ROSOV CONSULTING, LLC

Assessing the Implementation of the Design Principles of 21st Century Whole Person Learning in Jewish Congregational Settings

FINAL REPORT

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Prepared for The Jewish Education Project/ECE Leadership Team by:
Rosov Consulting, LLC
2039 Shattuck Ave., Suite 401
Berkeley, California 94704
Phone: 510.848.2502
Fax: 888.983.9825

EXECUTIVE SUMMARY

The Study

This paper reports on findings from Phase II of the research on The Jewish Education Project/ECE Leadership team's LOMED initiative in congregational schools.

The Jewish Education Project, the Experiment in Congregational Education, and the Leadership Institute of JTS and HUC-JIR have been working with over 50 congregations in the New York metropolitan area – which make up the Coalition of Innovating Congregations. LOMED (Learner Outcomes and Measurement for Effective Education Design), a project of this collaborative effort, fosters a deep rethinking of the structure, orientation and nomenclature of learning in congregational contexts. Participating congregations are encouraged to employ models of *whole person learning* that are grounded in design principles of 21st Century Jewish education: 1) learning will be anchored in caring purposeful relationships; 2) learning will seek to answer the questions, challenges, and meaning of everyday life; 3) learning will enable individuals to construct their own meaning through inquiry, problem solving, and discovery; and 4) learning will be content-rich and accessible.

In a previous phase of work, a team from Rosov Consulting studied a sample of LOMED congregations with the aim of gaining insight into their programs. The three main objectives at that time included understanding how design principles were being implemented, analyzing opportunities and constraints of implementation, and developing a protocol for assessing the quality of educational experiences operationalized through these design principles.

This second phase of the study answers two broad questions:

1. *To what degree are the four design principles of 21st Century whole person learning being implemented within alternative models for congregation-based Jewish education, as compared with traditional models of Jewish education? Specifically, how extensively have these four design principles been implemented in learning activities that have been supported by LOMED resources?*

2. *What has enabled the implementation of the principles of 21st Century whole person learning, and what has limited the implementation of the principles?*

In this phase of the study, a total of 79 observations were conducted of both LOMED and non-LOMED activities. Protocols and observational reports were completed for each visit. Protocols rated the implementation of the four design principals on a scale of 1-4. Observational reports provided accounts of the content of the observation. The data were then analyzed both quantitatively and qualitatively.

This report focuses on the major findings in comparing the implementation of the four design principles. As well, there is a discussion of the different factors that influence the extent of implementation.

Findings

Design Principle Implementation

The data collected from the protocols assessed the degree to which each design principle (DP) was implemented. The results were then analyzed by comparing DP implementation across different educational contexts and in relation to different variables.

a. Comparing activities in different settings

The research team compared LOMED funded activities, with both Non-LOMED funded activities in congregations that receive LOMED funding, and Non-LOMED congregations. We found that LOMED funded learning activities in LOMED congregations consistently implemented the design principles more fully than did either of the other two groups. Among the other two groups, on average, all four design principles were implemented more fully in activities within Non-LOMED congregations than in the non-LOMED funded learning activities in LOMED congregations.

b. Comparing denominations

Comparing the implementation of the design principles across Conservative and Reform congregations, we found that, on average, DP1 (developing caring relationships) and DP4 (rich content) were more highly implemented in Conservative congregations. DP2 (seeking answers to the questions of everyday life) and DP3 (the construction of meaning) were more fully implemented in Reform congregations. It seems that the educational models in these Conservative congregations have been influenced by synagogue cultures that

place emphasis on the development of Jewish skills. By contrast, the models in Reform congregations seem to have been influenced by cultures that emphasize meaning-making and the search for relevance.

c. Comparing different educational practices (models)

Throughout our observation of learning activities in LOMED congregations, the research team noted the prevalence of three types of educational practices within the alternative models that congregations employ, and that were strongly related to the implementation of the design principles:

(i) **Real-time learning:** This type of practice takes place in real-time rather than in an artificially designated setting. This includes, for example, having an opportunity to make sense of *shacharit* as part of a Shabbat morning service rather than in a class conducted on a weekday afternoon, or learning about *tikkun olam* by volunteering in a soup kitchen.

(ii) **Family activities**: This type of practice conceives of the family as the learner rather than conceiving of the child in isolation as the educational client. Sometimes this practice is expressed in joint family learning and sometimes in parallel programs.

(iii) **Near peer activities**: This type of practice is grounded in relational elements that connect young people of different ages, and that expose younger children to near peer role models. This practice is frequently manifested in older students acting as teachers or guides for younger students.

Consistently, all four design principles were more fully implemented in the activities that involved one of these three types of practices than they were in activities that didn't.

d. Comparing Full-Time with Part-Time Facilitators

Activities involving full time facilitators consistently implemented the design principles more fully when compared to those activities presented by part time facilitators. This pattern confirms what was suggested to our team by program administrators: that the employment of full-time learning facilitators increases the likelihood of implementing the design principles probably because such educators are better informed about and more experienced in the practices of whole person learning.

A Framework for Understanding Effective Change

We identified three forces that enable or impede the implementation of the principles of whole person learning. These forces operate at three different orders of scale and with different degrees of flexibility.

i. **Contextual factors**: These forces cannot be changed without a complete overhaul of the congregational culture. Contextual factors include denomination, location, etc.

ii. **Intensifiers**. Less fixed than the contextual factors, there are other broad forces that shape the implementation of the design principles. We call these forces intensifiers because they have potential to inform the implementation of the design principles across the congregation, through, for example, full-time educational directors, full time facilitators, or extensive professional development.

iii. **Educational models**: As described above, the design principles are fully aligned with the assumptions of these educational practices. Other models where the same practices likely operate in similar ways create a fertile environment in which the design principles can more readily be implemented.

Our data suggest that use of appropriate educational models exerts greater influence on the implementation of the design principles than any other tier of forces. The differences the research team found between activities that employ these alternative models and those that did not were greater than in any other set of comparisons that the research team conducted. This suggests – although this is a conclusion that needs further testing – that the most readily altered forces – the models and practices that educators choose to employ - may also have the greatest influence on the implementation of the design principles.

Implications

In considering how to extend implementation of the design principles to a greater number of educational models and activities in the congregations, our data indicate that when educational approaches are carefully grounded in clear and well-conceived educational models they can result in different, alternative, ways of doing things. This is likely why alternative models are correlated with higher levels of implementation of the design principles. The findings suggest that in contrast to approaches that focus on professional development for teachers or on transforming the entire congregation, it is possible to achieve substantial educational change through a middle path focused on new models.

One promising means for supporting the process of educational change, and for scaling up the kinds of educational practices that LOMED seeks to nurture, is provided by the very protocol developed as part of this study for the purposes of evaluation. Because the protocol offers such a precise detailing of the components of good practice, it can be more than a tool for evaluation; it can also be a tool for teaching and design. When, for example, Education Directors work with learning facilitators to develop their practice, they can use the protocol to structure the content of their conversations and to stimulate the self-examination of educational practice.

Conclusions

Our 79 observations found that the four design principles of 21st Century whole person learning are being implemented to widely varying degrees in the 12 congregations we observed, ranging from limited to high levels of implementation. Furthermore, the implementation of different design principles is fully possible alongside one another. Our observations point to a definitive conclusion: ***the four design principles of 21st century whole person learning are being more fully implemented within alternative models for congregation-based Jewish education than in traditional models for congregation-based Jewish education.*** Despite sampling constraints, consistent patterns of differences were seen between alternative and traditional models of Jewish education.

BACKGROUND

The Jewish Education Project, the Experiment in Congregational Education, and the Leadership Institute of JTS and HUC-JIR have been working with over 50 congregations in the New York metropolitan area – which make up the Coalition of Innovating Congregations. This works aims to promote holistic Jewish education for children and families that focuses on learners' knowledge, belief, values, actions, and sense of belonging. LOMED (Learner Outcomes and Measurement for Effective Education Design), a project of this collaborative effort, fosters a deep rethinking of the structure, orientation and nomenclature of learning in congregational contexts. Participating congregations are encouraged to employ models of ***whole person learning*** that are grounded in design principles of 21st Century Jewish education: 1) learning will be anchored in caring purposeful relationships; 2) learning will seek to answer the questions, challenges, and meaning of everyday life; 3) learning will enable individuals to construct their own meaning through inquiry, problem solving, and discovery; and 4) learning will be content-rich and accessible.

These design principles are grounded in a Deweyan notion of social constructivism. This **alternative** approach to learning places the learner at the center of inquiry and meaning making, it emphasizes relationships, real-world experience and life-relevant tasks, and creates the groundwork for life-long learning.[1] This alternative model is in stark contrast to **traditional** 'banking' modes of learning that engage atomistic individuals, conceive knowledge as static and unchanging through the learning process, and where the content and process of learning is determined based on what is deemed significant by the educator, rather than by the needs and interests of the learner.[2] The first three design principles that have guided the LOMED initiative are drawn from Woocher, et al[3] who argue that these principles "simultaneously build upon and challenge the current reality in Jewish education." The fourth design principle was introduced by the The Jewish Education Project/ECE Leadership team in order to emphasize the centrality of rich Jewish content in congregational learning.

LOMED provides training, handbooks, funding, coaching and a rich network of colleagues to help participating congregations design, measure, assess and sustain learning in the context of innovative, high quality educational models. The congregations that participate in LOMED are diverse in terms of size, varying from 100 to more than 1500 families, and denominational identification, including Reform, Conservative, Reconstructionist, and Unaffiliated congregations.

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[1] Schoen, L. & Fusarelli, L. (2008). Innovation, NCLB, and the Fear Factor. The challenge of Leading 21st-Centruy Schools in an Era of Accountability. *Educational Policy 22*, 1: 181-203;.
[2] Friere, P. (1998) *Pedagogy of Freedom: Ethics, Democratic and Civic Courage.* Rowman and Littlefield: Lanham, Mayland.
[3] Woocher, J. S., Woocher, M. & Rubin Ross, R (2001). *Design Principles for 21st Century Education.* Lippman Kanfer Institute Working Paper, Redesigning Jewish Education for the 21st Century. Coalition for the Advancement of Jewish Education (CAJE): http://www.bjpa.org/Publications/details.cfm?PublicationID=2163

Studying LOMED

The Jewish Education Project/ECE Leadership team has been engaged in ongoing practitioner reflection and data gathering since the project's inception. In early 2012 The Jewish Education Project/ECE Leadership team approached Rosov Consulting to conduct a study of the LOMED initiative. Through a series of intensive meetings and deliberations, Rosov Consulting developed a two-phased program of research designed to generate both theoretical frameworks and empirical data speaking to the implementation of whole person learning in the congregational setting. The first phase of the research was carried out from March to September 2012. The primary goal of Phase I was to engage in *exploratory study* of a purposive sampling of LOMED congregations to:

1. More fully understand how the design principles are being enacted in congregational settings;
2. Analyze the opportunities and constraints in implementing some or all of these principles;
3. Begin to develop robust protocols for assessing the extent and quality of the educational experiences that operationalize these principles.

The Rosov Consulting team pursued these goals through various means and methodologies including: 1) conducting a comprehensive review of the literature on 21st Century learning in general education and in the cognate field of religious education; 2) interviewing experts in those fields; 3) reviewing extensive documentation of LOMED developed by the Jewish Education Project/ECE Leadership team and participating congregations; 4) conducting pre-site interviews ("nesting conversations") with Education Directors of congregational study sites; 5) developing a working draft observation protocol to be piloted in the field as part of the exploratory study ; 6) planning for and conducting on-site observations of educational experiences; and 7) conducting post-observation interviews with key educational staff and consultants at each study site.

In this initial phase of the study, the research team conducted on-site observations at seven congregations, roughly one-quarter of those participating in the LOMED initiative, during the spring semester 2012. The study sample was designed to be diverse in terms of congregational size, denominational affiliation and geographic location, and prioritized the inclusion of congregations that most fully implemented the design principles.

A "meaning making" convening was held in June 2012 in order to discuss the study findings and to gain insight from a mixed group of practitioners and leaders in congregational education. During the summer of 2012, the Rosov Consulting team worked intensively with a diverse working group of congregational

educators and LOMED consultants to substantively revise the draft observation protocol that had been developed during Phase I. A final report of the processes engaged during and findings resulting from the initial phase of the study was submitted on September 9, 2012.

As a bridge to Phase II of the overall program of research, the research team field-tested the revised observation protocol in two visits to each of two LOMED sites during the fall of 2012. These observations, conducted by both a Rosov Consulting associate and a LOMED consultant, provided an opportunity to assess inter-rater reliability and to further refine the protocol. This iterative process afforded the Rosov Consulting team the opportunity to create, refine, modify, and test data-gathering tools in collaboration with the Jewish Education Project/ECE Leadership team, while continuing to gather ever richer and increasingly nuanced information.

In addition to piloting the protocol during the bridge phase, Rosov Consulting worked closely with the Jewish Education Project/ECE Leadership team to plan the deployment of Phase II of the inquiry.

Phase II of the program of research began in January 2013. Using the observation protocol created during Phase I, and piloted and refined during the Bridge Phase, Phase II sought to answer two broad questions:

1. *To what degree are the four design principles of 21st Century whole person learning being implemented within alternative models for congregation-based Jewish education, as compared with traditional models of Jewish education? Specifically, how extensively have these four design principles been implemented in learning activities that have been supported by LOMED resources?*

2. *What has enabled the implementation of the principles of 21st Century whole person learning, and what has limited the implementation of the principles?*

This report focuses on the findings and insights generated through Phase II.

SAMPLE, METHODS, AND LIMITATIONS

Sample

Twelve congregations were selected to be studied during Phase II. Nine of these congregations were active in LOMED or LOMED Chadash (a more recent cohort of institutions to participate in the LOMED initiative). These congregations were selected because they were recognized by the Jewish Education Project/ECE Leadership team as incorporating alternative educational models to a moderate or high-degree in their educational activities. The remaining three congregations selected to participate in the study were non-LOMED congregations; they were selected because of their reputation for providing high quality educational experiences. The presence of non-LOMED congregations within the sample offered an important point of comparison to determine the impact of the provision of LOMED's various resources on congregational learning. Across the sample, the congregations were diverse in size, denomination, and geographic location. (For a full list of congregations in the study frame, please see Appendix I).

Method

As had been the case in the previous phases of the research, the study included two main components; **nesting conversations** with educational leadership in the congregations, and **observations** of educational activities. The content of observations was recorded in **qualitative reports** and evaluated using an **observation protocol**.

Developed during the earlier phases of the study, and now uploaded to an online format, the observation protocol was constructed around Woocher's working paper entitled *Design Principles for 21st Century Jewish Education.* [4] Designed in collaboration with the Jewish Education Project/ECE Leadership team and congregational educators, the research team concretized each of the design principles into a set of discrete, observable components. During the course of an observation, each component was scored on a scale of 1-4 ("not implemented," "implemented to some degree," "implemented according to the expectation described," and "implemented to a high degree") or marked as "not possible to observe in this learning activity." Aggregate scores were produced indicating the level of implementation of individual design principles or whole person learning writ large.

[4] Woocher, J. S., Woocher, M. & Rubin Ross, R (2001). *Design Principles for 21st Century Education.* Lippman Kanfer Institute Working Paper, Redesigning Jewish Education for the 21st Century. Coalition for the Advancement of Jewish Education (CAJE): http://www.bjpa.org/Publications/details.cfm?PublicationID=2163

In procedural terms, ahead of the first observation at a congregation, the research team held a **nesting conversation** with the congregation's Education Director. This semi-structured interview explored the contextual factors that have an impact on learning in the congregation, the manner in which the design principles are implemented, and the deployment of LOMED resources provided by the Jewish Education Project/ECE Leadership team. During this conversation, the research team jointly determined the set of learning activities to be observed. In each LOMED congregation, observations included both LOMED-funded learning activities as well as non-LOMED funded activities.[5]

The research team conducted site visits between two and four times at each of the twelve congregations. When possible, the research team observed the same group of learners on multiple occasions in order to gain a fuller picture of their learning experience. One of three LOMED consultants accompanied a member of the Rosov Consulting team at approximately one third of the observations, offering a check on inter-rater reliability for the observation protocol, and providing an important sounding board for more general insights and questions. For each learning activity, all observers completed the **observation protocol** and entered the scores into an online database. In all, 59 protocols were completed in LOMED congregations and 20 in non-LOMED congregations. (The observation protocol utilized during these observations is found in Appendix II.)

The research team analyzed the quantitative data derived from the observation protocol using both Excel and SPSS. This analysis produced an aggregate score for each of the four design principles as well as an overall score calculated as an average of all four design principles. This overall score reflects the overall quality of design principle (DP) implementation for an activity. As will be seen below, the five scores – an aggregate for each design principle and the overall score – were then used to compare observations of different models of learning (alternative and traditional), denominations (Reform and Conservative), types of congregations (LOMED or non-LOMED), as well as other categories.

In addition to the quantitative data derived from the use of the protocol, **qualitative reports** were written for each learning activity observed. (See Appendix III for the script specifically developed for this phase of the study so as to report on qualitative data.) These reports offered more textured accounts of the learning activity including details about the congregation, congregational learning, the learning facilitator, etc.

[5] To clarify, at the broadest level, observations compared so-called LOMED congregations with non-LOMED congregations, that is, congregations that had not participated in some form of the LOMED initiative. More narrowly, within the LOMED congregations, activities supported with resources from the LOMED initiative (what for shorthand we have called LOMED-funded activities) were compared with activities not supported with resources from LOMED. At the same time, as will be seen below, within LOMED congregations a comparison was also made between activities conceived as "alternative" (designed in line with child-centered and constructivist educational principles) and those conceived as "traditional" (those that employed transmission or banking modes of educational practice) irrespective of whether or not they were supported by LOMED resources.

Finally, during and following the observations the research team consulted with the Education Director and learning facilitator (the educator facilitating the activity being observed) in order to triangulate data. Combining qualitative and quantitative data offered an important check on the data to ensure congruence between observations and scoring, while these additional conversations help validate any conclusions reached during the observations.

Limitations

While these methods have made it possible to answer the research questions that prompted this study, the generalizability of the findings reached are limited by the following factors:

- ***A small sample***: With multiple factors weighing on implementation (denomination, size, geography, resources, etc.), the small sample size – nine LOMED congregations and three non-LOMED congregations – limits the generalizability of findings. Similarly, the limited number of observations – 59 in LOMED congregations and 20 in non-LOMED congregations – limits the types of statistical analysis that may be utilized.

- ***A convenience sample***: Congregations had the opportunity to opt-out of the study. In many respects, the sample represents those congregations that were easily accessible and willing to participate.

- ***No conventional control group and no baseline***: The non-LOMED congregations were selected based on their reputations for high quality education. They serve as a useful point for comparison but they do not constitute a conventional control group against which to compare the impact of the LOMED interventions. Similarly, because of the timeline of the study, a baseline for implementation of the design principles was not established. This is to say, the study represents a snapshot of implementation and cannot comment on any previous expansion or contraction in design principle implementation within the sites studied.

- ***Unit of Analysis***: The unit of analysis in this study is the learning activity engaged in the classroom, not the congregational culture. While the nesting conversations and qualitative observations do add context, the study is not an analysis of the congregational culture that impacts whole person learning. This limitation is discussed in a later section.

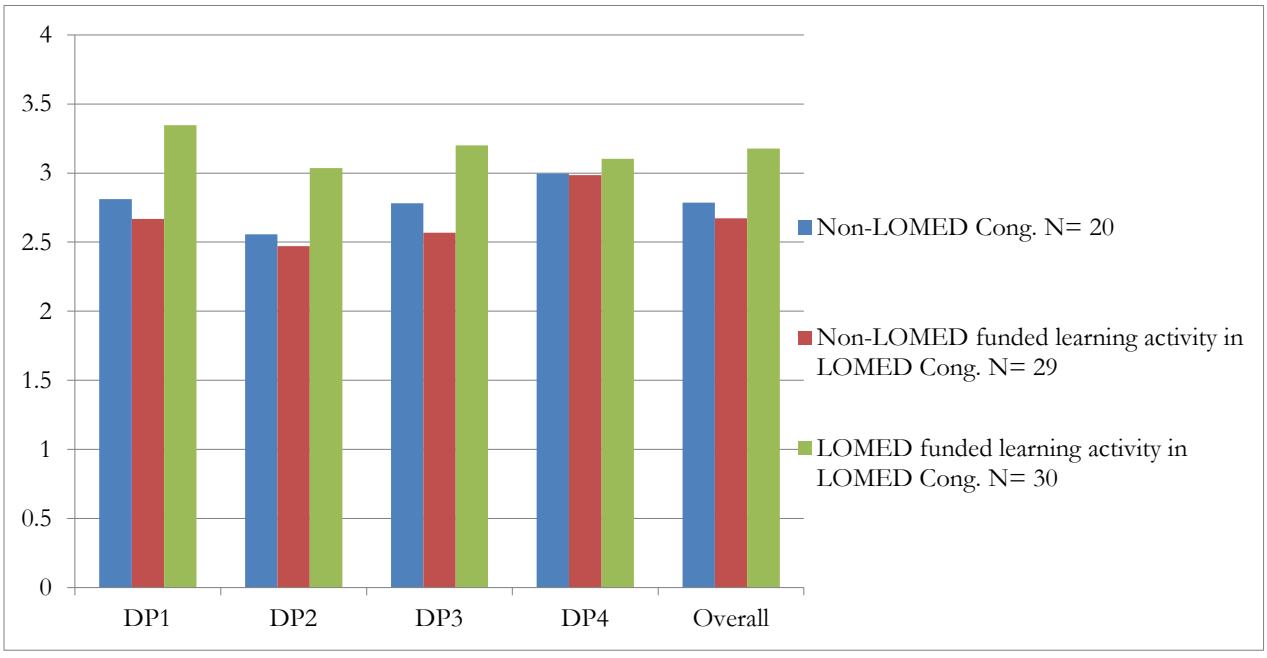
IMPLEMENTATION OF THE DESIGN PRINCIPLES: COMPARING ALTERNATIVE AND TRADITIONAL MODELS

Comparing LOMED with Non-LOMED Models

In order to respond to the central research question *"to what degree are the four design principles of 21st Century whole person learning being implemented within alternative models for congregation-based Jewish education, as compared with traditional models of Jewish education?*," the research team classified the learning activities as follows:

1. ***Learning activities in non-LOMED congregations:*** Any activity observed in a congregation that has not received LOMED funding or other LOMED resources.
2. ***Non-LOMED learning activities in LOMED congregations:*** Learning activities that are not funded by a LOMED grant but that take place in congregations that received LOMED resources. In these instances, the learning facilitator involved may have participated in professional development at the congregation involving exposure to the design principles or other features of alternative educational models.
3. ***LOMED learning activity in LOMED congregations:*** Learning activities currently or once funded by a LOMED grant. By definition (conditioned on the terms of the LOMED grant), this is an activity employing an alternative rather than traditional educational model.

Figure 1: Comparing Implementation between LOMED and Non-LOMED



As seen in Figure 1, LOMED funded learning activities in LOMED congregations consistently scored higher than either of the other two groups.[6] Next highest, on average, across all four design principles were models in Non-LOMED congregations. The Non-funded learning activities in LOMED congregations consistently scored lowest.

Although the sample size of each group is not large enough to determine whether the differences between these average scores is statistically significant, the consistency of the differences across all of the design principles is strongly suggestive. Indeed, it may be that the consistency of these differences across all four design principles may indicate more decisively than any other finding the relatively higher implementation of the design principles in LOMED funded activities.

Of course, it might not seem surprising that LOMED funded activities were found to implement the design principles to a higher degree than the other subgroups; after all, these activities were designed with the design principles in mind. The critical finding uncovered here is that these design intentions were indeed carried out consistently with respect to all four design principles. Such an outcome is far from inevitable in complex educational contexts where constraints such as lack of time, unqualified educators or confusion about purposes can impede implementation.

It is less clear why learning activities in non-LOMED congregations consistently displayed the second highest level of design principle implementation. The non-LOMED congregations included in this study were chosen for their reputations as having strong educational programs; this may account for the high degree to which they were able to implement the design principles. Other possibilities may include the professional background of the Directors of Education, their training, or their earlier experience in LOMED congregations. As well, many of the design principles might simply be considered elements of good educational practice and not unique to those specifically directed at incorporating 21st century whole person learning.

Non-funded activities in LOMED congregations consistently scored lower on all four design principles compared to the other subgroups. This finding lends itself to multiple interpretations. Absent baseline data for levels of implementation of the design principles before the congregation's involvement in LOMED, it is unclear whether there may or may not have been a spillover from LOMED funded activities to non-funded

[6] The variance between the three samples in DP4 is significantly less than for the other design principles, with the score for DP4 being nearly identical in all three cases. It is notable that in the area of content – an area often thought of as a divergent point between the kind of learning taking place in traditional and alternative models – the two models score so closely. This similarity may result from the application of a scoring system based on a definition of 21st Century Learning literacy to both LOMED-funded and non-LOMED funded learning activities. To better understand the components of DP4, please see the protocol in Appendix II.

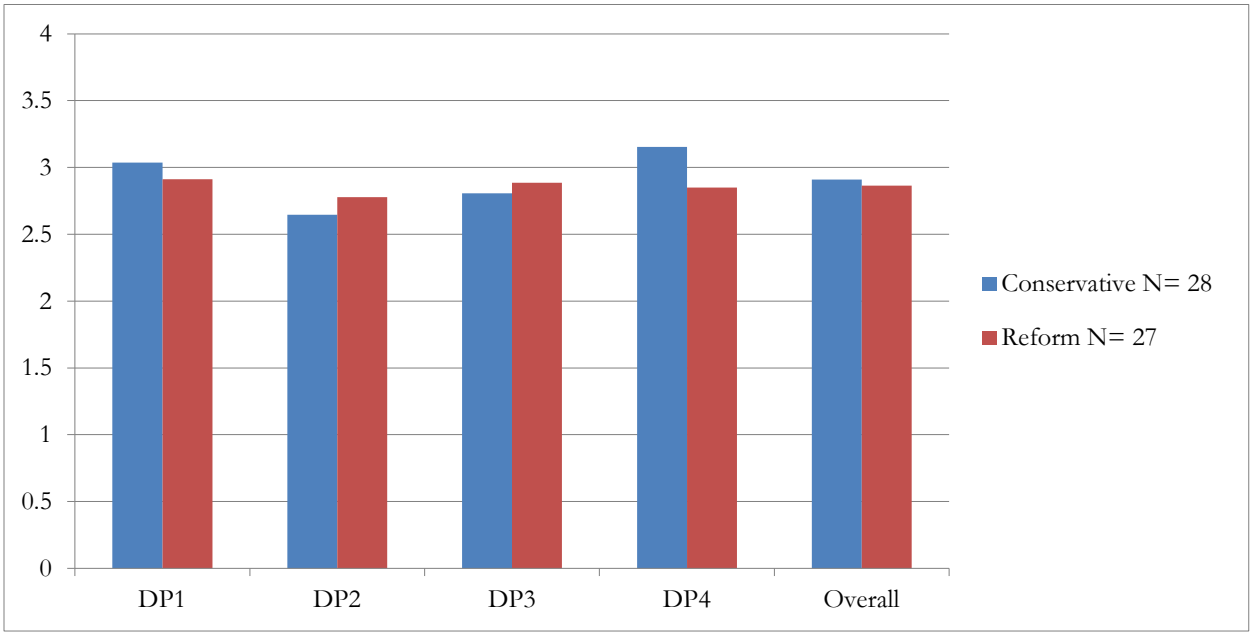
activities. The research team is unable to know, for example, whether design principle implementation might have been even lower if the congregation had not been involved in LOMED. That said, our nesting conversations with Education Directors in these congregations do not suggest that the learning facilitators of these non-funded activities were encouraged to design their activities with the design principles in mind in the same way that their colleagues, facilitators of LOMED funded activities, were required.

Irrespective of these uncertainties, there is sufficient evidence to indicate that overall the design principles are being consistently implemented to a greater degree in LOMED activities than in other activities.

Comparing Models in Reform and Conservative Congregations

Among the LOMED congregations that participated in the study there were four Conservative congregations and four Reform congregations. This balanced sample makes it possible to compare the implementation of the design principle across these two denominations.

Figure 2: Comparing Implementation between Reform and Conservative Congregations



As seen in Figure 2, on average, DP1 (developing caring relationships) and DP4 (rich content) were more highly implemented in Conservative congregations. On average, DP2 (seeking answers to the questions of everyday life) and DP3 (the construction of meaning) were more fully implemented in Reform congregations. These general patterns are suggestive. They seem to indicate that the educational models in these Conservative congregations have been influenced by synagogue cultures that place emphasis on the development of Jewish skills. By contrast, the models in Reform congregations seem to have been influenced by cultures that emphasize meaning making and the search for relevance. In a later section, we will discuss the implications of difference such as theses that derive from the most fundamental features of the congregational context.

Comparing Types of Educational Practice

Throughout our observation of learning activities in LOMED congregations, the research team noted the prevalence of three types of educational practices within the alternative models that congregations employ:

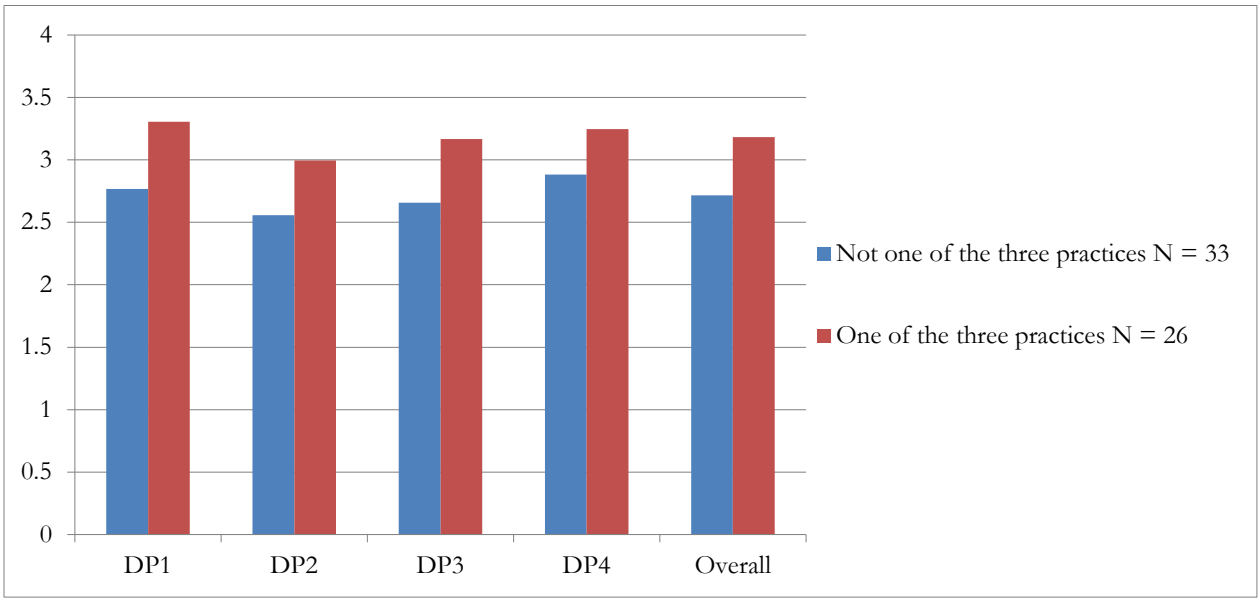
(iv) **Real-time learning:** This type of practice takes place in real-time rather than in an artificially designated setting. This includes, for example, having an opportunity to make sense of *shacharit* as part of a Shabbat morning service rather than in a class conducted on a weekday afternoon. This type of practice may include Shabbat programming, praying at the appropriate time of day, or learning about *tikkun olam* by volunteering in a soup kitchen.

(v) **Family activities**: This type of practice conceives of the family as the learner rather than conceiving of the child in isolation as the educational client. At times this conception was seen in joint family learning and at times in parallel programs. As well, family learning may extend beyond parent and child to include grandparents, siblings and others.

(vi) **Near peer activities**: This type of practice is grounded in relational elements that connect young people of different ages, and that expose younger children to near peer role models. In multiple activities the research team observed older students acting as teachers or guides for younger students.

Because the activities the research team observed in LOMED congregations were relatively well split between the 26 activities that employed at least one of these types of practices and 33 that did not employ any of them at all, the research team was able to explore the implementation of design principles in activities that employ these types of practices compared with those that do not.

Figure 3: Comparing Implementation across Types of Practice



As seen in Figure 3, the design principles were more fully implemented in the activities that involved one of these three types of practices described above than they were in activities that did not include one of these three practices. This pattern was consistent across all four design principles.

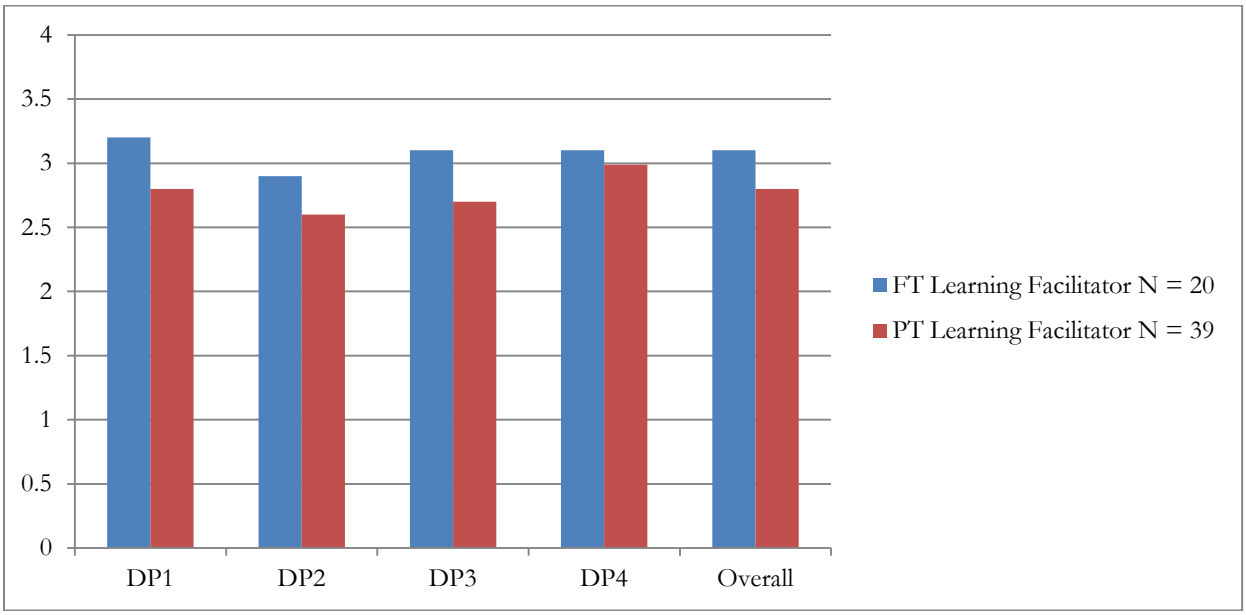
Again, this finding might appear to have been expected since the "alternative" practices were conceived so as to embody an educational approach informed by the principles of 21st Century learning. The research team suggests otherwise. Because the focus of this phase of this research was to study the *implementation* of the design principles, it was not a foregone conclusion that one would find these principles more fully implemented in such consistent fashion. That they have been implemented with so much consistency suggests that these types of practice are powerful enablers of design principle implementation regardless of the institutional constraints that can often impede implementation.

Further Comparisons of Design Principle Implementation

Data gleaned from nesting conversations at each congregation suggests that the full-time employment of Education Directors also impacts the ability of the program to implement the design principles. Unfortunately, because only two of the congregations in the study employed a part-time Education Director, there was too small a sample available for quantitative analysis, no matter how suggestive the qualitative data.

The research team was able however to explore the correlation of full-time learning facilitators with design principle implementation. In this instance, the sample was more balanced with 20 activities led by full time learning facilitators, and 39 being led by part-timers.

Figure 4: Comparing Implementation in Relation to Full-Time/Part-Time Facilitator



As seen in Figure 4, there were consistent differences in implementation in activities when there was a part-time compared with when there was a full-time facilitator[7]. This pattern confirms what was suggested by nesting conversations: that the employment of full-time learning facilitators increases the likelihood of implementing the design principles probably because such educators are better informed about and more experienced in the practices of whole person learning. It is likely that full-time faculty, at both the institutional and program level, come to the congregation with higher levels of pre-service training and experiences and, in the course of their work, receive ongoing professional development in a more robust manner than their part-time colleagues. These factors combine to buttress the ability of full-time educators to make a valuable contribution to the implementation of the design principles.

SHARPENING THE FOCUS: DIFFERENCES IN DESIGN PRINCIPLE IMPLEMENTATION

A more high resolution sense of differences in design principle implementation is gained by looking at examples of what the research team classified as "limited," "moderate" and "high" levels of implementation. These distinctions, derived from ranking the quantitative scores collected using the observation protocol, provide compelling evidence of differences in design principle implementation and what such differences mean in terms of the quality of the educational activities that learners experience. Below, alongside one

[7] Full-time facilitators observed included Coalition Educators, the Education Director, a Nadiv Educator, and other individuals who hold multiple roles in the congregation making up a full-time-equivalent educator (filling positions such as music teachers, early childhood educators, and, in one instance, a congregational museum educator). The rabbi, cantor or other fulltime employees of the congregation also fall into this category although we did not encounter them in this set of observations. Excluded from this category are those who work full-time in education – in a separate Jewish or secular setting – and who also work part-time in the congregation.

example of limited and two examples of moderate implementation, we provide two examples of high implementation so as to demonstrate the different forms that desired practice can take.

The Range of Design Principle Implementation

Table 1 below shows the lowest, highest and average score for each design principle across all of the 79 activities observed. These are obtained from an observation protocol which scored all activities and their components on a scale of 1 to 4. The lowest overall score assigned to any single activity was 1.17. The highest overall score was 3.95. The average score calculated across all of the 79 activities observed was 2.89.

Table 1: The Range of Design Principle Implementation

	Lowest observed score	Highest observed score	Average score across all activities
DP1	1.12	4	2.96
DP2	1.12	4	2.71
DP3	1.11	4	2.86
DP4	1.18	4	3.03
Overall score for an activity	1.17	3.95	2.89

These findings demonstrate the range of implementation of the design principles. They show that DP4 (concerned with rich content) was generally more fully implemented (with an average of 3.03), while DP2 (seeking questions to everyday life) was less fully implemented than the other DPs (with an average of 2.71).

In order to demonstrate what differences in the implementation of design principles look like in practice, we present five vignettes derived from field notes recorded immediately after observations. Following each vignette, we list the activity's scores and provide a rationale for both the score and the qualitative account. These vignettes are organized along a continuum from limited implementation, through moderate implementation to high implementation. In the instance of limited implementation, there is little evidence of the 21st century design principles. In the two examples of moderate implementation there is evidence of the design principles some of the time. The first of the two moderate examples relates to a highly traditional Hebrew School form (the model *seder*) where there is evidence of the educators trying to introduce some of the design principles. The second – more "successful" – example of moderate implementation is one where the educators introduce more innovative educational practices overall. The final two examples offer highly instructive, even exemplary, instances of design principle implementation at its most complete. These last two examples are instances of LOMED funded activities.

An Example of Limited Implementation

The fourth grade teacher has been teaching this class at the congregation for well over a decade. Before that she worked at another congregation in the area for over a decade. During the day she is an early childhood teacher. This non-LOMED funded learning activity takes place in a classroom that is brightly decorated, with various stations around the room – one for the days of the week, one for the Hebrew letters, another for colors, and one a poster to count the days of the Omer, etc. At the front of the class there is a poster-board with students' names and a pocket-sized envelope next to each name. In each envelope is a red, yellow and green sheet of paper. When students misbehave - by talking to one another, or out of turn - they move from green to yellow to red. Students with a red sheet showing at the end of class do not receive a candy.

The class begins with *tefilah* focused around the prayers written on chart paper. Students are asked to count the number of *Vets* in the *Ma Tovu* prayer and to look for *otiyot sofiyot* in the *Barchu* prayer. As the class progresses the students move around from station to station – describing the current weather in Hebrew, the days of the week, etc. For some stations the teacher has prepared rhymes, songs and mnemonics.

When they arrive at the wall with the Hebrew letters, the teacher asks that students spell certain English words in Hebrew. For example, students are asked to spell the word vote. One student offers a spelling – *Vet, Vav, Tav* – and the teacher asks for another possibility. She looked for all the permutations of *Vet's, Vav's, Tav's* and *Tet's*.

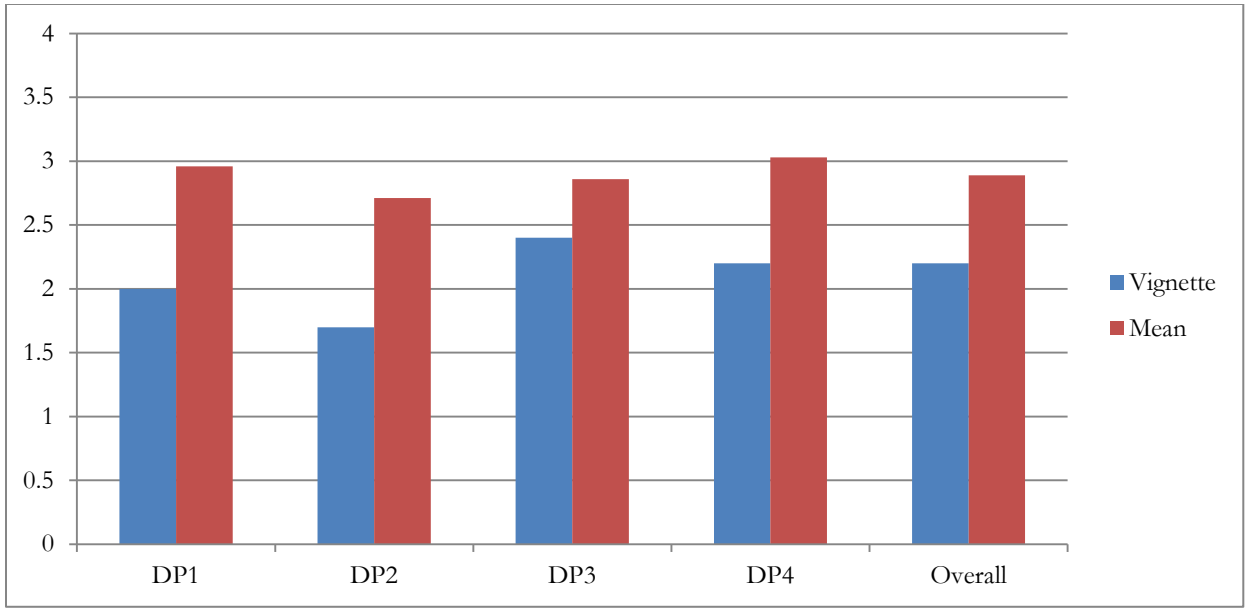
As a final activity the teacher hands out a transliterated song. Using the keyboard to hold the tune, she teaches an echo song, having students read the words after her. The song, the words and the meaning are not translated or explained.

While one or two boys are rambunctious, overall there is a positive atmosphere in the class. Most of the students are attentive, engaged and eager to participate. Before they leave for the day, the teacher brings out a box of donut holes and gives each student two as a treat.

Analysis

The marked difference between the overall score assigned to this learning activity, 2.15, and the average overall score 2.89 of all observations makes this an instance of limited implementation. By breaking down the overall score into its component parts and by examining the scores assigned to each design principle, one can better appreciate how this activity came to be an instance of limited implementation.

Figure 5: Design Principle Implementation in Limited Implementation Vignette



Design Principle 1: This design principle aims to base learning within meaningful and caring relationships. Here, students were not given the opportunity to work together or interact. At times they were penalized for initiating these types of interactions. Even as the teacher distributed a reward to the students there was no time allotted – structured or unstructured - for students to interact with each other. Similarly, there was little evidence of the teacher modeling caring relationships by inquiring about the wellbeing of other students, or by seeking to connect the students to the synagogue or the community writ large.

Design Principle 2: The components of this design principle assess the bridge between the content taught and the learners' lived experience. Here, the learners practiced Hebrew decoding; there was no room for students to explore these skills on their own or to help choose a direction for the learning. The words used as examples were not relevant to the students' regular Hebrew use and the lesson did not make a connection between the decoding and the students' experience.

Design Principle 3: The components of this design principle assess if the learning enables meaning-making through inquiry and discovery. While the lesson did allow students to develop skills, including decoding, prayer and Hebrew phrases, the lesson did not afford students an opportunity to make meaning of these experiences. For example, while students recited prayers in Hebrew and used the written word for Hebrew exercises – to find *otiyot sofiyot*, etc. – the prayers themselves were not explained and students did not have an opportunity to reflect on their meanings. Similarly, the song sung at the end of the class was connected to *Yom Haatzamut*, but the words were not explained and students were not able to make this connection on their own.

Design Principle 4: This design principle is concerned with the richness of the content in the activity. Here, the use of prayers like *Barchu* in the activity facilitated some meaningful content. However, the remainder of the activity was abstract. Without any translation or explanation, the richness of the content was diluted.

An Example of Moderate Implementation (Traditional Program with Design Principle Infusion)

This Conservative congregation in a suburb of New York City offers children in all grades a traditional two-day-a-week model. The kindergarten program runs only a one-day-a-week model. Parents have a choice regarding which day their children attend (either Sunday/Tuesday or Monday/Wednesday). There are however only traditional school classrooms models for the children. The LOMED model in this institution is a family one and was only initiated last year. Parents participate in learning at the same time and on a similar topic as their children; a parallel model of learning, but in a completely separate location. All parents of a particular grade are welcome to join these learning activities that take place in one of the families' homes after they have dropped their children off at Hebrew school. The classroom teachers for the children have participated in LOMED funded professional development.

This particular observation focuses on the kindergarten children's model *Seder*, an activity that reviews those traditions that are more common to everyone celebrating.

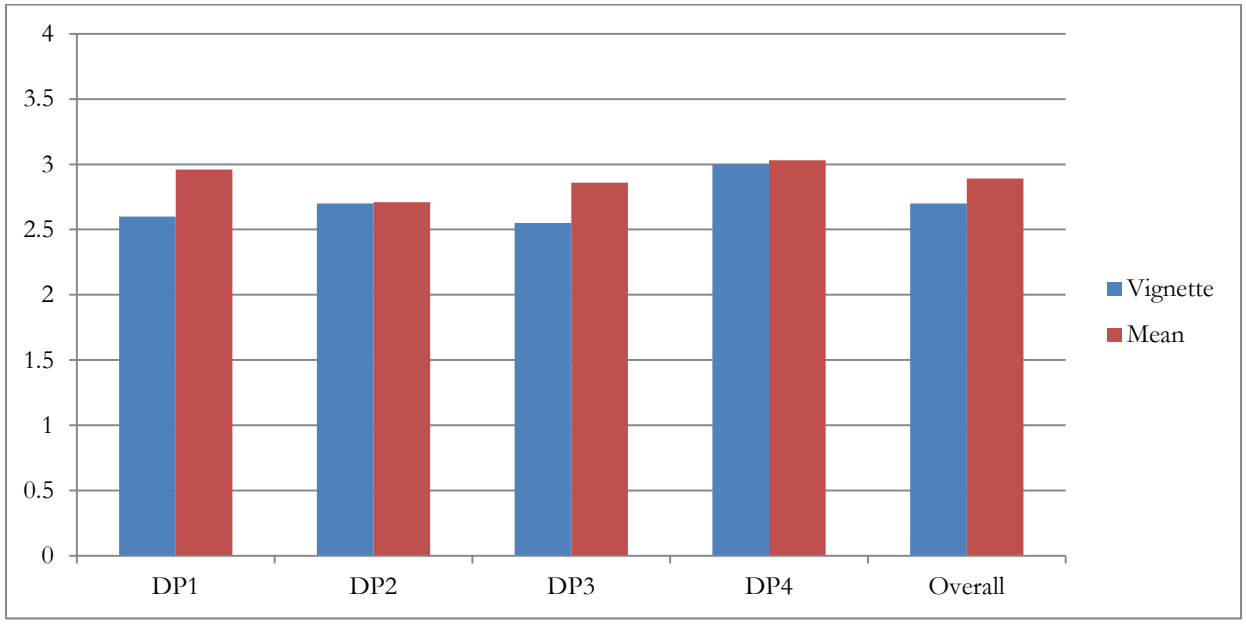
In this kindergarten activity, the learning facilitator leads the learners in a model *Seder* a few days prior to the start of the Passover holiday. The activity is ripe with opportunity to review what the children have learned about Pesach and the educator uses this to her advantage. The educator asks the children a lot of questions related to the story of Passover, the children answer as many as they can. In addition to the content reviewed, the educator attempts to make connections for the students by including real life examples of some of the topics that arise throughout the *Seder*. This aids the children in relating more personally to these topics. Topics include hard work and happiness and what these mean in the life of a five or six year old.

An assistant *(madricha*) is also present. She has a shy demeanor and struggles to take initiative with the children. The educator tries to encourage her and includes her a few times throughout the activity. For example, the *madricha* hides the *afikoman* and guides the children in jointly finding it. She sings along for some songs and prepares projects for the children to take home. Parents begin pick up before the *Seder* is completely finished. The *madricha* helps them get organized and collect their projects. They do not participate in the *Seder*. The teacher wishes each family a happy holiday and double checks that each child takes home every project they created related to the holiday to enhance their festivities. The teacher finishes the *Seder* with songs and begins clean up while waiting for the last of the parents to arrive.

Analysis

This activity's overall score of 2.8 is in line with the overall average score for all observations of 2.89. This score reflects the fact that there was evidence in this activity of an effort to introduce some of the design principles into what remains a highly traditional education form. Thus, there were some opportunities for the children to work together and, to some degree, the activity was related to the children's lives. While children struggled with answers to some content related questions, the teacher led all of the exploration of new topics. An examination of each design principle reveals the nuances in the implementation of the design principles.

Figure 6: Design Principle Implementation in Moderate Implementation Vignette (a)



Design Principle 1: The educator encourages the *madricha* to interact with learners with varied success, encouraging relationship building with a near-peer. As well, a limited number of activities involve the students working together; however, these same relationships are not fully realized or utilized consistently throughout the activity.

Design Principle 2: In this example the young age of the learners made it difficult to engage them in determining the direction of learning and making a link to their lived experience. However, the educator created a model Passover *Seder* to offer students a point of reference when they sit down to a Passover *Seder* with their families in just a few days' time. Throughout the activity the educator informally assessed the children by asking questions that reviewed what they have learned.

Design Principle 3: Igniting meaning-making in young children is a difficult task. Experience has led this educator to provide the students with many real life examples in an attempt to offer them a connection to

and understanding of the content they are learning. They discussed what is difficult for them, sang songs, used props, and moved at different tempos through the model *Seder*. These activities, however, were not consistently sustained resulting in an assessment of moderate design principle implementation.

Design Principle 4: The content of the *Seder* was rich. The entire story of Passover was reviewed in line with what would be expected for learners of this age. Children used their class-made *haggadot* to guide their learning. The educator incorporated outside resources as needed for this activity.

An Example of Moderate Implementation (LOMED funded)

This Manhattan-area congregation supplements a one-day a week religious school program with special family programs on Shabbat and holidays. On the holiday of Shavuot, the special programming was expanded to include the entire congregation not just the families of religious school students. The evening was branded as an intergenerational event for the entire synagogue. There were two halves to the event: an activity and a meal.

As is typical for this congregation the congregants were not punctual. After a delayed start the evening began with a game of Jewish Apples to Apples. Apple to Apples is a well-known team-game that involves creatively matching adjectives and nouns from different topics while a clock ticks down.

So as to create an intergenerational dynamic, the organizers tried hard to ensure that teams were mixed by age. Unfortunately, the older congregants did not arrive at the start of the evening, but came closer to the time that the food was due to be served. Nonetheless, the organizers made a special effort to include varied ages on each team by mixing younger children, older children, and parents. The Educational Director, along with two of the teachers from the religious school, functioned as a judging panel required by the game. "Jewish" Apples to Apples diverges from the more typical version of the game in that it contains many Jewish nouns including, for example, Torah Shabbat, *simcha*, or well-known Jewish personalities, such as Moses or Barbara Streisand.

At the start of the game, the adults on the teams assisted the children. But as the children, aged 7-14, became more familiar with the rules of the game they became more vocal. After a couple of rounds the children requested permission to explain their choices thereby illuminating and clarifying their selections. The judges granted their request. The rounds became more engaging with groups of children coherently describing their relationships to and the meaning of these different Jewish holidays and ideas. The adults continued to assist the younger children throughout the game ensuring that they were included in the activity. The game ended

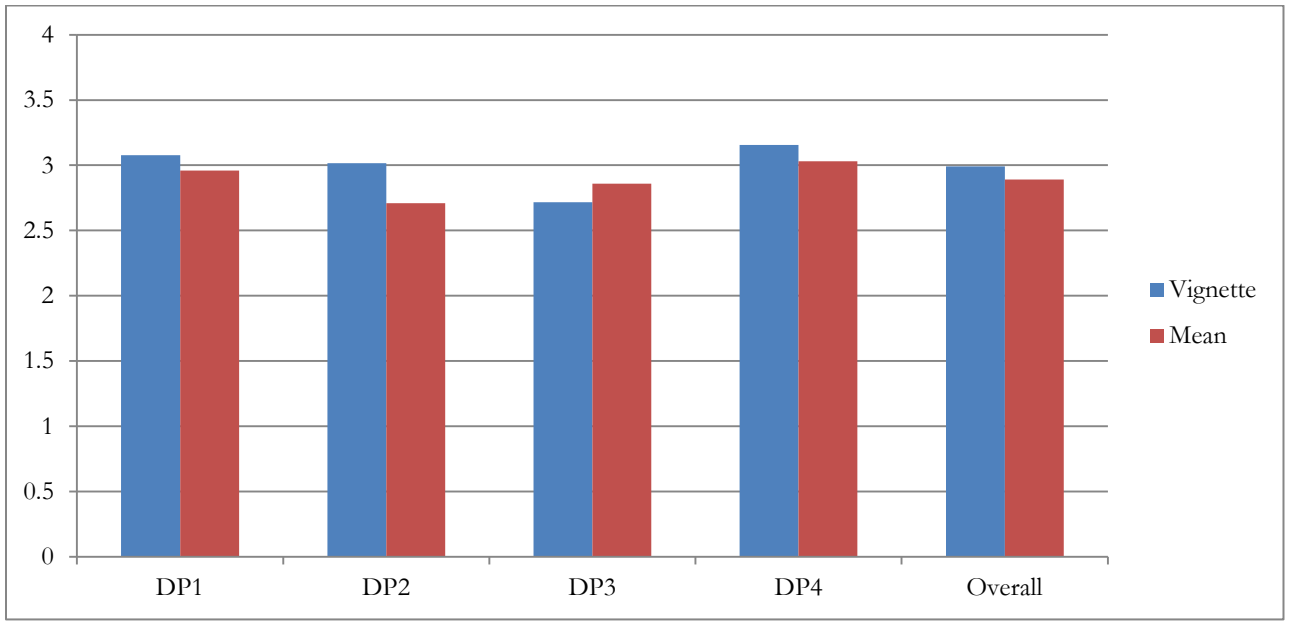
when it was time to enjoy the blintz and ice cream sundae bar. Although there was a winning team no one seemed to care all that much about who had won.
As older adults whose children no longer attended the religious school trickled in, they sat down and were assigned to existing teams. However, only one or two made an effort to go and sit with their team-mates. If they were interested, they assisted from wherever they sat across the room, limiting the intergenerational interactions desired by the program organizers.

At a predetermined time, the game ended and the entire congregation moved to the dining area of the synagogue. Here, together, the community made *Kiddush* and *Hamotzi*. Then each family found seats to sit around the tables that had been set up. Some friends sat together; usually they were of the same age. There were no meal time activities planned. Those who chose were able to socialize with each other. The congregants did not come together again as a group until it was time to make the blessing after the meal.

Analysis

This activity's overall score of 2.99 is roughly in line with the average score for all observations of 2.89, but is higher than in the previous example. This score reflects the intent to incorporate many facets of the design principles, and successfully doing so much of the time but not consistently. The intergenerational activity focused on building community. The game offered an engaging means to have the participants think about and express their relationship to Judaism. They did this as a group which elicited co-construction of meaning. The implementation of the activity did not always take advantage of every opportunity to build on and incorporate the design principles resulting in a few missed opportunities.

Figure 7: Design Principle Implementation in Moderate Implementation Vignette (b)



Design Principle 1: This activity was designed with intergenerational interactions at its core. Though many of the anticipated participants did not arrive or join in a timely fashion, those who did were involved, engaged, and interacted with the rest of their group. Interactions between people were maintained through the meal. However, those interactions were more self-selected and did not maintain the intergenerational groupings envisioned by the Educational Director.

Design Principle 2: The game was selected by the coordinators of the event to help ensure that participants' conversations reflected Jewish thought and practice. Once leaners began explaining their choices, opportunities for both reflection and determining the direction of the learning became prominent features of the activity. These reflective pieces required critical thinking but were not necessarily applicable to everyday life.

Design Principle 3: The game involved creating a connection between a groups' noun and the selected adjective. The teams had to work together to generate these explanations, calling thereby for the co-construction of meaning. At times the facilitators asked guiding questions that helped shape more coherent arguments from the learners. The physical space used for the activity did not easily facilitate group work, as evidenced by the way the late arrivals did not need to join their teams.

Design Principle 4: Through this design principle we can see the success of the program in connecting participants to Jewish content. The game itself had Jewish content built in and was aligned with the

congregation's values. The responses from participants reflected their ability to engage comfortably with the topics whatever their age.

An Example of High Implementation

In addition to regular classes, and a weekly Sunday morning family *tefilah*, this congregation runs an optional monthly *Kabbalat Shabbat* and dinner for Hebrew School children and their families that receives LOMED funding. As families enter the building, the Education Director stands at the door welcoming them and ushering them into the service, which was led by the rabbi and cantor and specifically designed for the congregational school families. The service includes singing, dancing, teaching songs, explaining *tefilot* and telling stories. Near the end of the service, the rabbi tells a personal story from his own childhood, teaching about a personal hero and his relationship to Israel. Children lean in to hear the story and answer questions when asked. Likewise, parents are attentive, listening to the rabbi and encouraging their children's participation.

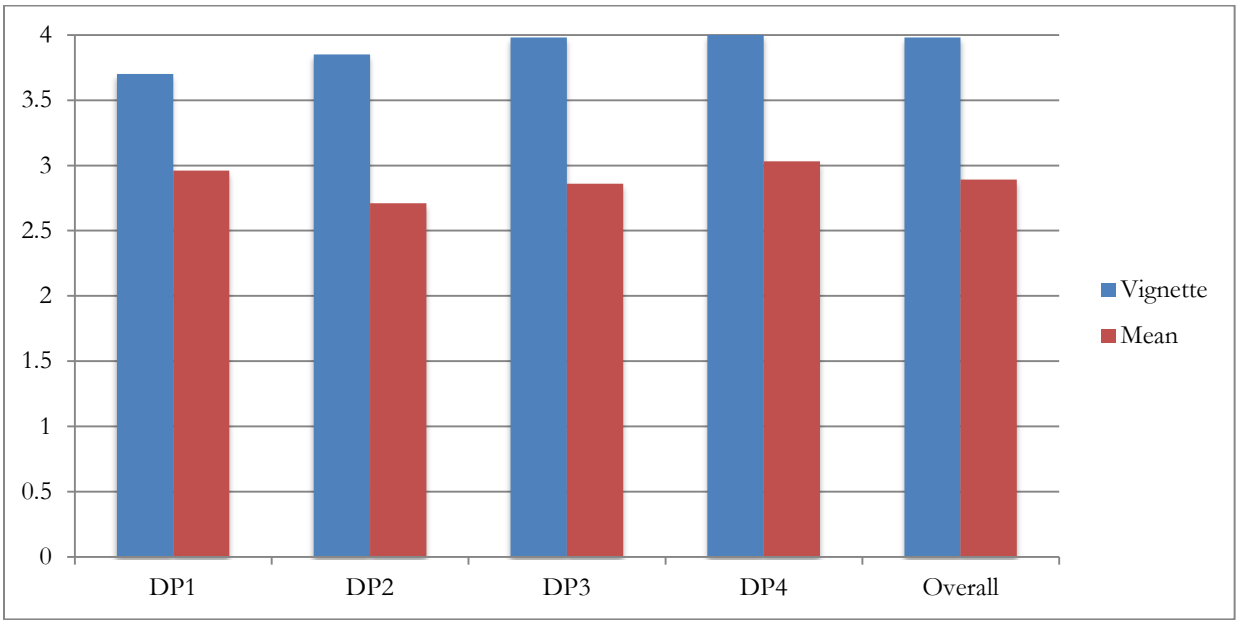
After *tefilah,* the whole group moves upstairs for dinner. Tables have been set up such that parents can sit at one end and children at the other end, with families grouped in social units. Many adults have brought their own wine. The rabbi, cantor, and rabbinic intern and their families are all present. The Education Director frames Shabbat rituals including *Shalom Aleichem, Kiddush* and *Hamotzi* with explanations. He explains the origins of the prayers and shares tidbits of his own practice.

Following dinner and a few songs, the children go downstairs and parents remain in the social hall. Downstairs the kids play games with a group of synagogue teens who, during regular Sunday morning classes, teach the children in small groups. These existing relationships are further developed through the social engagement. Parents remain upstairs and engage in a learning session with the Education Director about the *parasha*. As the evening wraps up, parents of the younger children say goodbye to one another and say that they are looking forward to their next meeting while the teens start their own *Oneg Shabbat* with games and hanging out. Following the planned *Oneg* in the shul, the teens organize their own get together in someone's home.

Analysis

The marked difference between the overall score of this learning activity, 3.93, and the average overall score, 2.89, of all observations make this an instance of high implementation. The exceptionally high score reflects the activity's emphasis on social relationships. Here, as well, understanding and implementation of Jewish rituals in a "real time" program come together to support whole person learning through the lens of the design principles.

Figure 8: Design Principle Implementation in High Implementation Vignette (First Example)



Design Principle 1: The activity is designed with social interaction in mind. It builds on previous social units and encourages participants to form social groups of their own. The emphasis on relationships comes at multiple levels – amongst learners, with near peers, with parents, with the clergy, etc.

Design Principle 2: Explanations of Shabbat songs, ritual and prayers were all included throughout the activity. These explanations offered the learners an opportunity to explore their own relationship to each of the aspects included in the activity.

Design Principle 3: The above mentioned explanations, coupled with an opportunity for participants to take part in a discussion that explored these topics as well the *parasha*, made possible the co-construction of meaning.

Design Principle 4: Incorporating so many Jewish sources including Shabbat prayers, ritual, the *parasha*, etc. make this a content rich and accessible activity.

A Second Example of High Implementation

A small congregation in Manhattan utilizes a two-day-a-week structure. Classes are combined K-1, 2-3, 4-5 due to the low enrollment, an indicator of the relatively few families with young children in the congregation. Older students meet on Tuesdays and Shabbat while the younger ones meet on Wednesdays and Shabbat. In addition to the Education Director who also teaches in the program, there are two learning facilitators. They have all completed LOMED training, including but not limited to working with their consultant and webinars.

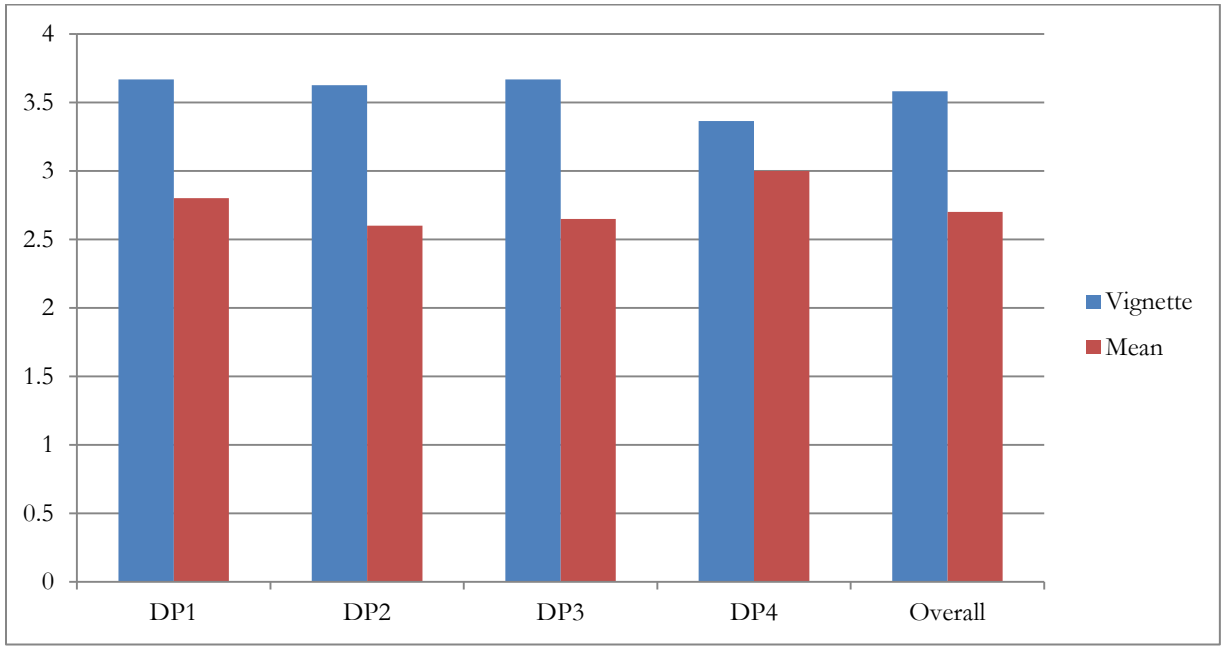
This weekday activity is a joint activity with first- to third-grades. The children begin their time together in the sanctuary. The room is spacious with windows that wrap around the top quarter of the walls above the *bima*, allowing congregants to see the trees, tops of buildings, and sky outside. The lesson begins with a reading of writings from the *siddur* (such as *Lecha Dodi*) and a poem by Chaim Nachman Bialik, whose meanings and metaphors they discuss. The two learning facilitators, a middle-aged retired day school teacher and a young graduate student, work as a team to guide the children in creating their own poetic metaphors for Shabbat as the activity continues. The learning facilitators draw on the children's knowledge of poetry from school, asking them to identify the different techniques found in poetry. Before the children begin writing, one of the learning facilitators suggests that they look around the room for inspiration, from nature through the windows, or in the artistry surrounding them. Only once they have taken a moment to prepare mentally does she suggest sharing a one-sentence metaphor aloud. The children are then asked to work in partners and together come up with three sentences for their poem. They are welcome to include each of the individual sentences they had already generated, creating a more attainable team goal that will allow for discussion and meaningful writing in pairs. They are also given the opportunity to draw a picture with their poem, offering children the opportunity to express themselves through different modalities. At the end of the session, the poems are read aloud without the authors' names; children could claim authorship if they so choose, and many do. The atmosphere is supportive without being forceful. For the second half of the day, children split into their Hebrew tracks. The entire session concludes with the cantor joining in for music in which she sings *Lecha Dodi*— a song they have just reviewed in their first session, to the tune used by the congregation every Shabbat.

Analysis

This activity's overall score of 3.6 is markedly higher than the overall average score for all observations of 2.89. This score reflects the fact that all four design principles were implemented to a high degree: relationships amongst students and with the congregation at large were stressed; through the use of poetry,

learning was made relevant to the learners' lives; learners were given ample opportunity, through multiple media, to construct their own meaning of Shabbat; and by integrating both classical and contemporary Jewish texts, as well as the liturgy of *Kabbalat Shabbat*, the activity was content rich. Delving into the particulars of each design principle offers a greater understanding of how this vignette demonstrates high levels of implementation.

Figure 9: Design Principle Implementation in High Implementation Vignette (Second Example)



Design Principle 1: Caring relationships are built on multiple levels. Amongst learners, the cross-age nature of the activity emphasizes a form of relationship-building not often seen in grade-level classes. Similarly, the group work, affords learners opportunities to build more intimate relationships. Reading the poems aloud, and allowing learners to choose if they would attribute their names to their work, demonstrates the heightened attention to meaningful relationship-building. Locating the activity within the sanctuary and engaging the Cantor to lead part of the program serve to build relationships with the congregation. Using the choral tune regularly used in the congregation further builds the connection to regular Shabbat services.

Design Principle 2: Connecting students who do not have a regular Shabbat practice to Shabbat can be difficult. While learners did not have the opportunity to construct the form or content of learning in this activity, they did connect the learning to their lived experience through the link made with their schools' poetry studies. Similarly, the moment of mental preparation before creating their metaphors allowed students

meaningfully to connect the activity to the broader scope of their lives, rather than jumping in to their work with limited reflection.

Design Principle 3: The high score for design principle 3 is a consequence of the learning facilitator utilizing multiple means to solicit personal meaning-making. First, learners were asked to write metaphors for Shabbat, next they worked in groups to write poems, and finally they were given the opportunity to draw a picture. The use of multiple modalities of meaning-making enabled the broadest spectrum of learners to construct their own relationships with and understanding of the text.

Design Principle 4: Of the four design principles, design principle 4 was ranked lowest for this learning activity, although it was still much higher than the norm. Although learners studied the words of *Lecha Dodi* and a poem by Chaim Nachman Bialik, and also sang the congregation's tune for *Lecha Dodi* with the cantor, these content rich elements of the learning activity were uncoupled, separated from the meaning-making activities (poetry writing, drawing, etc.) in which the participants engaged.

These four vignettes and their analysis demonstrate the utility of using both a qualitative and quantitative approach to data collection. Quantitative data provide a guide to the degree of implementation; the qualitative data add texture to make sense of the quantitative scores. Most usefully, the vignettes convey the palpable difference between those activities where the design principles were implemented in only a limited fashion and those with higher levels of implementation.

AN EXPLANATORY FRAMEWORK FOR DIFFERENCES IN DESIGN PRINCIPLE IMPLEMENTATION

Having seen how great can be the differences between the implementation of design principles, we now offer an account of why such differences occur and why they seem to occur with such consistency.

Three Forces that Shape Implementation

There are three forces that seem to enable or impede the implementation of the principles of whole person learning. As will be seen, these forces – contextual factors, intensifiers, and models – operate at three different orders of scale and with different degrees of flexibility.

i. Contextual factors: These forces cannot be changed without a complete overhaul of the congregational culture. The research has shown that a congregation's denomination seems to orient learning facilitators to implementing some design principles rather than others. These differences in orientation seem to derive from forces that are deeply embedded in the congregation's culture, and that – as in the case of denomination – hardly ever change.

A congregation's location exercises a similar fixed but almost unnoticed influence on the implementation of the design principles. Congregations closer to the city have more choice about which learning facilitators to employ. Committed to a progressive educational vision, the congregation's leadership can be highly selective about who is recruited to the team. Congregations further away from the city have less choice in selecting educators, and therefore may employ educators who may not be fully committed to alternative models. (It should be noted that some congregations have circumvented this contextual factor by paying for a car service or some other alternative to make a more distant congregation more accessible to those living in the city.)

There are further contextual factors that might influence the degree to which certain design principles are implemented. For example, in a congregation with a strong culture of intergenerational and interpersonal connection, there is likely to be greater receptiveness to the implementation of design principle 1, developing caring relationships. In a congregation characterized by ferment around ideological and theological issues, there might be greater readiness to implement design principle 3, concerned with inquiry and the construction of meaning. As the current study focused on the learning activity as the unit of analysis, it is not possible to make assertions about these elements of the congregation's culture.

All of these forces (denomination, location and the interpersonal norms of the congregation) impact congregational learning. They are deeply embedded in the culture, philosophy, and identity of the congregation making them more difficult to change than the set of intensifiers to which we now turn.

ii. Intensifiers. Less fixed than the contextual factors, there are other broad forces that shape the implementation of the design principles. These forces might themselves be influenced by contextual factors within the congregation, and might also call for significant ongoing effort and dedication on the part of the congregation's staff, but they are more malleable than contextual factors. These intensifiers include whether or not there is a full-time Education Director in the congregation, whether the congregation's learning facilitators are employed full-time, and the extent of the professional development to which a congregation commits.

These forces are called intensifiers because they have potential not only to influence discrete or single activities, but to inform the implementation of the design principles across the congregation. For example, a sophisticated full-time Education Director can influence the quality of teaching and learning across a wide range of activities and experiences. Quality professional development, if provided for all members of a congregation's educational team and not just those involved in a special imitative such as LOMED, can also impact the educational experience of all children and families in the congregation.

These intensifying forces do not exist as fixed factors, insusceptible to change. Rather, with determination and commitment they can shift a congregation's educational orientation.

iii. Educational models: The types of learning activities described above including real-time learning, family activities and near-peer activities lay the groundwork for high levels of implementation of the design principles. These are the educational practices employed within different models. The design principles, it seems, are fully aligned with the assumptions of these educational practices. Other models where these practices are prominent likely operate in similar ways, creating a fertile environment in which the design principles can more readily be implemented.

Our data suggest that use of appropriate models may exert greater influence on the implementation of the design principles than any other tier of forces. The differences the research team found between models that employ these alternative activities and those that did not were greater in the sample observed than in any other set of comparisons that the research team conducted. This suggests – although this is a conclusion that needs further testing – that, contrary to initial expectations, the most readily altered forces – the models and practices that educators choose to employ - may also have the greatest influence on the implementation of the design principles.

This framework, with its three tiers of impact serves as an antidote to a widespread tendency that the research team encountered during our interviews with Education Directors. The Directors attributed levels of design principle implementation (whether high or low) to the qualities of the individual facilitator, or to what others called, the X-factor. The research team does not dispute that exceptional individuals can have exceptional impact for good, but reviewing data systematically collected from a sample that includes 79 units of analysis we are struck by the consistency with which certain patterns have emerged. These patterns point to structural

factors that play out across the system impacting design principle implementation. Implementation need not depend on occasional or idiosyncratic circumstances.[8]

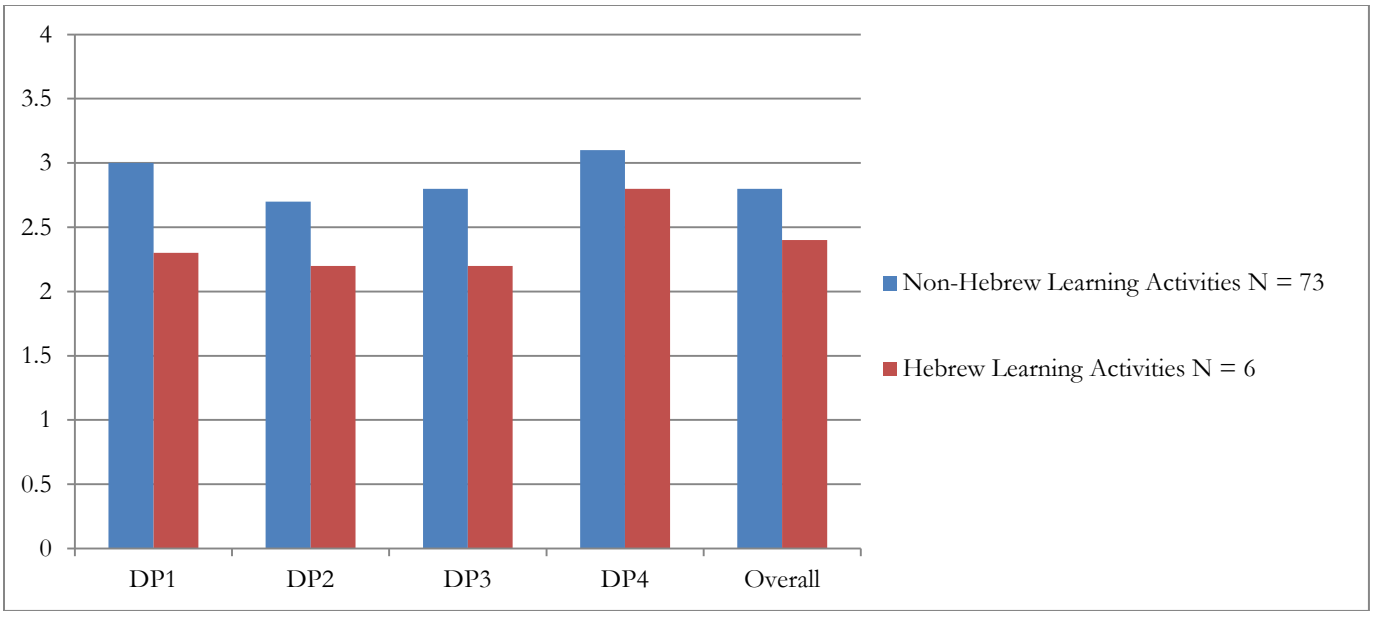
Extreme Instances of Design Principle Implementation and What They Reveal

Further appreciation of how these three forces shape the implementation of the principles for whole person learning can be gained through looking more closely at two special cases, one concerned with educational content, one concerned with the educational context. One case is an instance of where the research team observed consistently low levels of design principle implementation, and one is where the research team observed consistently high levels of implementation. These extreme instances pose important questions for the work of LOMED with congregations.

i. Challenging Content: Consistently Lower Levels of Implementation

It seems that it is more challenging to implement the design principles in skill-focused activities. A prime example of this challenge is in teaching to decode Hebrew, but, there is suggestive evidence that the same difficulties also occur when teaching prayer or any other regularized set of practices. Consistently, the research team found that the Hebrew activities observed scored lower on all of the design principles compared to the overall mean. (See Figure 10).

Figure 10: Levels of Implementation in Hebrew Activities



[8] Additional factors, as distinct from structures, that might also influence implementation include the services that LOMED provided such as training, handbooks, coaching, funding, and networking with colleagues. Examining the influence of these specific inputs was beyond the scope of the study.

Unfortunately, the research team was only able to observe six Hebrew focused activities. This sample is not large enough to run statistical analysis. However, the pattern of scores suggests that it is indeed more challenging to implement the design principles when engaged in this particular task. This may be because:

- The Hebrew taught is often not relevant to the lived experience of the learners. It is the Hebrew of prayer, or in some extreme cases (as seen previously in the "low implementation" vignette) Hebrew taught as the transliteration of English.
- Hebrew is often taught as individual work rather than group work, diminishing the possibilities of relationship building.

While these problems might be especially acute when teaching Hebrew, it is likely that they play out during the teaching of any set of particular Jewish skills where educators rely on routine and repetition to inculcate skills and behaviors.

ii. A Supportive Context: Consistently Higher Levels of Implementation

The research team was struck by one observation site that stood out in its commitment to the implementation of the design principles. At this particular congregation the design principles seemed to be woven into the fabric of all activities. As the Education Director describes it, they "eat, sleep, and breathe KDBB [Knowing, Doing, Believing, Belonging]."[9] This commitment is reinforced by staffing decisions: staff and faculty who are not on board with the goals of the program are not invited back the following year.

In this congregation, the research team found few traditionally designed activities. Even those activities that were not LOMED-related took into account the social relationships in the room, the ability of the students to find meaning for their lives; they allowed learners to explore, and were full of rich content. Also, in comparison to all other programs, this congregation consistently scored higher on all of the design principles.

Any conclusions drawn about this case must be tentative since just nine observations were observed at this site compared with 50 observations at other LOMED congregations. However, the example provided by this congregation highlights some of the different facets of the analytical framework presented above. In this instance, a number of intensifiers are at work: there is a full-time Education Director and an administrative

[9] KDBB - Knowing, Doing, Believing, Belonging - is an acronym and is a foundational tenet of the LOMED initiative. In this instance, the education director is referring to the congregation's approach to lesson and unit planning. The facilitators in the program are expected to incorporate at least one of the design principles into each lesson and all of them over the course of a unit.

assistant; a weekly professional development meeting drives the congregation towards the goal of design principle implementation; and the congregation targets the recruitment of JTS education students as educators and pays for their transportation to the suburbs. These factors suggest a path towards extending the implementation of the design principles across all of a congregation's learning activities.

CONCLUSIONS & IMPLICATIONS

Conclusions

Our 79 observations found that the four design principles of 21st Century whole person learning are being implemented to widely varying degrees in the 12 congregations we observed, ranging from limited to high levels of implementation. Furthermore, the implementation of different design principles is fully possible alongside one another. For example, despite what might seem to be their incommensurable quality, design principle 1 (relationships) can be successfully implemented alongside design principle 4 (content). Our observations point to a definitive conclusion: ***the four design principles of 21st century whole person learning are being more fully implemented within alternative models for congregation-based Jewish education than in traditional models for congregation-based Jewish education.*** Despite sampling constraints, consistent patterns of differences were seen between alternative and traditional models of Jewish education. The consistency observed by the research team suggests that these outcomes were not simply happenstance, the product, for example, of exceptional educators who happened to be identified for us to observe.

As the research team has repeatedly cautioned, we do not see these outcomes as having been inevitable or in some way self-fulfilling. Undoubtedly, the LOMED activities that the research team observed were designed with the design principles in mind; they are the fruits of carefully conceived educational decisions and ideas. However, the fact that the design of certain activities was guided by particular educational principles does not mean that implementation of the design principles in those activities was in some way inevitable. It is well known that once educators go about their work, their practices can fall short of their plans, even with the best of their intentions. Such hazards do not seem to have subverted the implementation of the design principles in settings where LOMED efforts have been concentrated.

The number of observations the research team conducted enable us to look beyond the random impact of exceptional educators on implementation. Instead, by using a careful research methodology, the research team has been able to explore the systemic factors that enable and impede the implementation of principles

of whole person learning. The research team has identified three sets of forces that, in our estimation, have shaped the implementation of the design principles: these forces – contextual factors, intensifiers and the educational models themselves – vary in flexibility and malleability, and may also vary in their impact.

The research team has delineated examples of each of these forces and has indicated how they influence the implementation of the design principles. The research team has been much more cautious, however, in suggesting which of these forces might have greatest influence on the implementation of the design principles. Our data suggest, in a preliminary way, that more than anything else it is the educational models themselves that are most influential in enabling the implementation of the principles; they provide the settings in which the principles can function. This is a claim that, the research team suggests, should be tested further.

Implications

Change - One Activity at a Time

An ultimate question suggested by our work concerns how to extend implementation of the design principles to a greater number of educational models and activities in the congregations; or to put it differently, how to extend the process of educational change started by LOMED. The research team is provoked by the tentative answer to this question suggested by our data. It seems that when educational approaches are carefully grounded in clear and well-conceived educational models they can bring about different, alternative, ways of doing things. This seems to be why alternative models are correlated with higher levels of implementation of the design principles. The findings suggest that in contrast to approaches that focus only on professional development for teachers or attempts to transform the entire congregation, it may be possible to achieve substantial educational change through a middle path focused on new models.

Of course, this conclusion – focused on the characteristics of the educational activities themselves – may be a product of our research design. In our study, the activity (or the model) was our unit of analysis, not the congregation. The broader role played by the congregation is moot at this point, and again should be further examined.

Supporting Change through Use of the Protocol

One promising means for supporting the process of educational change, and for scaling up the kinds of educational practices that LOMED seeks to nurture, might be provided by the very protocol developed as part of this study for the purposes of evaluation. Thanks to the extensive feedback provided by educators and

by consultants during the different phases of our study, the observation protocol depicts in great detail a picture of our how the design principles come to be operationalized. Because the protocol offers such a precise detailing of the components of good practice, it can be more than a tool for evaluation; it can also be a tool for teaching and design. When, for example, practitioners think about an activity that they are planning, they can use the protocol to guide their thinking and to focus their attentions. When Education Directors work with learning facilitators to develop their practice, they can use the protocol to structure the content of their conversations and to stimulate the self-examination of educational practice. The protocol can be more than a medium for assessment and evaluation.

FURTHER RESEARCH

Our work is grounded in an assumption that the design principles result in a different quality of learning. This assumption (as was shown through the literature review conducted in the first phase of this work) is grounded in social-constructivist theories of learning that place the learner at the center of inquiry, and that emphasize relationships, real-world experiences and life-relevant tasks. In this phase of the study, the research team did not study the learning produced, but rather the implementation of the design principles that were intended to enable such learning. The research team recognizes that the Jewish Education Project/ECE Leadership team is pursuing a different evaluation strategy to look at the learning outcomes in tandem with our study of implementation. We recommend that, ultimately, any examination of learning outcomes should be connected with an investigation of the forces that produced those outcomes.

As the research team indicated on a number of occasions, there seem to be intriguing differences between the degree of implementation of different design principles; some are more fully implemented than others. In one instance, these differences seem to be correlated with the cultural norms of the congregations. In other instances, these differences are less readily explained. The research team recommends further examination of such differences and of why some design principles lend themselves more fully to implementation than do others.

Finally, as has been repeatedly indicated, the unit of analysis in this study was the individual learning activity. For this reason it has not been possible to determine the overall success of particular congregations in implementing the design principles. As shown through the earlier example of the congregation that displayed consistently high levels of design principle implementation, it seems that in some contexts there may be a trickle-down effect from the congregation's leadership to the implementation of the design principles across multiple activities in the same setting.

At other sites there was evidence of a kind of spillover effect from LOMED programs to non-LOMED programs, with a small number of these non-LOMED programs implementing some of the design principles. In these instances, the staff associated with LOMED activities often overlapped and interacted with non-LOMED staff or they participated in the same LOMED-related staff development.

While these phenomena were not directly examined as part of this study, their existence suggests that it is worth exploring more fully how under what special circumstances the congregational context has an impact on design implementation even while it may be a less decisive factor in shaping design principle implementation than the specific educational model employed.

APPENDIX I: Congregations in the Study Sample

Congregation Name	Congregation Type	Denomination	Location
Beth El of Great Neck	Non-LOMED	Reform	North Shore of LI
Community Synagogue of Rye	LOMED	Reform	Rye
Congregation Emanu El NYC	LOMED	Reform	Upper East Side
CSAIR	LOMED CHADASH	Conservative	Riverdale
Pelham Jewish Center	LOMED CHADASH	Conservative	Pelham
Temple Beth Sholom of Roslyn	LOMED	Conservative	North Shore of LI
Temple Israel of Great Neck	LOMED	Conservative	North Shore of LI
Temple Israel of NYC	Non-LOMED	Reform	Upper East Side
Temple Shaaray Tefila (NYC)	LOMED	Reform	Upper East Side
Temple Sinai of Roslyn	LOMED	Reform	North Shore of LI
West End Synagogue	LOMED	Reconstructionist	Upper West Side
Westchester Jewish Center	Non-LOMED	Conservative	Westchester

APPENDIX II: LOMED Observation Protocol
Introduction

The following introductory comments frame how to employ the LOMED Protocol to observe whole person learning:

- This protocol is designed to observe a particular **learning experience, or series of learning experiences, not the entirety of congregational learning and culture.**

- To use this protocol effectively, multiple learning experiences should be observed. In addition to this tool, the observer may use other instruments, including interviews with educators and learners, a review of documentation or student work, to round out the observation of whole person learning.

- The observer should be someone familiar with the congregational learning program and with the principles of LOMED. The extent of the observer's pre-observation conversations will be determined, in part, by his/her existing knowledge of congregational learning, the principles of LOMED, and the specifics of the congregation. Although Jewish content and values are rarely mentioned explicitly in this protocol, it is an assumption of the work that this is the context.

- The observer can tick more than one box since the complexity of a learning experience may be accounted for in more than one way. Also, the observer should use narrative, so examples of what has been observed are clear.

DP 1: Learning will be anchored in caring and purposeful relationships		1	2	3	4	N/A
Component	**Description**	Not implemented	Implemented to some degree	Implemented according to the expectation described	Implemented to a high degree	Not possible to observe in this learning activity
A. Shifting roles	Educators and learners play both roles: as educators (who share their knowledge and experience) and learners (who gain insight and understanding from the experience of others).					
B. Sense of community among learners	**Social connections** The educator works to ensure that all learners are socially connected, no one is isolated and social groups are fluid. *For example, the educator may ensure that learners learn with different people over the course of the learning experiences.*					
	Caring community Learners have the opportunity to learn about and participate in caring relationships, and can demonstrate or express caring. *For example, the educator may structure rituals, learning or programs so that when someone is sick, or when there is something to celebrate, people, reactions and structures are in place to meet the emotion and needs of the moment. Similarly, a vocabulary of caring-explicit values may be apparent, in use by educators/ learner, in subject matter, or appearing throughout the space.*					
	Multifaceted building of community Community building is observed between the educator and learner, among learners, and across age-groups; within the parameters of learning activities and outside of them. **Learners' interaction with one another** In learning activities, learners interact with one another, and not just with the educator. *This may be seen in the differential ways learners are grouped, or through the kind of debriefing.*					
C. Social interaction of learners	Recreational activities build new *and/or* deepen the existing relationships through the social interaction of learners. There is intentionality in unstructured time.					
D. Positive affect	Educator sets a positive tone during learning. Learners appear to be enjoying their learning.					

E. Breaking down the silos of Jewish life	**Congregational learning** seeks to build bridges between learners and their families and others activities, programs and institutions <u>within</u> the congregation.	
	Congregational learning seeks to build bridges between learners and their families, and the **<u>Jewish community at large.</u>**	
	Congregational learning finds points of integration and collaboration with the **<u>community at large</u>** more broadly.	
F. Family engagement in learning experiences	The family unit is part of congregational learning. *This may mean that learning experiences are geared toward the whole family at once, or that families participate in parallel learning experiences for different ages or interest groups.*	
G. Extending learning to the home	Learning is extended into the home through any of a variety of strategies: *learner work, the use of technology, etc.*	
	Learners report bringing learning from educational experiences facilitated by the congregation to the home context. *This may happen through behaviors done at home and reported back to the educator, or reported at-home conversation about the content of learning.*	
H. Learners' involvement	Learners are consistently involved in educational experiences.	
I. Developing purposeful relationships	Learning experiences are designed so that relationships develop through learners working together toward shared goals	
J. Role models	Role models (peers, near-peers, elders, etc.) demonstrate relationships as essential of learning.	
K. Designing learning experiences	Learning plan integrates the design principle	

DP 2: learning will seek the answers to the questions, challenges and meaning of everyday life		1	2	3	4	N/A
Component	**Description**	Not implemented	Implemented to some degree	Implemented according to the expectation described	Implemented to a high degree	Not possible to observe in this learning activity
A. Content/topics studied are relevant to learners' lives	The content/topics studied in educational experiences are connected to the learner's lived experience. This requires some knowledge of the learners, their everyday lives, and their learning environment. *Educators access the questions and stories of learners to inform content (the moving from live to Torah, then from Torah to life)*					
B. Transfer of learning to everyday life	Learning is designed to be applied in daily life.					
	Educators use assessments to determine if learning has been applied/experimented with in daily life.					
C. Real-life or real-time experiences	Learning experiences are situated in a meaningful, life-relevant context. *For example: doing service learning is part of learning about tikun olam, or praying is part of learning about prayer.*					
D. Opportunities to reflect upon the learning experience	Through structured and unstructured learning experiences, (planned or spontaneous) learners reflect on their learning during and/or after the experiences. *Reflection may be observed by inquiry in a follow-up learning experience, by over-hearing student-talk, or through conversation with parents.*					
E. Making decisions about the direction of learning	In collaboration with educators, learners play a role in determining the subject areas or content to be explored.					
F. Learning in "real life" places	Learning takes place where "real life" takes place. Learning is not only in places that "step out" of life, but learning takes place where life takes place.					
G. Designing Learning Experiences	Learning plan integrates the design principle					

DP 3: learning will enable individuals to construct their own meaning through inquiry, problem solving, and discovery		1	2	3	4	N/A
Component	**Description**	Not implemented	Implemented to some degree	Implemented according to the expectation described	Implemented to a high degree	Not possible to observe in this learning activity
A. Role of educator as guide	Note: educator's role shifts from the 'sage on the stage' to the 'guide on the side'. This entails inquiry-based activities, as well as problem solving and discovery oriented.					
	Questions asked by educator The questions asked by the educator build skills of problem solving, discovery and/or inquiry. The questions asked reflect higher order cognitive activities (appropriate to learners' age)					
B. Meaning making through experience and reflection	The educator facilitates reflection on experiences that enable individuals to construct their own meaning. *This may happen synchronously or asynchronously.*					
	Interpersonal engagement and co-construction of meaning Educators stimulate ongoing conversation amongst learners and with the educator as a way to encourage co-construction of meaning					
C. Question-asking by learner	Learners ask questions that demonstrate their own work in meaning making. The questions asked reflect higher order cognitive activities such as analysis and evaluation. *This may happen by drawing on personal examples, or making explicit connections between different pieces of learning. (Note: questions are only one aspect of meaning making. Other forms may be cognitive, and therefore un-observable without using specifically designed assessment tools)*					
D. Transfer from learning to life	The learner is given the skills, practice and capacity to transfer his/her learning to the breadth of life. *This may be seen in the kind of practice activities learners engage in, or the way learning is framed by the educator.*					
E. Modalities	Modalities are diverse and engaging, making use of multiple senses and learning styles.					
F. Use of space	The use of space is intentionally considered as a tool for provoking and supporting learners in making their own meaning. *This happen within a traditional learning environment (i.e. a classroom) or by the use of non-normative spaces (e.g. outdoors, field trip, non-classroom congregational places)*					
G. Designing learning experiences	Learning plan integrates the design principle					

DP 4: learning will be content rich and accessible		1	2	3	4	N/A
Component	**Description**	Not implemented	Implemented to some degree	Implemented according to the expectation described	Implemented to a high degree	Not possible to observe in this learning activity
A. Jewish content	The content of learning is rooted in Jewish sources. (classical through contemporary)					
	Learning activities hold rich content and engage learners in creative ways.					
B. Content rich and accessible.	Content, whether from Jewish sources or not, is rich and accessible. It challenges the learner, and has the capacity to change them.					
C. Alignment of content	Content is aligned with the vision and culture of the congregation.					
D. Individualized learning	**Content variety** The content and process of learning experiences address different varieties of learners' knowledge and interest.					
	Learning product The products of learning are differentiated, so there is more than one way for learners to show their interest, or what they know.					
E. Extensions of learning	Further learning, beyond structured learning experiences, is encouraged and supported.					
F. Multiple layers	**Challenge** Learning involves materials and activities that are cognitively or emotionally challenging to the learners.					
G. Learning is developmentally appropriate	Learning activities, content, products and methodologies are appropriate to the developmental level, knowledge & skills of learners.					
H. Outside providers and resources	The congregation has engaged outside providers or internal specialists who support and empower local educators to enhance learning experiences, or add an element to the learning activity designed by congregational educators which the educator themselves could not provide.					
	Resources created outside of the congregation are integrated into learning experiences					
I. Designing learning experiences	Learning plan integrates the design principle					

APPENDIX III: LOMED Phase II Qualitative Observation Script

Date:	**Congregation:**
RC Observer:	**CSI co-observer:**
Type of learning:	**Age Level Observed:**
___'Traditional' ___'Alternative'	___Elemen. ___Middle ___High
Denomination:	**Cong size:**
___Reform ___Cons.___Other	___Large ___Med ___Small
Congregational Context: Briefly describe the learning systems in the congregation – what are the various programs offered to each age group?	
Learning facilitator: • **Who was the LF?** • **What is his/her training? Training in LOMED/21c learning?** • **What does s/he do when not at the congregation?**	
Learning activity • **Briefly describing the broader learning program for these students – the types of activities and the content covered throughout the year.** • **Briefly describe the learning activity you observed.**	
Content • **What was the content being covered?**	
Quality of learning • **What is you your sense of overall quality of the learning experience for students? Does it realize 21st century principles?**	

Scores:

RC	CSI
DP 1	
DP 2	
DP 3	
DP 4:	