need to understand that by launching a transformative change they will be creating a new reality for both the substantive issue and how it is delivered (e.g., creating a new culture of employment for early childhood Jewish educators). The team needs to include one or more members who are experts in transformative organizational and community change.
- Create an initial vision, guiding principles and desired initial outcomes for substantive issues and stakeholder engagement.
- Garner the resources needed for the initiative's change processes.

STAGE TWO: CREATE PARTNERSHIPS

In stage two the initiative's formal leaders share the case for change and the initial desired outcomes. Depending on the change initiative, the formal leaders could be a planning committee or a larger group of stakeholders. The major tasks to be accomplished are:

- Identify and activate an inclusive network of dedicated partners. Key stakeholders, organizational and individual, are contacted and asked to join in the initiative's consensus-decision making change mechanisms (e.g., task forces, project sites and study circles).
- Develop a common knowledge base and refined Case for Change that provide compelling data for motivating the change. Assessment processes are created to update the Case for Change or gather data in a more systemic manner (i.e., administering a Culture of Employment Survey to the community early childhood Jewish educators).
- Refine the vision through consensus-based system thinking and deep dialogue among the key stakeholders.
- Create a customized change process model.
- Acknowledge the needs of all partners.

STAGE THREE: DESIGN THE INITIAL DESIRED STATE

In the third stage the initiative's desired outcomes and vision are used to identify the actual future state that will be created. The design work is done using consensus-based decision-making approaches. The active engagement of the initiative's participants increases support for the desired outcomes. The major tasks are:

- Create an expanded shared purpose, values, final vision, and commitment to the achievement of the initiative's desired outcomes.
- Assess the current reality of the substantive issues and the success of the community change efforts.
- Create action recommendations and incorporate them into an adaptive strategic plan that is fluid enough to respond to key emerging challenges and opportunities.

STAGE FOUR: MOBILIZE THE ORGANIZATIONS AND/OR THE COMMUNITY

In the fourth stage the desired outcomes, case for change, vision and action recommendations are shared with the larger community in order to mobilize boarder support for the desired outcomes. The major tasks to be accomplished are:

- Identify and engage key community stakeholders (at organizational and/or community levels) so that they understand the need to achieve the desired outcomes.
- Identify potential funders (federation, foundations, grants and organizational).

- Garner feedback from the initiative's core participants and other impacted parties on how to enrich the proposed action recommendations and the partnership network.

STAGE FIVE: IMPLEMENT THE CHANGE

In the fifth stage the implementation plan is activated and carefully monitored. Modifications in the plan and its implementation are made to ensure that the desired outcomes are achieved and that the project continues to receive support from the community and/or stakeholders. Since transformation creates a qualitative difference in the outcomes projected and expected, the response of the community must be carefully addressed. The major tasks are:

- Create short-term gains by implementing the recommendations at a pilot site or by focusing on a few action goals.
- Assess the impact of the implementation and refine as needed.
- Use the success of the initial action steps to create more substantive changes and increase the participants' change competencies.

STAGE SIX: LEARN, MODIFY AND SUSTAIN THE CHANGE

In the sixth stage, continue to learn and reflect on the impacts of the change process in order to create course modifications. This will sustain the initiative's efforts to fully achieve the substantive changes and increase the change competencies. The major tasks include:

- Establish a system to continuously improve and sustain the initiative.
- Identify the cumulative impact of the change, including direct and indirect impacts, in order to continuously improve implementation process.
- Acknowledge and celebrate the short-term and long-term outcomes.

In summary, the use of a robust change model enables the partners to achieve their desired outcomes by connecting multiple current realties into a common case for change, creating a compelling vision and desired outcomes, and designing a mutually acceptable implementation plan.

MOBILIZING AND ORGANIZING COMMUNITY PARTNERS

Transformational change requires that the parties who have a direct impact on the achievement of the desired outcomes be mobilized during the creation and implementation of the vision, desired outcomes and implementation process. Community change initiatives have a continuum of participation levels that range from informing and educating to listening to the community to engaging in joint decision-making to creating consensus agreements (Creighton 2005). Each includes a set of core values that govern the creation and implementation of the engagement approaches. Although there is an inclusive engagement of stakeholders, the sponsoring entities of educational change (e.g., a school system, a synagogue, a federation or central agencies for Jewish education) retain the ultimate decision-making authority (Creighton 2005).

The core values and principles used for the mobilization of stakeholders in Jewish educational change are similar to those used in public sector education and community change. The International Association for Public Participation (IAPP 2000) was created to protect the integrity of public participation processes. With extensive international input, IAPP established the following core values that are aligned with the engagement needs of transformative change:

1. The pubic should have a say in decisions about actions that could affect their lives.
2. Public participation includes the promise that the public's contribution will influence the decision.
3. Public participation promotes sustainable decisions by recognizing and communicating the needs and interests of all participants, including decision-makers.
4. Public participation seeks out and facilitates the involvement of those potentially affected by or interested in a decision.
5. Public participation seeks input from participants in designing how they participate.

6. Public participation provides participants with the information they need to participate in a meaningful way.
7. Public participation communicates to participants how their input affected the decision.

TRANSFORMATIVE JEWISH EDUCATION CHANGE INITIATIVES

If you will it, it is no dream. Theodor Herzl

Transformational change initiatives for Jewish education are increasing in their number and their impact on formal and informal Jewish education. Several notable transformative initiatives are the Experiment in Congregational Education; Project Kavod: Improving the Culture of Employment in Jewish Early Childhood Education; La'atid: Synagogues for the Future; and Synagogue Transformation and Renewal (Issacs 2005).

An overview of two of the transformative change initiatives, La'atid and Project Kavod, will permit a more in-depth examination of the impacts of a transformative change initiative on the achievement of substantive changes and an increase in change competencies (capacity of community to change education). The description of the two cases is presented using excerpts (in italics) drawn from the executive summaries of the final reports. The descriptions of the two cases illustrate how each project used transformative change best practices to create a customized change approach that resulted in substantive Jewish education changes and enhanced the change competencies of those who participated in the initiative. The next section will present the implications and policy directions that have been drawn from these two cases and the research literature on community educational change initiatives.

LA'ATID: SYNAGOGUES FOR THE FUTURE'S EXECUTIVE SUMMARY

La'atid: Synagogues for the Future (Issacs, 2005) is the community-based initiative that was launched in 2000 by the Commission on Jewish Education of the Jewish Federation of Greater Hartford to help the community's congregations nurture a strong sense of Jewish identity, increase Jewish knowledge and enrich Jewish living in their constituents of all ages. La'atid was funded by the Jewish Federation of Greater Hartford, the Jewish Community Foundation of Greater Hartford, and the Commission on Jewish Education of the Jewish Federation of Greater Hartford. As with all effective change process models, the La-atid change processes provided the lay and professional leaders at each of the synagogues with opportunities to understand why they wanted a transformative change and to enable them to experience a deep-seated change in their mindset, values and behaviors. A report on La'atid is on the JESNA website.

Over an initial three-year period (2000–2003) the first cohort of three synagogues engaged in individual organizational change processes that reflected and responded to each congregation's vision, culture and needs and that helped each congregation advance toward its own goals. While each congregation was expected and encouraged to develop its own unique vision and goals, they all shared the project's common set of over-arching aims and definition of success. These included:

- involvement of a broad base of professional and lay stakeholders in congregational planning and decision-making;
- the organic interconnection of synagogue and school, with the school seen as central to the congregation's purpose, mission, goals and activities;
- strengthening and expanding partnerships among professionals and lay leaders;
- rethinking and visioning creative change opportunities in the school and synagogue;
- implementation of experimental action plans to bring congregations closer to their idealized visions of themselves;
- varied expressions of more positive Jewish identity by constituents of all ages;
- increased Jewish knowledge among constituents of all ages;
- strengthening professional and lay leadership; and

- institutionalization of the changes and participatory processes into the fiber of the congregations within three to five years.

The Commission on Jewish Education received additional funding in 2003 for a second phase of La'atid (Phase II) to:

- continue work with the first cohort of congregations (La'atid I) in order to maintain and extend the original congregational work in addition to integrating and deepening the effort by implementing a new emphasis on congregational schools and developing professional learning communities; and

- add two new congregations (La'atid II) using best practices learned from La'atid I and other national initiatives.

La'atid provides each congregation (from both cohorts) with ongoing support and guidance for congregational strategic visioning, planning and implementation by a highly experienced local facilitator and the project's educational director. Lay and professional leaders from each of the congregations enroll in relevant credit-bearing courses (e.g., Synagogue/School Renewal and Leadership) at the Hartford Institute of Jewish Studies: An Affiliate of Hebrew College. The La'atid Challenge Grants provide funding to support programmatic initiatives emanating from the strategic planning processes in each of the congregations. Annual conferences (e.g., "Reaching Out: Finding and Involving Young Families" in Spring 2005) exposed La'atid (as well as other community educational institutions) to knowledge and experience from field leaders and national models from outside the community.

PROJECT KAVOD'S EXECUTIVE SUMMARY

In 2004, the Coalition for the Advancement of Jewish Education (CAJE), with funding from the Covenant Foundation, launched a three-year pilot project to improve the culture of employment in Early Childhood Jewish Education in Miami-Dade, Florida (Schaap et al. 2007). The idea for this project was initiated by CAJE's Advocacy Commission.

Project Kavod: Improving the Culture of Employment in Early Childhood Jewish Education (ECJE) was implemented by CAJE in partnership with The Center for the Advancement of Jewish Education of Miami-Dade (CAJE-Miami), The Greater Miami Jewish Federation and the four project pilot sites of Bet Shira Congregation's Early Childhood Center, the Dave and Mary Alper Jewish Community Center's Early Childhood Center, the Hebrew Academy of Greater Miami's Early Childhood Center and Temple Beth Sholom's Early Childhood Center. The project was implemented using the Six-Stage Change Process Model. A report on the project and a change manual on its change processes are available on the Coalition for the Advancement of Jewish Education website (www.caje.org).

In addition to the partnership between CAJE the central agency, and the four synagogue pilot sites, a community task force was created whose members were also drawn from the partners and the general community. At the conclusion of the project a Project Kavod Community Leadership Forum was held. The forum was the largest event ever held for early childhood Jewish education and resulted in more stakeholders joining in the continuation of the project after it formally ended.

PROJECT KAVOD'S SUBSTANTIVE OUTCOMES

- Each of the four Project Kavod pilot sites significantly increased the salaries of their ECJE educators.

- Each of the four Project Kavod pilot sites raised the quality of their ECJE programs and the culture of ECJE employment through professional development and an assessment of their current program.

- Project Kavod's Community Task Force created a comprehensive set of eighteen action recommendations that addressed both the quality of ECJE and the culture of employment.

- The project partners and the Miami-Dade Jewish community increased their appreciation for quality ECJE and the need to improve the culture of employment.

- Project Kavod's Community Committee and Task Force now understand that there is a recruitment and retention crisis in Jewish education.
- Project Kavod's Community Committee and Task Force now understand that there must be an increased focus on the Jewish part of ECJE.
- Project Kavod's Community Committee and Task Force now understand the importance of ECJE to the future of the Jewish people.
- Project Kavod lay and staff leaders are collecting data on whether or not there is an increase in the number of children continuing to participate in Jewish education, whether at day schools, synagogues or JCCs.

PROJECT KAVOD COMMUNITY PARTNERSHIP OUTCOMES

- The community partners are now a committed and passionate network of informed lay leaders and professional staff.
- The sponsoring organizations and the change consultant engaged in ongoing contracting regarding their roles, responsibilities, and tasks and have created a deeper capacity to engage in national, communal and local site partnerships.
- Project Kavod created a data-based case for change using action research tools such as customized surveys, reviewing key documents, and identifying best standards that can be used as baseline data to continue the improvement of the culture of employment for ECJE educators.
- The project's partners, with the assistance of the project's change consultant, used state-of-the art consensus decision-making, dialogue, and systems thinking. They were taught how to select and use basic change tools for their future meetings.
- Project Kavod meetings supported the sharing of power and capacity to create mutually-acceptable recommendations and to continue to work in shared leadership settings.
- The partners learned that building partnerships and creating transformative change takes time. It is a process, not an event. The project's community partners and project staff took the time needed to create the case for change and create informed recommendations.
- The work of the project's partners was enhanced by the consultative team, who provided synergistic change consulting and evaluation support. The project's partners learned when they needed to have the assistance of technical and change process consultants and when they did not.
- At the beginning of each meeting the partners began by reflecting on text-based sources regarding the culture of employment in Jewish education, and a study guide, Text and Tradition: The Importance of Jewish Education and Jewish Educators, was created (Miskin 2006).

PERSPECTIVES ON TRANSFORMATIVE CHANGE APPROACHES

The two cases, La'atid and Project Kavod, illustrate the key actions that ensure the creation of a sustainable transformative initiative. Both cases enabled a community to achieve substantive Jewish educational outcomes and increased the individual, organizational and communal capacity to engage in complex consensus-based change. They were designed to promote synergistic interactions between a large number of key parties ranging from organizations to interest groups and individuals. The participants engaged in a variety of learning processes to ensure that they understood the substantive educational issues, consensus-based change approaches and the Jewish values related to Jewish education. The participants jointly created a vision, strategic and implementation plans and change process that were based on the community and organizational needs, values, interests and resources.

The foundations that funded these initiatives did so because they have a passionate commitment to achieve substantive educational goals. As a result, the foundation staff was engaged throughout the process and often helped respond to the challenges that arose when addressing the substantive issues and the change dynamics.

In both cases, several key messages and lessons learned emerged. The following overview may be used to design, refine and evaluate similar transformations. The factors directly related to the initiative's evaluation are presented in the following section on the evaluation of transformative change initiatives.

KEY MESSAGES AND LESSONS LEARNED

- *Complex Transformative Change Is a Long-term Process.* Both of the cases created significant accomplishments, but it will take several years and the allocation of significant resources to achieve long-term outcomes that are both systemic and sustainable.

- *Create Sustainable Partnership Funding.* Fiscal and leadership resources are required to achieve long-term changes. The resources for these systemic educational changes usually need to be garnered from multiple sources such as local sites, central agencies, federations and foundations.

- *Create Ongoing Learning Communities.* Both of the cases created learning communities where the participants expanded their understanding of the substantive issues in Jewish education, capacity to engage in informed and consensus-based change leadership, and awareness of Jewish values for education and community change. These learning communities occurred in different types of settings where lay and professional leaders learned together or where lay leaders and professional staff learned separately. The learning communities helped the participants create sound decisions that were data-based and pragmatic. The learning community processes also enable participants to accept and move beyond the normal frustrations that arise during participatory endeavors.

- *Create Change Strategies That Address Site-based and Community Change.* When the goal is to create systemic changes within a site and for the total community, it is essential that change processes are created at the site and community levels. Representatives of the sites and of the general community need to belong to the community-level committees or task forces in order to create a community consensus that "systemic Jewish education is needed and resources should be allocated to implement the changes". During the consensus-based meetings, it is important that traditional lay and professional "power brokers" view the other participants as peers. In order for this to occur, careful planning must be done to determine whether a decision is a recommendation to be considered or a decision to be implemented.

EVALUATING TRANSFORMATIVE CHANGE INITIATIVES

Evaluation of transformative change initiatives involves the ongoing collection and diagnosis of data that can be used to guide the creation of both quality systemic Jewish educational changes and participatory change strategy. This form of action research is based on an outcomes model that makes explicit the connection between initiative goals, inputs, activities, outputs and outcomes for the substantive issues and the change processes. Since transformations do not have detailed linear strategies, it is important that the evaluation approaches are not only based on traditional project evaluation tools but also use those that can accurately evaluate the emerging "realities" of systemic changes. Outcome evaluation for community transformation includes measuring changes in participants' knowledge, skills, behaviors, and values at individual, organizational and community levels.

In addition to evaluating the outcomes of the change initiative, research is also done during complex change initiatives. During Project Kavod the research efforts included a comprehensive survey of the ECJE educators regarding their perception of the culture of employment in their school, a fiscal analysis of the income, direct and indirect expenses and profit/loss for an ECJE site and a survey of ECJE directors. The results of the evaluations were used at the beginning to create the Case for Change and during the initiative to design action plans to enhance the culture of employment for ECJE educators and to identify what aspects of the ECJE programs needed to be addressed in order to improve the quality of the ECJE program.

CUSTOMIZED ACTION RESEARCH FOR EVALUATING TRANSFORMATIVE CHANGE

The research and evaluation approaches for Project Kavod and La'atid used a customized action research model that enabled the project evaluator and the change consultants to both garner key research and evaluation data and support the development of action goals by the change participants. Key features of a customized action research approach include the following:

- The sponsors, the change consultants and the evaluator/researcher jointly identify the research and evaluation questions of interest.
- The sponsors, the change consultants and the evaluator/researcher jointly develop the evaluation plan by using a customized logic model linking outcome goals, resources, activities, outputs, outcomes and the overall initiative impact on substantive issues and change leadership.
- The sponsors, the change consultants and the evaluator/researcher jointly develop a research plan to garner the data needed to determine the current state (case for change data) and to develop adaptive strategic goals and action steps.
- The sponsors, the change consultants and the evaluator/researcher develop appropriate methods to communicate the research findings to stakeholders (participants, funders, organizational sponsors).
- Participants use the research and evaluation information throughout the initiative because they believe the data is useful and credible and helps them to design ways to achieve their desired outcomes.

Goodman was the evaluator and researcher for Project Kavod. In the evaluation report on the project that she submitted to the funder (Covenant Foundation), she described her experience with Project Kavod. The following are excerpts of her report:

> The initial expectation of this evaluator was that she would serve as a "traditional" evaluator maintaining contact with the project throughout, perhaps a bit more intensely at first as goals were formalized, but doing most of the "assessment work" at the end. Since the initial diagnosis of this project clearly revealed that this was a complex multi-party and multi-issue project whose mandate was to do something that had not yet been done for early childhood Jewish education (ECJE), that model quickly became insufficient for the task at hand and an approach more akin to action research was utilized. Action research is "the study of a social situation, with a view to improving the quality of action within it" (Winter, p. 10). Action research involves the researcher working closely with project participants, sharing her expertise, acting when research or evaluation organically contributes to the project's goals. In the case of Project Kavod, that meant assisting in the change process to motivate lay leaders, professionals, parents, and funders to take action toward improving the culture of employment for early childhood Jewish educators. The evaluator served in fulfilling a goal of participatory research, namely, making "the evaluation process and its results relevant and useful to stakeholders for future actions" (W.K. Kellogg, p. 11). Her work was aimed at helping create a process and materials that could aid another community in undertaking a similar approach.
>
> In essence, the evaluator was a member of the consultative team who contributed to the project at all levels and throughout the process. This means that the "evaluative" component was not solely her work, nor solely her perceptions. As in participatory evaluation, "the evaluator's perspective is given no more priority than other stakeholders, including program participants" (W.K. Kellogg, p. 11). What the evaluator has to offer is technical expertise in how best to conduct evaluation drawing out the voices of the participants and engaging them in determining what is important to know and how to interpret data once it is offered. For example, the evaluator in writing up the report of the results from the early childhood Jewish educator survey did NOT offer recommendations. Not only did she work with the other staff members in synthesizing the findings into key messages and raising

questions related to the findings, she left the work of determining implications and recommendations to those who knew the community the best, those who were empowered to set policy and take action, the participants themselves.

This approach to evaluation helped overcome a problem associated with evaluation, namely that it is an intervention that can potentially negatively impact or impede a project. Since the evaluator was incorporated as a member of the consultative team, decisions on when to have her take stock of what was happening or be involved in any way, was sensitive to the main goal of engaging the stakeholders in improving the culture of employment and work conditions for early childhood Jewish education. Her involvement augmented rather than detracted from the process at all times (Goodman, 2007).

FUTURE DIRECTIONS

From the current evaluation reports, community partners and funders who use transformative change approaches are able to increase their capacity to implement systemic responses to Jewish educational challenges and to deliver demonstrable results and accountability. In order to address the fundamental issues that determine the long-term impacts of these changes, questions such as the following need to be addressed:

- How do you define a successful transformative community change initiative for Jewish education that includes multiple partners such as a partnership between local sites, communal organizations, national organizations and funders? What are the indicators of substantive and change competencies for each of the multiple partners?
- What will increase the willingness and the capacity of national and communal foundations, federations and central agencies to provide the fiscal resources needed to implement transformative community change initiatives for Jewish education?
- How can we improve our collective learning from the evaluation of transformative community change initiatives for Jewish education and translate that learning into action?
- What will help educational providers, funders and oversight agencies overcome the fractured manner in which the funding and delivery of education occurs when a "cloak of collaboration" is donned without fundamentally changing the ways that providers and funders do their work (Conner, & Kadel-Taras 2003)?

CONCLUSION AND HIGHLIGHTS

Compelling and systemic visions for Jewish education are more likely to be implemented if they are created by transformative community change strategies. This chapter described how to create transformational community change approaches that result in systemic changes in Jewish education for both the substantive educational issues and change leadership capacities. This chapter has shown that:

- In order for Jewish educational systems to deliver quality learning options and to create synergistic linkages between formal and informal educational options, there is a need for a compelling community-wide vision for Jewish education and the resources needed to achieve it.
- Compelling and systemic visions for Jewish education are more likely to be implemented if they are created by transformative community change strategies.
- Educational transformation change initiatives address three factors: 1) substantive areas to be changed; 2) people; and 3) process.
- Transformation change cannot be done unless the parties who have a direct or indirect influence on the achievement of the desired outcomes are mobilized during the creation and implementation of the vision, desired outcomes and implementation plan.
- Transformational change initiatives for Jewish education are increasing in their number and their impact on formal and informal Jewish education.

- A customized participatory evaluation model that is based on a program logic model is needed when evaluating the substantive and change leadership outcomes of a transformative change initiative.

ANNOTATED BIBLIOGRAPHY

TRANSFORMATIVE CHANGE

The following books are essentials texts for both change practitioners and organizational and community leaders who want to know how to effectively achieve meaningful and sustainable change in Jewish education.

Ackerman, L. & Anderson, D. (2001). *The Change Leader's Roadmap: How to Navigate Your Organization's Transformation.* San Francisco: Jossey-Bass.

Anderson, D. & Ackerman, L. (2001). *Beyond Change Management: Advanced Strategies for Today's Transformational Leaders.* San Francisco: Jossey-Bass. These books provide the theories, step-by-step change processes and leadership approaches needed to design and implement transformational change initiatives. The books include user-friendly worksheets, questionnaires, guidelines and assessment instruments.

Creighton, J. (2005). *The Public Participation Handbook.* San Francisco: Jossey-Bass. This book is a practical guide to designing and leading inclusive participatory projects and initiatives. It is a toolkit that includes practical advice, checklists, worksheets and illustrative examples.

Dannemiller Tyson & Associates (2000). *Whole Scale Change.* San Francisco: Berrett-Koehler Publishers. This book combines transformational change theories and system theory approaches in a proven, flexible approach that aligns the visions and actions among multiple stakeholders. It shows how to rapidly engage the whole system in meeting organizational and community needs. It includes both concepts and a description of step-by-step change processes.

LARGE GROUP CHANGE METHODS

Bunker, B. & Alban, B. (2006). *The Handbook of Large Group Methods: Creating Systemic Change in Organizations and Communities.* San Francisco: Jossey-Bass. This book is authored by two of the founders of the field of large group change interventions. The second edition of this book includes a comprehensive overview of large group change theories and methods including approaches such as Appreciative Inquiry, World Café, Future Search and Open Space. Case studies illustrate the use of the methods.

Holman, P., Devane, T. & Cady, S. (2007). *The Change Handbook: The Definitive Resource on Today's Best Methods for Engaging Whole Systems.* San Francisco: Berrett-Koehler. This extensively updated second edition of a classic on large group change describes sixty-one change methods by the foremost practitioners of methods such as Appreciative Inquiry, World Café, Future Search and Open Space Technology. It includes a comparative chart that helps readers determine which methods would work best for their situation. The book also provides guidance on how to customize the approaches.

EVALUATION OF TRANSFORMATIVE CHANGE INITIATIVES

Auspos, P. & Kubisch, A. (2004). *Building Knowledge about Community Change: Moving Beyond Evaluations.* New York: Aspen Institute. This publication shares what the Aspen Institute has learned about evaluating community-based initiatives and using that knowledge to enhance both the community-based change and how to increase learning in the future. *www.aspenrountable.org*

GRANTMAKING FOR COMPREHENSIVE IMPACT

Connor, J. & Kadel-Taras, S. (2003). *Community Visions, Community Solutions: Grantmakng for Comprehensive Impact.* Saint Paul: Amherst Wilder Foundation. Based on five years of research and hands-on experience, the book includes fresh ideas, concrete strategies, compelling case studies and wisdom from the field on how to improve collaboration between organizations and the community who are working on transformative change initiatives. It presents bold steps that funders, providers and community partners can do to create effective cross-organization alliances between funders and providers, and institutional and community leaders.

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