

ד"ר מאיר אמיר ושות'

ייעוץ, תכנון, ניהול

וייעוץ כלכלי בע"מ

Dr. Meir Amir and Co.

**Economic planning, management
and consulting Ltd.**

Training *Madrichim* for Taglit – Birthright Israel A Comprehensive Economic and Financial Analysis

Miki Gur

Scott Aaron

Meir Amir

October 2011

TABLE OF CONTENT

Chapter 1 – Introduction and Context	3
Chapter 2 – Overview and Data	6
Chapter 3 – The short seminar for current <i>Madrichim</i>	12
Chapter 4 – Taglit Fellowship program	19
Chapter 5 – Summary and Conclusions, Proposed Plan Of Action and Expected Timetable	22
Appendix A – CIE Seminar program	24
Appendix B – Hillel Alef Program	25
Appendix C – Statistical Tables	26
Appendix D – Summary of retreats' proposal	27
Appendix E – List of Interviewees	28

Chapter I – Introduction and Context

In January, 2011, we completed a detailed study for Taglit of the tour guides that lead the North American Taglit groups on their Birthright trips in Israel. The Israeli tour guide, we asserted, is the pivotal figure who leads the 40-50 students on the bus during the 10 days of their tour; His/her personality, capabilities, knowledge and background determine the outcome, that is, the success of the entire trip.

What is considered to be a successful Taglit trip? First, participants need to have a satisfying physical, emotional, and intellectual experience. Second, the experience must meaningfully impact their Jewish identity and their relationship to Israel. Third, participants will hopefully form and maintain a broadly-defined mode of affiliation to the Jewish community upon their return. To achieve these goals, we concluded from our research, there is a need to invest in training and transforming the ordinary Israeli tour guide into a tour educator that can achieve the specified trip goals of Taglit.

Our previous work outlined a detailed feasibility study, a practical program to develop a unique tour educator course and supplementary in-service training which will dramatically change the persona of the Israeli tour guide into a Taglit tour educator. Overall, we concluded that the tour educator is the most important person on the bus so it is justified to invest substantial resources to select and train the best to become long-term committed Taglit tour educators. Our study and proposal were adopted by Taglit, and the plan is now being implemented in Israel at the Taglit Institute under the direction of Scott Copland. It is expected that within several years the graduates of the Institute will transform the Taglit experience, make it a more meaningful Jewish education experience that will have a long-term impact on the North American Jewish communities from which the participants come and return.

However, in our previous study we did not focus on the two North American counselors, the *Madrachim*, who accompany the group during the entirety of the trip. Those two, we thought, are simply chaperones whose main task is administrative and technical, "head counters" or trouble shooters if something goes wrong such as caring for an individual participant in need of personal attention and so forth. We did not attribute an educational role to their position. Six months later in July, 2011, we were engaged to perform a similar study addressing the question of the educational role of the North American *Madrachim*.

As this current study would focus on North American bus staff, it was decided we needed to add a North American team member who is well versed in North American institutional culture and a subject-matter expert in Jewish education for the target population of Taglit Birthright trips. Scott Aaron joined our team in this capacity in August and we began our work in our respective countries, collecting data, interviewing key people and reading relevant literature while keeping one another informed of our findings. In September, Meir Amir went on a study tour of Taglit partner agencies in the USA, starting with a two days visit to the CIE (Canadian Israeli Experience) *madrichim* seminar with Scott at a camp east of Montreal. The CIE seminar had been recommended by numerous sources as an excellent training program for *madrichim* to be studied, and it also provided a good chance to converse with Scott and exchange views and information about the work carried on up to that stage. Some basic memos were written and some insights were developed by Scott and Meir at the camp. Meir then had a week of meetings in Manhattan with representatives of trip organizers and related educational figures. This week included a day visit to Chicago to meet with Anne Lanski and her staff from ICenter, Shorashim representatives and Dr. Barry Chazan who also served as our main Taglit resource throughout this study. Simultaneously, Miki Gur conducted additional interviews and collected more data in Israel. (See Appendix E for a list of all interviewees.)

As the work progressed, we refined and rethought our perspective about the role of the *Madrichim* in the Taglit tour since our previous study. The Israeli tour educator is the leader of the group and holds the formal responsibility for it as stated in Taglit's standards. But, and this is the important point, however well trained he or she may be, the fact is that they are Israeli whose capability to reach out to the group is limited by the very fact of their "otherness". They are not really able to understand them, their inspirations and aspirations, their search for identity as a North American Jew with its attendant conflicts and complexities. They cannot have an intimate understanding of their participants nor serve as a role model for them beyond their trip because of the mere fact that once the trip is over, the participants return home to America while the guide stays in Israel.

It is at this limit of the guide's influence that the *Madrichim* enter the picture. They are in many respects similar to their participants: young North American Jews in their 20s, just at the early stages of their career before establishing their families and still uncertain about the future. If we can develop a new type of *Madrich*, a young Jewish

educator whose mind and vision about his Jewish identity within the American context are already mature, informed and well developed, an educator who is a trained leader and mentor, we may be able to bring about a drastic change in the North American Taglit experience and its post-trip impact. The intensive training concept to achieve this long-term goal is outlined in chapter 4.

In the meantime, there is a short-term need to improve the current *Madrachim* who are now recruited by the trip organizers but not trained and prepared to meet Taglit's staffing and educational expectations. Taglit's trip capacity is projected to reach 50,000 in the next few years and it will take time to implement an intensive training program, so we have devised an interim seminar to supplement the skills of current counselors and make them better assets on their trips. This interim training concept is discussed in details in chapter 3.

The two-tier system which we propose is an ambitious scheme which is directed to both the immediate needs of upgrading the current *Madrachim* and to the future goal of developing a new type of *Madrach*, a Taglit fellow, who will accompany the newly-upgraded *Madrach* and gradually become the normative candidate for trip staff. It is a common wisdom that organizations tend to react to the **immediate** issues, the burning problems of the very present, while neglecting the **important** issues which determine the future. In this case, we have chosen to propose the median way, addressing the current issues by upgrading the current cadre of *Madrachim* while preparing for the future by developing the concept of a Taglit educational fellow who will change the trip experience in the long run, a change that is synchronous with Taglit's *raison d'être*. However, and this is a critical component of the proposal, we believe it is important for both programs to be implemented simultaneously as the need for upgrading the trip staff impact is too great to wait several years for the development, implementation and completion of the long-term fellows program. The interim program will also allow for a gradual change in the institutional culture of trip providers and organizers to assimilate higher educational expectations and goals of the trip as normative rather than optional.

Chapter 2- Overview and data

As already outlined in chapter 1, the staff that accompanies the Taglit ten-day trip is possibly the most important educational factor for the success of the entire experience. The Trip Organizers have the overall responsibility for the selection, recruitment, training and supervision of all three bus staff members. Taglit's role lies in setting the standards for the providers regarding staff selection and monitoring, regulating and evaluating those processes. The 2011 Taglit Standards and Requirement manual (see page 24 G) states the following:

1. Every group of 40 participants must have 3 full time staff members that remain with the group for the entirety of the program. Staff must include at least one male and one female.
2. The senior member of the staff is the Tour Educator who is licensed as a Tour Guide by the Ministry of Tourism. This individual has the overall authority and responsibility for the group and must be an Israeli over the age of 24.
3. In addition to the Tour Educator, two full time Counselors, *Madrichim*, staff members, will be with the group for the entirety of the program.

The manual also states that the requirements for the *Madrichim* should be as follows:

- A. Be minimally 21 years of age.
- B. Have a proven prior Israel experience, preferably on an educational trip, and with staffing responsibility.
- C. Have participated in a training program, offered by the respective Trip Organizers, and in some cases by Taglit-Birthright Israel.
- D. Have proven experience in working with youth or young adults from abroad, or having held leadership positions in youth or campus organizations.
- E. Demonstrate core Jewish literacy, as evidenced by, for example, day-school graduation; Hebrew high school studies; Jewish studies at a university or the equivalent.
- F. The recruitment of new applicants for a trip does not by itself qualify a person to be accepted as a staff member on a Taglit-birthright Israel trip.

Taglit counselors - the current mode of operations

Based on the latest available data from the most recent annual Taglit trip cycle noted in table 1 below and in Appendix C, 1,222 Taglit counselors from North America accompanied the participants during those two sessions. Our estimate is that approximately 65% (800) counselors were first time staff members and approximately 35% (422) counselors were veterans that had staffed more than one Taglit trip in the past. More than 25,500 participants from North America shared the 2011 Taglit Birthright Israel experience in some 611 trips.

TAGLIT STATISTICS TRIP 23+24 -ANNUAL 2011								
Organizer					Participants	Percentage	Groups	Counselors
EGGED					84	0.33%	2	4
EZRA WORLD MOVEMENT					630	2.47%	15	30
HIBBA					420	1.65%	10	20
HILLEL					1,976	7.74%	47	94
ISRAEL EXPERIENCE JEWISH AGENCY					799	3.13%	19	38
ISRAEL EXPERTS					2,091	8.19%	50	100
ISRAEL FREE SPIRIT- NCSY ORTHODOX U					1,160	4.55%	28	56
KENES					126	0.49%	3	6
KESHER ISRAEL-URJ REFORM					1,260	4.94%	30	60
MAYANOT					3,274	12.83%	78	156
ROUTES TRAVEL					1,323	5.18%	32	64
SACHLAV					1,806	7.08%	43	86
SHORASHIM					2,023	7.93%	49	98
TLALIM OUTDOORS					5,083	19.92%	121	242
Yael ADVENTURES					966	3.79%	23	46
YOUNG JUDEA					830	3.25%	20	40
SUB-TOTAL USA					23,851	92.46%	570	1,140
CANADA ISRAEL EXPERIENCE					1,668	6.54%	41	82
TOTAL NORTH AMERICA					25,519	100.00%	611	1,222

370 trips took place in the summer and 241 trips took place in the winter. The trips were organized by seventeen independent trip organizers. Ten of these organizers are non-profit organizations with a larger educational mission beyond the trip experience and seven organizers are for-profit companies whose primary purpose is travel tourism. Non-profit organizers accounted for 55% of the total trip cycle population and for-profit organizers accounted for the remaining 45%.

For this study we interviewed representatives of eight organizers representing 72% of Taglit participants as noted in table 1 and Appendix C. Of these eight, five are non-profit organizers (CIE- Canada Israel Experience, Hillel, Israel Experience, Mayanot, and Kesher Israel) and three are for-profit organizers (Shorashim, Israel Experts, Tlalim). We regularly spoke to both North American and Israeli staff members from these organizers.

Our findings show that there is a general consensus among all interviewees regarding the need to better train the American counselors. The American counselors are distinguishable from the Canadians in this need because CIE, which runs almost all Canadian trips, has an extensive and long-standing *madrichim* training program that effectively meets the needs of their staff and national communal structure. This includes their annual four day training seminar (see Appendix A) plus an additional twenty four hours of training as minimal requirements for staffing a trip. This is differentiated from the reality that training programs for American trip counselors hardly exist. Taglit standards do not precisely define what is considered an adequate training period for trip counselors, but almost all organizers reported staff orientations of three hours or less which we conclude cannot be considered as serious training.

Organizers repeatedly noted that there is no budget subsidy from Taglit earmarked for training counselors so they cannot afford to provide real training for them. Therefore, there is a huge gap between the written requirements in the Taglit standards manual and the actual fulfillment of them by the organizers. There is a consensus among the organizers interviewed that the only reason for the current situation is the lack of budgets and they do not object to better training in theory. According to a number of the interviewees, better training programs did take place in the past but these activities were terminated because of the budgetary constraints resulting from the recent recession. The most prominent example of this situation is Hillel's move from a multi-day in-person staff training seminar to an on-line six-session presentation (see Appendix B). Concurrently, for-profit organizers reported fewer resources outside of the Taglit subsidy to draw upon for training funding while non-profit organizations reported being able to tap their larger education budget lines to some degree. Interestingly, despite the lack of training, in general the organizers are quite content with their counselors and their role in the trip. Interviews with Taglit's staff see it differently. According to Dr. Barry Chazan, Taglit's primary education consultant, the fact that Taglit's expectations are not thoroughly

defined and there is no adequate follow up hinders the educational impact of the trip upon the participants.

All the organizers report being satisfied with their veteran staff; quite a few counselors are taking their fourth and fifth Taglit trip. According to the organizers, there is a high demand to serve as a counselor and therefore the selection enables them to pick up the best counselors available. These are counselors that often already have a significant Jewish leadership experience, in particular in summer camps, and also often have significant previous Israel experience. Only the very successful counselors are invited for a second, third and fourth trip.

Our research shows a differentiation between two basic types of counselors. One type are counselors that are employed by Jewish community organizations, Hillel campus staff, Chabad Rabbis, assistant URJ camp directors, community activists and so on. The other type of counselor is younger with no affiliation with Jewish organization or involvement in Jewish education in their day to day life. Among the first time counselors many are motivated by the opportunity to win a free trip to Israel. Among the veteran counselors, however, there are quite a few people that are practicing different professions in their real life both within and outside of the Jewish community but want to continue leading Taglit trips to Israel.

Our impression is that all types of organizers play an important role for Taglit. The denominational organizers, for instance, tends to serve students who are already affiliated in some way with the various religious communities. Unaffiliated students, on the other hand, tend to be recruited by organizers who are not connected to a specific religious community. Common standards are ideally what keep the diverse trip organizers commonly within the Taglit mission regarding both organizers and counselors.

To exemplify the diversity among the organizers, below are the practices of three organizers that demonstrate different staffing solutions adopted by organizers.

Hillel- Hillel's share in Taglit 2011 was 7.7%. The organization recruited their counselors from among their own employees on campus. The fact that Hillel's counselors are active in Jewish and Israeli affairs during the entire year means that there is a huge difference between an average new Hillel counselor and a new counselor that was recruited by an organizer who only runs trips. Hillel's personnel

are immersed in Jewish community activities all year round. They also receive additional ongoing training relating to their campus work. As noted above, Hillel was able to allocate a special budget in the past for conducting a training seminar for Hillel's personnel going on a Taglit trip. However, in recent years this funding was no longer available and Hillel has developed an alternative online training seminar for their Taglit staff (see Appendix B). The online seminar is interactive and requires the participant to read and learn materials, to communicate online and demonstrate knowledge and skills relating to the trip and its goals. According to Hillel, development of each training hour took 20 hours of preparation.

Mayanot- Mayanot's share in Taglit 2011 was 12.8%. Mayanot is a non-profit association that works closely with the Chabad movement. Mayanot does not allocate efforts and money into training their American Taglit counselors. Quite often the senior counselor that accompanies the Mayanot Taglit trip is the Chabad Rabbi/*shaliach* on campus. Sometimes the two counselors that accompany the Taglit trip are the Chabad Rabbi and his wife. Mayanot has adopted its own approach to guiding the Taglit trip. They add a qualified fourth staff member to each Taglit trip. This staff member is a trained Israeli counselor that can deliver the Mayanot educational spirit. Often the fourth staff member is an experienced *madricha*, a female counselor from the *Bnei-Akiva* Orthodox youth movement. In principle, Mayanot wants to have an Israeli man and an Israeli woman on their buses. They prefer that the trip is led by a skilled Israeli, usually male, and that an Israeli woman will communicate with the young women on the trip. They do not put a lot of weight on training American counselors. They claim that the second staff member from abroad, who is selected on the merit of his recruitment achievement, cannot replace a skilled Israeli.

CIE- Canada Israel Experience's share in Taglit is 6.5%. CIE's approach to training the Taglit counselors is unique and differs from the other organizers as noted above. It must be stated that CIE is an integral part of the Jewish community in Canada. CIE is supported by the Canadian Jewish community in order to improve the educational standards and achieve the goals of the community. Accordingly, CIE runs an annual *madrichim* training and evaluation weekend (see Appendix A). It should be stressed that unlike every other model of training we examined, a successful completion of the CIE seminar does not entitle a Taglit trip to Israel as a counselor. In fact, after completing the seminar, potential *madrichim* need to go back to their Canadian

communities and serve these communities for an entire year. Only after a year of service can they join a CIE trip as a counselor. What we see here is a holistic approach to the role of a young Jewish leader in Canada. Joining a Taglit trip as a counselor is awarded only after active service within the community, and counselors are expected to continue with active commitment to their Canadian Jewish community after returning from the trip. The trip itself is just another milestone on their adult Jewish life journey.

Our research has shown a huge diversity between the various organizers and a pervasive lack of training of the counselors before the trip. The new model and vision that will be presented here, together with our previous work on Tour Educators which is now implemented in Israel, will deal with this problem and enhance the quality of the Taglit experience and the success in achieving Taglit's goals by recruiting the most suitable candidates for Taglit bus staff and providing them with the appropriate high quality training.

We are proposing a new model where each Taglit trip will be accompanied by three different types of staff members. The selection process for each type will better suit the role and expectations from each specific staff member. Appropriate training will be delivered to each type of staff member and three different types of certifications will be awarded to Taglit staff:

The Israeli Tour Educator -Recruited and trained in accordance with the new standards set by the Taglit Institute for Tour Educator training already in development.

Madrich Taglit- The regular North American Taglit counselor –recruited and trained as outlined in chapter 3.

The Taglit Fellow – North American senior counselor recruited and trained as outlined in chapter 4.

Taglit's education leaders will oversee the entire proposed training system. They will redefine roles and tasks of trip staff and ensure synchronization between the different activities as well as monitor, regulate and evaluate the new training programs.

Chapter 3 – the short seminar for current *Madrachim*

In this chapter we will outline the method, content and budget for our plan of training of current first-time counselors on the Taglit trip, the *Madrachim*. Our main recommendation regarding first time counselors is to train them in a preparatory long weekend seminar as outlined below and to enhance this seminar with a limited-scope online training. We think the seminar must be mandatory; no *Madrach* should board a bus before completing the seminar. Candidates will be selected by the organizers as it is done now, but Taglit will have their names and resume in advance of the seminar which is not currently done. This alone will dictate a more careful selection of counselors by the organizers.

Training and evaluation seminars - structure

The new counselor seminar model is outlined as follows:

1. Taglit will develop and run new Training and Evaluation Seminars for American first time counselors. The seminar will be a total of 72 hours, to be offered twice a year in three or four different locations as needed.
2. The seminars will be developed by a team of educational experts and conducted by experienced trainers and content providers.
3. Trip organizers will receive a dedicated amount of hours within the framework of the seminar. During these hours, the organizers will be able to orient their new counselors to their own trip process, agenda and values. Organizers can partner with other organizers and jointly conduct these dedicated training sessions if they deem it of value to do so.
4. Participation in these seminars will be mandatory for all first time counselors selected by an authorized trip organizer to staff a Taglit funded trip.
5. All Participants will receive a certification of “*Madrach* Taglit” at the successful completion of the seminar.
6. Counselors are contracted with their sponsoring trip organizer and the organizer is responsible for the counselors’ attendance and participation in the training seminar. However, counselors who may be found unfit to serve as *Madrachim* according to Taglit’s criteria during the seminar by the Taglit educational staff will be ineligible to serve as a trip counselor on a Taglit funded trip. In that case, the trip organizers will be asked to replace the missing position with a qualified person.
7. Seminars will be held and repeated twice per calendar year during the spring and autumn that precede the Taglit summer and winter trip seasons.

9. Seminars will be held in three or four different geographic locations in the USA in order to minimize travel costs with possibly two seminars offered along the east coast where more than 50% of the participants reside. Based on population data, one would be held on the West Coast and one either in the Midwest or South or both. (See Appendix C for population data.)

10. Retreat centers that allow indoor and outdoor activity will be selected in order to enable diverse training in experiential education. (See Appendix D for data on four possible seminar locations.)

11. Canadian first time counselors will continue to participate in the existing CIE training program and will be exempt from the Taglit seminar.

12. Each seminar will include up to 75 participants. We estimate that around 600 participants will be trained in the seminars each year based on current staff trends.

13. Participants will not receive any stipend for participating in the seminar.

Participants will receive full reimbursement of their travelling costs to and from the seminars.

14. Trip organizer staff will be reimbursed for travel to and from the seminars but will provide the session time for their staff without an additional charge.

15. Five veteran *Madrichim* will participate as mentors in each seminar. They will be selected by the Taglit seminar staff and recommendations for these positions will be solicited from the trip organizers. Each mentor will lead a group of fifteen participants during the seminar. Each will receive a \$500 stipend plus travel expenses per seminar for a budgeted total of \$1600 per mentor per seminar.

C. Training and evaluation seminar – content

This paper does not present a fully fleshed-out program for the training seminars as that is the task of the education team, but we are proposing a model that will bring together counselors from across the entire spectrum of the Jewish people to emphasize the value of *am Yisrael*. Because the trip organizers tend to generally serve students from distinct segments of the Jewish community, this seminar is an opportunity to jointly train counselors from diverse segments of the Jewish community that may not regularly interact with each other towards a common skill set. This joint training will reinforce the concept of *am Yisrael* that is central to the Taglit mission. The seminar will be based around heterogeneous groups of fifteen participants led by a mentor working together for much of the time on common curriculum to highlight this message. The heterogeneous groups bring together career employees of Jewish institutions with counselors that possibly signed on for a

counselor position just for the free trip. The seminar is designed to impart common skills to all first time counselors regardless of motivation. By including seasoned *madrichim* from a variety of backgrounds and trip organizer affiliations as mentors and group leaders for the seminar, the highly skilled counselor will be able to interact with the less experienced counselor and serve as role models for commonly-prized skills.

Based on our research, we have determined that there are eight common skill sets necessary for excellence among all entry-level trip counselors.

1. Group leading skills and group dynamics

Trip organizers and other interviewees all indicated that few trip staff has the confidence and ability to direct and lead a large group. This increases the burden on the Israeli trip guide and leads to a more chaotic experience for the participants. Training in how groups function and what are effective leadership and control techniques will lead to better support of the main educational objective of the trip.

2. American Jewish identity

It was widely reported that relatively few trip staff have a fully aware and realized sense of their own American Jewish Identity and what is the larger context of Jewish Identity in a changing world. This leads to insecurity in discussing Jewish identity with trip participants who are looking to engage with trip staff as they become aware of their own internal questions during the trip and a reality that trip staff is uncomfortable as Jewish role models for trip participants. Training for structured exploration, reflection and expression of personal Jewish identity as well as contextualization of personal identity in the larger American Jewish community will strengthen the confidence and ability of trip staff to be positive Jewish role models for participants.

3. Taglit Rules and Procedures

Because training as it exists now is neither consistent among trip providers nor reliant on trip staff for content delivery, the bulk of the educational content is delivered to the participants by the Israeli guides. While the guides are clearly the content experts, the trip staff can be more supportive of the context of the itinerary if they have a clearer understanding of TBI's educational objectives. Providing a clear orientation to TBI's education platform and an explanation of its methodology to trip

staff allows them to feel empowered to contribute to the larger educational mission of the trip, and also to understand the value they bring to the trip through acquisition of basic Jewish experiential education skills. In addition to that, some training hours are required for delivering the Taglit rules to the first time counselors. It is absolutely critical that counselors will be familiar with health issues, discipline issues, safety and security issues, etc. In the interviews we have learned that organizers feel that this specific training needs to remain in their hands; see #8 below.

4. Jewish Experiential Education

Taglit trips are designed as Jewish experiential education, and Jewish experiential education can take many forms over the course of a ten day trip. The Israeli guide presents some aspects of the experience, but the guide is not qualified or responsible to deliver every aspect of the experience. Trip organizers repeatedly reported the need for better skills training for their staff in delivering Jewish content and context. In brief, trip staff needs to be confident in a role of informal Jewish educator that emphasizes basic competence and understanding of Jewish content along with the ability to actively support critical content areas of the trip like the Shabbat experience.

5. US- Israel Relationships

Many trip staff board the bus with little better understanding of the complex dynamic between the United States and Israel than they had on their own participant trip. Because the dynamic and context of Israel and the Middle East is consistently in flux and the relationship of both the US government and Jewish community with Israel becomes more complex as a result, trip staff need to have a fuller understanding of the relationship than that of the average participant. This is necessary in order for the trip staff to be a better sounding board for the trip participants as they explore their own understanding of Israel as an American, and also for the staff member to be better qualified to support the Israel guide as the issue arises over the course of the trip.

6. Arab-Israeli Conflict

It was stressed by organizers that the seminars must deal with this sensitive issue.

The idea is not to study this enormous subject during the short term seminar or impart a specific position, but rather to train trip staff to develop an open mind to different points of view for discussion on the trip as the topic arises.

7. Post trip roles of the counselors

There is a debate whether the long term mission in the Jewish communities should be an integral part of the training seminar. Our opinion is that this is one of the pillars of Taglit and an informal educational program must be developed to deal with it. (The CIE model incorporates pre and post trip activity into the Canadian seminars.)

8. Balance between Organizer's Requirements and Taglit's Expectations

Trip organizers made it clear that they hire their counselors and have their own expectations unique to their trips of them. The seminars must carve out a period of time where representatives of the individual organizers can orient their own staff as to their trip methodology, expectations beyond Taglit's and other responsibilities. Dedicating this time will already implement more training contact between new counselors and trip organizers than many of them currently allocate and it will allow for dedicated time for organizers to reinforce Taglit's expectations while explaining their own trip requirements.

D. The Director of Staff Training

Our research showed that Taglit has not been able to successfully insure the quality of counselor training by entrusting it to the trip organizers. It also became clear to us that Taglit sees the improvement of counselor quality as a high priority. Therefore we propose that Taglit creates a new position at the North American level entitled Director of Staff Training.

The Director of Staff Training will be a senior employee of Taglit. He or she will be responsible for all Taglit trip staff development in the United States and can liaison with CIE as needed in this area. The Director will be a proven education leader with extensive Taglit trip experience and a thorough understanding of the many different facets of a successful Taglit trip. The Director will possess at minimum a Masters degree in Jewish education or its equivalent, Hebrew fluency, and proven leadership skills in professional development.

The Director's primary responsibility will be to fully plan the Training seminar for the first time counselors. For that purpose, appropriate skills experts will be contracted in

order to design a fully detailed plan within 120 days. The plan will include not only detailed curriculum and syllabi but also recommendations for the best trainers, mentors and educational leaders that will be available for the first training seminar.

Assuming that this plan will indeed be approved in late 2011 we assume the recruitment of the new Director to be finalized by the end of 2011 and the completion of the seminar planning by the end of April 2012. Simultaneously, logistics preparations and administration will take place to implement the seminar plan.

This is an ambitious timetable but we think that the first experimental Training and Evaluation Seminar for first time Taglit *Madrachim* can be conducted at the end of May 2012. If it is perceived to be too ambitious, the first seminar should be held in the fall of 2012.

E. Budget and Organizational Aspects

This is a model of an average seminar and its estimated pricing. Seminar core staff is the Director of Staff Training, an estimated four trainers/content providers (Group Dynamics, Jewish Experiential Education, American Jewish Identity, US-Israel Relationship) and the five mentors/group leaders. The staff will arrive at the retreat center one day before the seminar and will be fully prepared to receive the new counselors as they arrive. Each group will hold 15 participants and will be led by the mentor, the model *madrach*. The seminar will conduct 36 hours of net training: 18 hours for content training, 9 hours for organizer-specific time and 9 hours for other seminar activities like a keynote speaker or group activity.

According to our calculations, as detailed in the Table below, the cost of one seminar is estimated at \$120,000 or \$1,600 per participant.

Estimate Of An Average Seminar Cost		
1	Director of Staff Training	\$ 5,000
2	4 Trainers & Content Providers	\$ 14,000
3	Keynote Speaker	\$ 5,000
4	Organizers Staff	\$ 15,000
5	Group Leaders-Mentors	\$ 8,000
6	Seminar Participants	\$ 60,000
7	Materials	\$ 13,000
8	Total	\$ 120,000

Here are the details of our estimation:

1 – Director of Staff Training – This cost is for lodging and travel expenses with a reserve to bring additional national staff to the seminar if deemed necessary.

2 – Four Trainers/Content Providers – These personnel are priced at \$1,000 per day each for the three seminar days plus travel expenses.

3 – The budget for a keynote speaker. It is expected that some speakers from Taglit leadership & donor will receive no compensations.

4 – Trip Organizers staff – each organizer participating in the seminar will receive up to \$500 if coming from a US location or up to \$2,000 if coming from Israel to cover his travel costs.

5 – Group mentors – those are the 5 veteran *Madrichim*, each one serving as a leader of 15 participants, each one receiving a \$500 stipend plus reimbursement and lodging.

6 – Seminar participants – 75 participants at a cost of \$800 per person (see Appendix D).

We think \$120,000 per seminar is a realistically conservative estimate. There is a possibility to save money by limiting flights expenses (currently estimated at \$400 per flight), planning for shared ground transportation, etc. It is the task of the Director of Staff Training to arrange, administer, regulate and monitor the eight annual seminars. The Director of Staff Training will be responsible for the educational aspects as well as all managerial and administrative issues. He will mediate between the organizers and Taglit educational experts and will help and lead shape the seminar.

The estimated annual budget of the whole program is presented below. The budget assumes an initial investment of \$50,000 for consultants to develop the seminar's content and web site during the first year. After the first year the annual budget will be \$1.25 M. If office space will be provided by Taglit or Taglit Next, some \$50,000 can be saved annually.

Estimated Annual Budget of the Program	
Director of Staff Training	\$ 150,000
Director Expenses	\$ 20,000
Administrative Assistance	\$ 36,000
Office rental and other Office Costs	\$ 84,000
preparation of the seminar plan - Consultants	\$ 25,000
New Web Site	\$ 25,000
8 Seminars at a Cost of \$120,000 Each	\$ 960,000
Total:	\$1,300,000

Chapter 4 – Taglit Fellowship program

The need to develop the concept of the North American expert educator as a trip normative who will replace, partly and gradually, the current *Madrach* was constantly expressed in our research process. It was uniformly acknowledged that the Taglit experience is a personal one and the personality of the *Madrach* is an important factor in shaping the experience even more than the Israeli tour educator. The question is where to find the young, bright Jewish educators in order to prepare and train them as Taglit educators. How should they be screened, recruited and compensated? How should the program be administered, budgeted and monitored?

1. Locating the Reserve Cadre

Each year, scores of young Jews in their 20s who have completed college choose a career in Jewish education, Jewish studies or Jewish leadership and enroll at Jewish institutions of graduate studies throughout the United States. They continue on in careers in Jewish community organizations, synagogues and schools and are in the beginning stages of their vocational trajectory within the Jewish communal establishment. That is our target audience for this program, young professionals but already mature as far as their Jewish identity, knowledge and communal commitment to bring young Jews within the scope of the community both on the trip and afterwards at home.

Let us emphasize at this stage that before elaborating on the incentives to be offered to this group to bring them to Taglit, the challenge is to present the project as a call for action and a mobilization of talents for a historic cause. We heard during our interviews that some of these potential fellows do not have a high opinion on Taglit, perceiving it to be a free trip without educational value. The challenge is to persuade them about the potential of Taglit, change their image of it, rebrand it and then mobilize them to staff several bus tours in Israel after completing the certified one year program as presented below.

2. The plan

In chapter 3 we presented a plan for 600 *Madrachim* to participate in a three day seminar each year. For this fellowship program, we propose 100 positions for a certified one year academic training certification fellowship whose graduates will have to serve at least four trips as Taglit *Madrachim* in exchange for the program. The

program will be designed to fit the needs of full time graduate students and full time workers.

Within several years from the inception of the program, there will be a cadre of hundreds of specially trained trip educators. The majority of the North American buses will be staffed by a Taglit-certified North American educator alongside a *Madrich* who has taken the mandatory short seminar presented in the previous chapter. These new level of staff changes, along with the newly-trained Israeli tour educators, will bring about the qualitative educational changes our research indicates is desired.

The one year program will include the following:

- Online study of relevant materials and video conferences
- Three in-person week-long seminars during the academic year
- Final examination or project for certification with academic credit
- Participation in an enhanced Taglit trip to Israel specially designed for the program as an experiential training seminar
- Coverage of all expenses plus a \$5,000 stipend upon successful completion of the course

Each graduate will be obliged to:

- Serve as a *Madrich* for at least 4 trips
- Arrange for a Facebook forum or other virtual medium for their trip participants each year
- Meet the group at least 3 times within the first year after the trip either in person or on line
- Serve as a trained role model and Jewish resource for his or her group both on the trip and afterwards at home

3. Budget and Organization

While the program would be overseen by Taglit's Director of Staff Training, we propose to outsource this program to an educational Jewish organization with a record in programs that combine academic learning and implementing educational programs for Israel education. That organization will be responsible for planning, designing and implementation of the program, promotion, assistance in fund raising as needed, screening and recruitment of potential participants, the educational

program itself, all administrative matters, collaboration with academic institutions and certification. Our research shows that the ICenter, based in Chicago, is uniquely qualified to handle this type of program but other institutions may wish to propose themselves should Taglit choose to release a Request For Proposals. Whoever is chosen to manage the project will have to present a detailed budget and educational program to the satisfaction of the Director of Staff Training and the Taglit education committee.

We estimate that the total cost per participant per year will be \$12,500: \$5,000 for the stipend, \$4,500 for the cost per participant of the three seminars, and \$3,000 per participant for the remaining education and overhead costs. The trip to Israel should be covered by Taglit Israel.

Estimate of the Fellowship program \$	
No of fellows	100
Stipend per fellow	5,000
No of seminars	3
Cost per participant per seminar	1,500
Total cost per participants of seminars	4,500
Stipend + seminar expenditure per participant	9,500
Total Direct cost of stipend & seminars	950,000
Overhead for organizer (salaries, office, classes, miscellaneous)	300,000
Total cost of the program per year	1,250,000

Chapter 5 – Summary and Conclusions, Proposed Plan of Action and Expected Timetable

In the eleven years since its inception, Taglit has accomplished many achievements and it is now well known in almost every Jewish household in North America. First, there is the quantitative success of bringing some 300,000 young Diaspora Jews to Israel, almost 5% of North American Jewry, most of them for the first time. Second is the educational qualitative achievement: ongoing research testifies to the unique impact of the ten day tour on Jewish identity, a life changing experience. This is the main reason why Donor, Foundations, Federations and the Israeli government keep investing money in Taglit on an increasing scale. The goal is to reach the point where a majority of young Jewish adults will participate in a Taglit trip.

In order to sustain and enhance the experience to be able to take advantage of it at the post Taglit stage, an initiative was developed to upgrade the educational standards of Taglit. A new set of educational standards and objectives was prepared by Drs. Barry Chazan and Zohar Raviv emphasizing the educational challenges of Taglit. It is largely accepted that the most important factor affecting any educational experience is the quality of the bus staff who serve as educator, teacher, leader, role model. In the case of Taglit it is the three staff on the bus that make the difference and any educational improvement must begin with them: their background, their motivation, their quality as leaders, their knowledge and their identification with the Taglit message.

Our research work here, together with our previous study of Israeli tour guides, deals with this issue and asks whether it is justified to invest money in designing special programs, indeed costly ones, to improve training for the trip leaders. It is our opinion that the training programs discussed here which involve investing some \$2.5 M per year is a reasonable investment. Out of more than \$100 M invested in the trip program each year, a relatively small amount, less than 3% of that total sum needs to be invested each year to keep high educational standards and to enhance them permanently. Our Taglit fellowship program, which costs \$ 12,500 per participant, reasonably compares with Birthright NEXT program that gave out sixty \$10,000 stipends for post-programming fellows this year. Given the multi-years impact potential of the Taglit Fellowship, the cost is not inordinate.

It is not feasible to staff the buses with 1,200 top educators so we came up with what we think is a reasonable solution: upgrade the current *Madrichim* by providing them with a short mandatory training seminar with the best veteran *Madrichim* role models, the best educators and the best expert trainers so that they understand their role and acquire the basic background, skills and knowledge to facilitate their performance and operation during the trip. Additionally, train a corps of committed Jewish professionals who are willing to develop an expertise in trip education and infuse them in to the bus staffing process in order to provide highly-trained role models and resources for participants both during and after the trip. This is the two tier program that we propose.

No matter how impressive the Taglit experience may be, its final proof is in its long lasting effect on the Jewish community and for that we need to hire and train the best young educators so they will serve as a role model not just on the trip but also post trip. This is where the challenge is, to offer a model of a meaningful Jewish life with a wide spectrum of choices and interpretations so that each can choose what is most appropriate for him in a context of some communal, collective attachment and solidarity. There is no future Jewish life without a sense and a practice of belonging to a wider collective body.

As for the plan of operation and its schedule, the plan must be first approved by the donor and by Taglit and financial resources for operating the two tier scheme for several years will need to be earmarked. The next step will be to recruit the Director of Staff Training. He or she will have to deal simultaneously with the two programs, coordinate between Taglit, the donor, the operator of the fellowship program and with dozens of learning institutions and organizations which need to be involved in this very challenging task ahead. The Director of Staff Training will need to work closely with the trip organizers as they will need to be integrated into the plan. We believe the first short pilot seminar can start before the next summer season and the fellowship in the next Academic year in the fall.

We trust that the proposed transition of trip staff from "one Tour Guide plus two chaperones" to a staff of "one Israeli Tour Educator, one Taglit Fellow and one *Madrich* Taglit" will raise the bar of excellence for Taglit trip content and follow-up and its long-term impact on the North American Jewish community and its relationship with Israel.

APPENDIX A

CIEMadrichim Development seminarThursday

- 5:30 pm **Ice Breakers/ team Building**
 7:30 pm **Deciphering the Tribe**
 8:30 pm **Opening Ceremonies**
 9:30 pm **Hopes and Expectations (7 small groups)**

Friday

- 8:00 am **The 11th Day: Starting from the End**
 9:45 am **Cardboard Regatta (10 groups of 6)**
 1:00 pm **Group 1: The D Word**
 Group 2: Logistics 101
 3:15 pm **Group 1: CIE's Guide to the Programming Galaxy**
 Group 2: The Mifgash Program
 7:00 pm **United Kabbalat Shabbat**
 7:45 pm **Shabbat Programming**
 10:00 pm **Picturing Israel (6 small groups)**

Saturday

- 8:00 am **Traditional Services (optional)**
 9:00 am **The Art of story Telling Values Clarification Exercise**
 11:30 am **Case Studies: Part One**
 2:30 pm **How to Lead a Jewish Program (6 small Groups)**
 4:00 pm **Case Studies: Part two**
 7:30 pm **Community Meetings**
 10:00 pm **Bonfire and Free Time**

Sunday

- 8:00 am **Israel: the Sequel**
 8:30 am **Group 1: Magical Mystery Tour Bus**
 Group 2: Israel Update
 10:30 am **Feedback Session (6 Small Groups)**
 12:00 pm **Closing Ceremonies and Farewell**

APPENDIX B

T-BI Aleph Training: Topics for BRI 24

Session 1

- **Taglit-Birthright Israel: Why do we do this?**
- **Our roles as Taglit-Birthright Israel staff**
 - **Leader**
 - **Communicator**
 - **Role Model**
 - **Educator**
- **The difference between our expectations based on our personal experiences and our expectations for our students**
- **Possible student reactions in Israel**

Session 2

- **Taglit's Educational Requirements**
- **Thinking about Education During the Trip through the Lens of Hillel's "Four Bubbles"**
- **Three Types of Educational Opportunities**
 - **Expected**
 - **Organic**
 - **Structured (The Conversations)**
- **Planning for Educational Opportunities**

Session 3

- **Getting to Know Students Before the Trip Experience**
- **Keeping Track of What's Happening for Students During the Trip Experience**
- **Following Through with Students After the Experience**
- **Preparing Students for the Experience: Pre-Trip Education Sessions**

Session 4

- **Roles in groups**
- **Group development theory**
- **Affect, Behavior, Cognition of Groups**
- **Group dynamics – case studies**
- **Shabbat as a group experience**

Session 5

- **Taglit-Birthright Israel – the trip, the rules, the brand**
- **Health and safety procedures and rules**
- **Discipline**
- **Support structure**

Conversations (Session 6)

- **What are the Conversations? What is their context? What is their content?**
- **How do we introduce and facilitate the Conversations?**
- **Which tools can be used to connect the individual to the collective?**

APPENDIX C - Statistics

TAGLIT 2011 - VITAL DATA AND STATISTICS				
TABLE 1: PARTICIPANTS, GROUPS AND COUNSELORS				
	WINTER TRIP-23	SUMMER TRIP-24	ANNUAL	
PATICIPANTS	10,079	15,440	25,519	
GROUPS	241	370	611	
COUNSELORS	482	740	1,222	
PERCENTAGE	39.40%	60.60%	100.00%	
TABLE 2: FIRST TIME AND VETERAN COUNSELORS				
	COUNSELORS	PERCENTAGE		
VETERANS	422	34.60%		
FIRST TIMERS	800	65.40%		
TOTAL	1,222	100.00%		
TABLE 3: ORGANIZERS BY TYPE				
	WINTER - TRIP 23	SUMMER - TRIP 24		
NON PROFIT	10	10		
FOR PROFIT	5	7		
TOTAL	15	17		
TABLE 4: PARTICIPANTS BY TYPE OF ORGANIZER				
	WINTER-TRIP 23	SUMMER TRIP-24	TOTAL	%
NON PROFIT	5,761	8,279	14,040	55%
FOR PROFIT	4,318	7,161	11,479	45%
TOTAL	10,079	15,440	25,519	100%

JEWISH POPULATION IN THE UNITED STATES 2011				
Region	%	Division	%	
Northeast - 2,871,000	43.80%	1. New England - 448,000	6.80%	
		2. Mid- Atlantic - 2,423,000	37%	
Midwest - 694,000	10.60%	3. East North Central - 558,000	8.60%	
		4. West North Central - 136,000	2.00%	
South - 1,353,000	20.80%	5. South Atlantic - 1,164,000	17.80%	
		6. East South Central - 42,000	0.80%	
West - 1,619,000	24.80%	7. West South Central - 147,000	2.20%	
		8. Mountain - 291,000	4.50%	
		9. Pacific - 1,328,000	20.30%	
Total - 6,357,000	100%		100%	

Appendix D – Summary of proposals from four sample retreat centers

Regional Facility Rental	Room and Meeting Space Rates (assuming weekday rental)	Food	Participant Travel	Material Supplies	Additional fees
Mid-Atlantic (Pearlstone Retreat Center - Maryland)	\$105 per person per night, double occupancy. Meeting space is included.	Room rate includes 3 meals and 2 snacks.	\$400-\$500 per person for flights. (Do we factor in travel between the sites and the airports?)	\$2,000	2.4% Lodging Tax
Midwest (Perlstein Retreat Center - Wisconsin)	\$88 per person per night, double occupancy. Meeting space is included in cost.	Included in the room rate are three meals a day and one snack. Additional meals are between \$8-\$15 per person. Additional snacks and drinks are charged on a consumption basis.	\$400-\$500 per person for flights. (Do we factor in travel between the sites and the airports?)	\$2,000	Additional charge for use of ropes course.
Northeast (Isabella Freedman Retreat Center - Connecticut)	\$225-\$250 per person per night, double occupancy. Includes meeting spaces in cost.	Included in the room rate.	\$400-\$500 per person for flights. (Do we factor in travel between the sites and the airports?)	\$2,000	10% mandatory gratuity on the entire cost. If the seminar is scheduled over the weekend, the cost increases \$25 per person per day.
West Coast (American Jewish University: Brandeis-Bardin Campus - California)	\$110 per person per night, double occupancy. Meeting space is included in cost.	Included in room rate are three meals a day and snacks	\$400-500 per person for flights. (Do we factor in travel between the sites and the airports?)	\$2,000	Optional security guard \$150.00 a day. Additional charge for ropes course or other programs.

Appendix E – List of Interviewees

Taglit – Liz Sokolski, Barry Chazan, Zohar Raviv, Ehud Afek, Ofira Bino, Scott Copland

Taglit Next – Morley Levin

Yad Ben-Zvi – Yael Goodman

CIE – Michael Solberman, Heday Offaim,

Tlalim – Efrat Lavi, Roi Porat, Avi Green, Corine Warszwaski

Shorashim – Naomi Shapiro, Udi Kraus, Michal Tamim

Keshet – Ezra Korman

Israel Experts– Gia Arenstein, Joe Perlov

Maayanot – Danny Sack, Kedma Wiseman, Rabbi Eliezer Sneiderman

Hillel – Esther Abramowitz, Raina Goldberg, Andrea Hoffman

Israel Experience - Eran Appelbaum, Tal Zmiri

Icenter – Anne Lanski, Adam Stuart

OU – Rabbi David Felsenhal

YU – Shuki Taylor

Brandeis University – Dr. Len Saxe

Young Judea – Yael Libedinski

JEP – David Brytman

Foundation of Jewish Camps – Rabbi Avi Orlow

Simon Klarfield

URJ – Yehudit Werchow, Corine Warszwaski

JAFI Avi Chai – Shalom Orzach

Pardes – Dr. David Bernstein