

EXECUTIVE SUMMARY

ADVANCING JEWISH RETREATING

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Photographs courtesy of Ramah Darom - Kaplan Mitchell Retreat Center

EXECUTIVE SUMMARY

The retreating research, undertaken between June 2018 and May 2019, is a first attempt to draw a map of Jewish retreating that includes both organizers of Jewish retreats and operators of Jewish retreat centers. The research examines how retreating has been adopted by a vast array of organizations, what issues facilitate or impede their efforts, and what current levels of activity portend for the future of Jewish retreating.

The study was multimethod and included (1) surveys of Jewish retreat organizers and retreat facilities operators; (2) interviews with key informants and retreat organizers; and (3) participant observation at three distinctive multiday retreats.

The report aims to assess the opportunities facing organizers and operators and to inspire conversation, action, and support among all those with an interest in Jewish retreating.

DEFINITION

Jewish retreating, with its vast variety of players, is best conceived of as an ecosystem of organizers and a separate, but related, ecosystem of operators.

There is general agreement that retreats are immersive experiences that remove people from their everyday lives and bring them into an intentional community space. The research uses *retreat* as a generic term to refer to all such experiences, whether called Shabbaton, encampment, festival, overnight, conference, or another name.

Four key roles are necessary to produce a retreat:

Facility operator: site manager or vendor who provides the facilities and services for the event.

Retreat organizer: organization that uses the event to engage its audience and fulfill its mission.

Program designer and/or implementer: event planner or program professional who plans and drives the program.

Talent: teachers, facilitators, clergy, artists, performers, and others who enlighten, inspire, and entertain the group.

Jewish facility operators have their own ecosystem that overlaps with and exists apart from that of the organizers.

Of the 42 operators in our study, 25 are also organizers who develop, market, and run their own retreat programs. The other 17 serve only outside

clients and do not have their own retreat programs. With only four exceptions, all of the retreat centers are also the sites of Jewish overnight camps. As such, retreat operators generally know one another and are connected through their camp movements or their association with the Foundation for Jewish Camp.

Jewish retreat organizers come from vastly different parts of the Jewish community.

They may be in the religious, spiritual, educational, cultural, social, or social welfare sector; or they may be a federation, foundation, fellowship or leadership development program, or any other sort of Jewish organization. Jewish retreat organizers also differ in terms of purview (local, regional, national, international), organization complexity (from informal grassroots groups to well-established complex organizations), and retreating experience (from first timers to those who have run retreats for decades). There are no formal ties among retreat organizers, no comprehensive directory, no convening umbrella organization, and little common training or shared knowledge base.

GROWTH OF JEWISH RETREATING

Jewish retreating is a large and growing enterprise for both retreat organizers and operators.

Organizer interviewees tell stories of steep growth in the number of retreats offered, total number of participants, addition of new locations and audiences, and new program themes and content.

Almost all respondents to the organizer survey are running retreats this year, suggesting that those who are retreating are continuing to do so. The majority

of organizers also have ideas for other types of retreats they would like to offer (68%) or other target audiences they would like to reach with their retreats (52%). Respondents are also clear on what is needed to expand or improve their retreats—personnel, talent, marketing and recruitment, facilities, logistics, and program design—leaving no doubt that there is room for capacity building on the organizer side.

Overall, Jewish retreat centers have seen notable growth in numbers between 2015 and 2018, but a decline in Jewish participation.

Time series data show an overall 15% increase in the number of retreats hosted and a 4% increase in the number of participants at these retreats. At the same time, the average percentage of Jewish-sponsored retreats and Jewish participants declined by 6% and 11% respectively. The survey of over 200 Jewish retreat organizers shows that they use a variety of settings for their retreats, of which only 40% are held in Jewish spaces.

The organizer survey identified 93 organizations that are currently not retreating. Just over one fourth of these organizations report having both the interest and capacity to run retreats.

If this percentage holds more broadly, there are potentially hundreds of organizations ready to join the world of Jewish retreating.

In addition to the efforts of individual organizations, contextual dynamics are also propelling continued growth in Jewish retreating.

Dynamics include the emergence of Jewish engagement as an organizing principle for Jewish communities; the professionalization of experiential Jewish education; the prevalence of technology and the universal need to “unplug”; as well as the particular characteristics that make the millennial generation a ready audience for retreating.

THE CASE FOR RETREATING

Retreats add unique value to an organization's work that could not otherwise be accomplished. In other words, there is no substitute for a retreat.

Retreats uniquely contribute to the work of the organization by providing the time, space, and environment conducive to individual and group development.

As one interviewee noted, being away from home seems to “spark some kind of magic, some alchemy,” not unlike the magic of overnight camp. Specifically:

- Removal from everyday life can lead to personal and professional transformation.
- Relationships and community are built at retreats in ways not possible at school, in the workplace, or in the community back home.
- Retreats can be booster shots that help participants remember and regain a “sense of amazement.”
- Retreats offer special experiences for micro-communities (e.g., LGBTQ gatherings).
- Retreats offer the gift of time.
- Retreats can be a laboratory for testing out new ideas for community.
- Holding retreats over Shabbat gives participants a new experience of Shabbat. It amplifies the notion of unplugging from everyday life, the practice of mindfulness, and the experience of spirituality.

The most common purposes for retreats, as per the organizer survey, are community

building, Jewish education, Shabbat or holiday celebrations, and spirituality.

Other purposes are also represented in the study (e.g., leadership or professional development, relationship building, health and wellness, outreach, and simple R&R).

Part of the power of retreating is that one retreat event can serve multiple purposes.

Jewish education at a retreat, for example, can more readily be integrated with the aims of community building and Shabbat observance than it can be in the classroom.

Retreats help fulfill organizational mission by melding with and enhancing the organization's program year. Organizers integrate retreats in five different ways.

1. **Program scaffolding.** Some organizers hold regular retreats throughout the year as part of a fellowship, internship, or leadership development program. The timing of the retreats is designed to fit in with the flow of the program and provide booster shots at appropriate times in the participants' development.
2. **Calendar markers.** Some organizers hold regular retreats across the year as part of their program. These retreats do not have the same tight structure as the time-delimited fellowships above, nor are they integrated into a curriculum in the same way.
3. **A la carte menu.** Some national organizers run multiple retreats over the course of a year. These retreats are not organized around a fellowship or program but rather are designed to reach different demographics in different geographic locations.
4. **Single annual retreat.** Some organizers—commonly congregations or certain micro-communities—run only one retreat a year.

5. **Annual retreats with an arc.** Some Jewish day and part-time schools run annual retreats for different age or grade cohorts. Each retreat is distinctive as it is designed for the arc of the students' education across their school years.

Retreats have different benefits for local, regional, and national organizers.

The community created at a local retreat readily redounds to the community back home. Face-to-face time at national retreats enables participants to establish strong ties with peers or colleagues across the country and to develop the capacity to work together. Regional retreats are practical tools for national entities as they help them diversify location, increase the number of people who can be accommodated, and contain participants' travel costs.

Retreats are a natural tool for micro-communities as they can offer intensive experiences for small groups of individuals with similar interests and needs.

Retreats are particularly well suited to the millennial generation (born 1981-1996). According to one informant, "retreats are by far the best methodological tool for engaging millennials."

MATCHING OPERATORS AND ORGANIZERS

Jewish facility operators are looking to fill beds and weeks at their retreat centers, and organizers are seeking appropriate venues for their events. Making the match, however, is not as easy as one might assume.

In selecting a venue, cost is the top criterion for the great majority of organizers, often along with quality and location of facilities.

Some organizers have considered lowering costs by reducing the size or length of their retreats, seeking grants or other funding to underwrite costs, or finding ways to improve cost efficiency. Other considerations are also important (kosher food, capacity, scenic location, customer service, accommodation for special needs, etc.), but for far fewer organizers. Organizers concerned with kashrut are limited to the 21 Jewish retreat centers (out of 42) with certified kosher facilities.

Most of the organizers interviewed can make do in non-Jewish settings.

Indeed, given considerations of location, capacity, comfort, and cost, organizers often have no viable Jewish options. Consider, for example, that only three of the 42 participating facilities are open 12 months a year. Of the 30 facilities with both 2015 and 2018 data, 16 had reduced the number of weeks open per year, and 14 had maintained or increased them.

Some 60% of respondents to the organizer survey say that having an easy way to find appropriate facilities for their retreats would be a significant help to their organizations.

Searching for retreat sites can be all consuming and divert time and energy from the other tasks involved in a successful program. Although there are general websites for finding retreat centers, Jewish organizers may need a service more like a matchmaker than a dating app.

Jewish retreat centers have diversified client lists and use their properties for all sorts of events and purposes.

While the number of retreats and participants at these facilities has grown between 2015 and 2018, non-Jewish groups and individuals have increased as a percentage of total business. This balance may be a necessary business model, or it may reflect a need for improved services and marketing to Jewish groups.

PRACTICAL CONCERNS

Retreat organizers need assistance with the practical concerns of cost, staffing, and marketing. They also need help developing post-retreat evaluations and activities. Follow-up activities are instrumental to the long-term impact of the short-term immersive experience.

About half of the Jewish organizers run retreats in which fees cover the full cost; the other half do not.

Organizers do not want price to be a barrier to participation. The great majority provide scholarships, discounts, or other support to participants. Many of the organizations have a budget line for retreats. Others depend on general operating funds or donor support, or they figure it out ad hoc.

A few of the larger organizers have significant resources, and cost is not a major consideration. A few of the very small organizations are nimble enough to keep costs low. Other organizations, however, face increasing costs and continuing difficulty finding outside funding sources.

One organization, for example, reported a 10% increase in the cost of its retreat from 2018 to 2019.

Just over 60% of respondents to the organizer survey say they need more personnel dedicated to organizing retreats in order to grow and enhance them.

Most of the organizers (74%) have a designated person responsible for retreats. Some (44%) hire outsiders to plan, organize, or implement all or part of the retreat program.

Interviews reveal that some of these organizers (outside of the largest) are not fully staffed for running retreats.

Issues arise when a single person is charged with both logistics and program. If no one else on staff can assume responsibility for the former, the educator is forced to spend less time on vision and content in order to assure quality control and smooth operations. Some of the fellowship and training programs have developed a model in which participants are tasked with designing and running retreats as part of their training or their alumni experience.

Some 60% of respondents to the organizer survey say that better promotion, marketing, and recruitment would help them improve their retreating activities.

Indeed, 41% do not sell out their retreats. A few organizers have viable participation numbers but reach a relatively small percentage of their potential audience. Like any event in the Jewish community, retreats compete with a host of other activities for participants' time and attention.

Most respondents to the organizer survey (86%) follow up with participants post retreat. Despite a list of follow up activities—everything from take-home packets, webinars, or Facebook groups to micro-grants for participants to run their own events—efforts in any one organization are generally limited.

According to interviewees, the issues are lack of resources (most notably staff and time) and lack of models for fuller and more engaging follow up.

Most organizers (73%) conduct formal evaluations of their events. According to interviewees, however, these efforts are largely pro forma.

Organizer interviewees admit that their evaluations are not of high quality and that results are not methodically reviewed and applied.

ONWARD

Evidence suggests that support and capacity building could help organizers significantly improve and expand their retreats and help operators secure a larger piece of the Jewish market. As exploratory research, the report does not provide a blueprint for the future, but it does offer data to stimulate conversation and action in four areas: capacity building, structure, investment, and research.

It is not difficult to make the case for Jewish retreating.

Jewish retreats are immersive experiences that touch the total participant—mind, body, and soul. They are the quintessential setting for experiential education that can deepen Jewish learning and practice. They offer Jewish organizations a powerful tool for fulfilling their mission and building community among their participants and leaders. They are a laboratory for new forms of Jewish community and life. Jewish retreating is growing in terms of numbers, reach, and content, and the data suggest that it will continue to do so.

A key question for individual operators is how to build the Jewish part of their work.

Operators need to understand the gap between what they are offering in terms of price, location, accommodations, or services and what Jewish organizers are seeking. And operators need to determine what it will take to close this gap.

A key question for operators writ large is how to address the limited options for Jewish space.

Options are limited by weeks per year in operation, availability of kosher facilities, geographic location,

number of beds, and the like. Adding new retreat centers may not be the solution. Most Jewish organizers in the study are not convinced they need Jewish space and have been doing well without it; and current Jewish facilities are not fully booked or are not fully booked with Jewish groups.

Organizers would benefit from better promotion, marketing, and recruitment for their retreats; assistance in finding appropriate sites for their retreat events; stronger follow up, evaluation, and measurement of impact; and help with raising funds to make their retreats more widely affordable.

Such support might take the form of training, coaching, convenings of organizers, resource banks, education, or other such format.

Retreating is probably best thought of as a universal tool with many forms and uses.

It draws on diverse sources (experiential education, hospitality industry, hotel management, group dynamics, community organizing, spiritual counseling, life coaching, etc.) and can be put to use most anywhere. Retreating is the Swiss Army Knife of Jewish life. As such, capacity building efforts should precede or inform the creation of structure.

Jewish retreating needs structures that can promote it as a valuable tool, improve its use, create forums for learning and sharing, and harness the expertise needed to build capacity among organizers and operators.

A structure for organizers needs to accommodate their great diversity and help them see their shared interests. Convenings or networks of subgroups might help organizers raise the level of their work, find the resources they need, generate new ideas, and learn new techniques and best practices. Operators—who know each other through their camp affiliations—may be ready for a more formal collaborative structure that promotes information and

resource sharing. The focus might be on operations, administration, leadership, programs and services, marketing, technology, or other parts of the business that could benefit from shared resources, new ideas, best practices, and benchmarks.

Additional funding for Jewish retreating could make a substantial impact.

Funding is needed to support capacity building (as described above) and provide scholarships and subsidies that will make Jewish retreating accessible to larger numbers.

Research can also add to the momentum of Jewish retreating in four ways:

1. Understanding the impact of different types of retreats on participants and their organizations and communities back home.
2. Establishing best practices for both operators and organizers.
3. Learning more about Jewish retreat facilities and diving deeper into questions about the operators' Jewish purpose, marketing activities, business model, and vision for Jewish retreating and their role in it.
4. Testing the feasibility of action proposals that emerge from the current research and establishing priorities for action.