

In February 2004 the College-Institute began a comprehensive strategic planning process in order to focus priorities for its programs and resources, address concerns of the accrediting bodies, create and establish a vision of HUC-JIR's future, and clarify its decision-making processes. The charge to the Strategic Planning Steering Committee has been to create a strategic plan that will be supported by a sustainable financial framework, building on

College-Institute, and members of the Strategic Planning Steering Committee met in Aspen, Colorado, to work together on the development of a long-term strategic plan. The theme of this retreat was "Journey," and it was co-chaired by Board of Governors members Nicki Tanner and Bonnie Tisch. Opportunities for worship and Shabbat study enriched the series of six strategic planning sessions. These workshops were designed to set the context for the overall plan-

Institutions – What Works and What Doesn't Work (moderator Barbara Friedman, panelists John Golden (Colgate), Frances Hess (Vassar), Nicki Tanner (Wellesley)

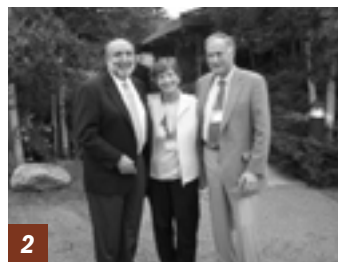
- Working Board Session – *Developing and Applying Criteria for Decision-Making*
- Working Board Session – *One Institution, Multiple Campuses and Programs – Exploring the Challenges and Opportunities*
- Closing Session – *Imagining Success*

the recommendations and areas of study honed in on the stated goal of *Achieving Excellence*, which was defined by Rabbi Ellenson as "training authentic and effective professionals to serve the Jewish people."

Strategic Decisions and Recommendations for Immediate Action

The working sessions of the Aspen Retreat provided the participating Board members with an opportunity to work with the Strategic Planning Steering

STRATEGIC PLANNING UPDATE



At Shabbat lunch in Aspen: 1. Gregory N. Brown and Barbara Friedman (Co-Chairs of the Strategic Planning Committee) with Bonnie Tisch (Co-Chair of the Aspen retreat). 2. Rabbi David Ellenson with Nicki Tanner (Co-Chair of the Aspen retreat) and Harold Tanner. 3. Richard J. Scheuer and Joan Scheuer. At Shabbat dinner at the Aspen home of Leslie and Abigail Wexner: 4. Leslie Wexner, Gideon Kaufman, and Rabbi Ellenson.

the strengths of the institution. The Strategic Planning Steering Committee has engaged in deep conversations about the most critical challenges facing HUC-JIR. It has gathered extensive amounts of data about HUC-JIR's programs, along with information about their strengths and weaknesses. In addition, a team from the Strategic Planning Steering Committee has conducted site visits to each of the four campuses, providing an opportunity to speak about strategic issues with faculty and staff in small group sessions. These site visits have been augmented by a survey of HUC-JIR students.

From August 3-7, 2005, members of the Board of Governors, senior administration of the

ning efforts, to engage the Board in the key discussions of the Strategic Planning Steering Committee, and to reach consensus on the critical questions that are emerging in this process. Shifra Bronznick, Strategic Planning Consultant, facilitated these interactive sessions. The sessions included:

- Panel Discussion - *Jewish Life in the 21st Century: How the Changes are Changing Us* (Panelists included Dr. Steven M. Cohen, Rabbi Lawrence A. Hoffman, and Rabbi/Cantor Angela Warnick Buchdahl)
- Working Board Session – *Achieving Excellence* (with introductory remarks by Rabbi David Ellenson)
- Panel Discussion – *The Change Process at Other*

"The retreat participants were quite focused, diligent, and candid in these sessions," noted Barbara Friedman, Co-Chair of the Strategic Planning Committee. "As a result, we were able to discuss complex issues with clarity and thoughtfulness. Our thinking was challenged, strengthened, and refined during the course of the five days."

At the final session of the retreat, *Imagining Success*, Strategic Planning Steering Committee Co-Chairs Barbara Friedman and Gregory Brown were able to provide a clear summary of the strategic decisions that were reached during the retreat as well as identify areas that the Committee would review in depth prior to the completion of the strategic planning report. All of

Committee to mine more deeply into areas that have arisen through the Committee's work to date, and to help shape recommendations for the future. In the next few months, the Steering Committee will augment this work with surveys of HUC-JIR alumni in the field as well as surveys of other key external constituencies. Based on the prior work, as well as the discussions at the Aspen Retreat, the following strategic decisions and recommendations can move forward:

1. Apply Consistent Criteria to Evaluate Programs and Activities

The Steering Committee developed a draft set of decision-making criteria to standardize the

evaluation process for existing and new programs. The initial draft criteria were reviewed at faculty meetings during several site visits. During Friday's Working Board Session – *Developing and Applying Criteria for Decision Making* – these draft criteria were tested through case studies on existing situations at HUC-JIR. As a result of the highly interactive discussions about the case studies, the criteria were reframed and presented at the closing session of the retreat. The criteria were divided among institutional objectives, financial sustainability, and external factors. The administration and the Strategic Planning Steering Committee will apply

excellence and is a high priority in the emerging strategic plan.

3. Implement a Comprehensive Student Recruitment Strategy to Attract the Best Students Possible for Each of Our Professional Programs

Our programs are now in competition with graduate programs in Judaic studies, and there is also a lessening of interest in Jewish professional careers. In order to achieve excellence and attract highly qualified students, HUC-JIR will need to do more to identify potential students and interest them in our programmatic offerings. This effort will require further work to

ings of the Strategic Planning Steering Committee, it became clear that elements of leadership training are captured in a variety of courses, but overall leadership development is not formally infused in the curriculum of each professional program. The Steering Committee had also been asked to explore the idea of the creation of a separate program leading to a master's degree in Jewish leadership. As a result of these discussions Provost Norman Cohen convened a two-day "Leadership Institute" in July 2005. At this Institute academics from other institutions, directors, and leaders of Jewish agencies, and members of HUC-JIR's faculty discussed

In-Israel Programs have not been sufficiently integrated into the overall curriculum on the state-side campuses. During Thursday's session on "*Achieving Excellence*," these issues were discussed, and there was general agreement that this concern must be addressed through the strategic planning process. During the discussion on "one institution, multiple programs," it was noted that working on the relationship of Year-In-Israel to the overall program can serve, in part, as a pilot project that will clarify the obstacles and opportunities for greater integration between programs. As a result, work is underway to develop a plan to clarify and communicate the goals of



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At the Wexner home: 5. Suzanne Teller, H. Jerome Lerner, Terry Rosenberg, Jerome S. Teller, Laurie F. Lieberman, and Mimi Lerner. 6. Sam and Ruth Perelson and Howard Bernstein. 7. Rabbi David M. Posner and Frances Hess. 8. Burton Lehman, Nina Hanan, Robert M. Blatt, and Charles H. Tobias.

the new decision-making criteria to existing academic programs, co-curricular programs, and centers. The deans, program directors, and members of the faculty will be invited to participate in this review process as well.

2. Strengthen Excellence by Implementing a Process of Ongoing Assessment for HUC-JIR Students

HUC-JIR seeks to attract and retain a high caliber of students in its professional programs. This desire for excellence must be reflected in admissions standards and testing at key junctures during a student's academic career and, certainly, prior to ordination. This initiative is seen as a critical building block towards achieving

track admission prospects, target marketing efforts, purchase a comprehensive database system, and develop attractive, yet sustainable financial aid policies. It is expected that a more rigorous and comprehensive recruitment strategy will reap long-term benefits for HUC-JIR.

4. Infuse a Leadership Component Throughout the Curriculum of HUC-JIR Professional Programs

As Rabbi Ellenson has noted, a significant part of achieving excellence is the development of authentic and effective Jewish professional leaders. During the academic program review, and in subsequent discussions in meet-

ings that HUC-JIR could better contribute to the development of Jewish professional leaders. The outcome of this two-day leadership institute was a strategic decision to incorporate formal leadership training elements in the curriculum of existing programs. Given the importance of integrating leadership development into existing programs, it was decided that further discussions regarding a new master's in Jewish leadership program will be deferred to a later date.

5. Integrate More Fully the First-Year Programs in Israel into the Curriculum

The site visit report and the analysis of the student survey point out that the required Year-

the first-year programs in Israel and integrate them fully into the Jerusalem and stateside curricula. The goal is to establish firmly these programs as an integral part of the overall curriculum and assure a more seamless educational process for HUC-JIR students.

6. Attract and Retain Talented Faculty by Developing a Comprehensive, Flexible, and Affordable Compensation Philosophy for Faculty and Staff

Members of the Compensation Subcommittee of the Strategic Planning Steering Committee – in partnership with the faculty, deans and administration – are expected to develop a holistic compensation and retention phi-

HUC-JIR Criteria for Decision Making

INSTITUTIONAL OBJECTIVES

- How does the program/initiative advance the mission of HUC-JIR?
- How does the program/initiative distinguish itself as excellent in its area? How can this be measured?
- How does the program/initiative benefit our students' educational experience and/or professional development?
- How does the program/initiative assist in the recruitment of top students and faculty?
- How does the program/initiative advance the academic interests of HUC-JIR's faculty?
- Do similar programs or initiatives exist at other locations of HUC-JIR?
If so, how does the program/initiative complement or augment activities on other campuses?
If not, how can the work of this program be leveraged throughout the institution?
- How does the program or initiative raise the visibility of HUC-JIR?

FINANCIAL SUSTAINABILITY

- What are the sources and uses of funds for this program/initiative and how can they be sustained over time?
- What strain or drain does the program/initiative put on existing resources:
 - Human resources (both faculty and staff)
 - Facilities
 - Technology infrastructure
 - Academic resources (library and archives)
 - Financial resources
- How can these overhead costs be covered?
- How can the program be used to attract permanent funding to HUC-JIR as a whole and to the program itself?

EXTERNAL FACTORS

- How does the program/initiative benefit our institutional partners (i.e. URJ, other educational institutions, the wider Jewish community)?
- What partnerships are needed to ensure the success of the program or initiative?
- If the program/initiative were terminated, what impact would it have on HUC-JIR, the Reform Movement and Jewish life? Can other programs or institutions fill the gap?
- How is HUC-JIR uniquely positioned to engage in this program/initiative? What other institutions or organizations are engaged in similar activities?

be positioned not only to develop leaders for existing institutions of the Reform Movement, but also to train those who can serve the broader needs of the Jewish people. The successful

development of a clear and financially sustainable strategic plan will prepare HUC-JIR to meet the challenges that exist today as well as those of the future. ■

losophy that incorporates merit pay, a formal post-tenure review process, and changes to the pension and benefit plans in order to provide a fair compensation package that the College-Institute can afford in both the near- and long-term. This plan should be flexible enough to provide access to appropriate levels of benefits to meet the varying needs of HUC-JIR's employees.

Next Steps in the Strategic Planning Process

"The role of technology is integral in the next phase of our planning," notes Barbara Friedman. "The scope will include how we use technology in our classrooms, library and

help guide the implementation of the plan, the Strategic Planning Steering Committee will be very busy during the next few months," says Barbara Friedman. "The Steering Committee will be working on the prioritization of programs and activities within budgetary constraints and facilities limitations, developing a sustainable financial model to complement the decision-making criteria, and communicating the results of its work to core constituencies, including academic and institutional partners, faculty, students, staff, and the Board of Governors."

The strategic plan itself will also include a process to monitor and



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At the Wexner home: 9. Dolores Wilkenfeld, Sheila Lambert, Marion Blumenthal, and Steven Cohen. 10. Robin Harvey (right).



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archives, recruitment, student information systems, and other administrative functions. We will weigh the relative costs and benefits of these technological options in order to determine how we can best use this available technology in order to advance our excellence as an academic institution."

As Rabbi Ellenson noted in his original charge to the Strategic Planning Committee, he expected that "some parts of the College as it now stands will surely be constricted as we move ahead. Others will just as surely be expanded, and still others will be created."

"In order to complete the strategic planning process and develop a meaningful report that will

assess the ongoing effectiveness of the implementation of the strategic plan and of HUC-JIR's programs.

President David Ellenson stated in February 2004 at the commencement of the strategic planning process, that "...as we consider the process that lies ahead, the words of *Pirkei Avot: 'Hamalakhah m'ruba'* – the tasks are many – ought to ring in our ears. And we recognize that *'Ba'al ha-bayit dobek'* – the Master is pressing..."

The tasks are indeed many, and the strategic planning process has helped to clarify the work that lies ahead. The Strategic Planning Committee has noted that the College-Institute must