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Commission on Jewish Continuity. Boston, Mass., 1989-1993.

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COMBINED JEWISH PHILANTHROPIES

O F G R E A T E R B O S T O N

JOEL B. SHERMAN
President
BARRY SHRAGE
Executive Vice President

One Lincoln Plaza
Boston, Massachusetts
02111
617 330 9500
Telex
617 330 5197

June 13, 1989

Mr. Morton L. Mandel
4500 Euclid Avenue
Cleveland, Ohio 44103

As a community that has a major stake in college-age services, we will be taking a look at our student population in our Commission on Jewish Continuity. I'm hoping that this can emerge as a major priority and that we can develop some models that can be useful around the country.


In my view, our work on the campus can and should focus on providing work experiences and training for students in Jewish education and Jewish communal service. This might provide both short and long-term benefits with regard to our personnel challenge.

Mort, I've recently met Richard Joel, the new international director of Hillel. I believe he would be a real asset to your national commission. In any event, some Hillel representation might be helpful in dealing with the continuing issues that affect students directly and in helping to make the best use of our student and campus resources in dealing with the personnel challenge.

Thanks so much for considering this thought.

Best regards to Barbara.

Sincerely,


Barry Shrage

BS:mm

8/28/89

MLM:

I attached the letter that you had asked about (regarding if it had been sent out). It was sent on 7/25 and it is the same letter that VFL attached for your approval.

sk

9/5 VFL
Here is the
story - I should
have sent you a
copy to
close
loop

MORTON L. MANDEL

4500 EUCLID AVENUE • CLEVELAND, OHIO 44103

July 25, 1989

Dear Barry:

Thank you for your recent letter in which you suggest that we include Hillel representation in the activities of the Commission on Jewish Education in North America. I agree with you! College youth represents an important segment of the population we wish to reach, and the Commission staff will consider ways to involve Hillel in our work.

Thanks for sharing your thoughts with us -- we will do our best to implement them.

Warmest regards.

Sincerely,

MORTON L. MANDEL

Mr. Barry Shrage
Executive Vice President
Combined Jewish Philanthropies
of Greater Boston
One Lincoln Plaza
Boston, MA 02111

Stanon-

PLEASE CHECK
MY CORRESPONDENCE
FILES, I BELIEVE
THIS LETTER WAS
SENT ALREADY, LET
ME KNOW
— m

CORRESPONDENCE INSTRUCTIONS

Date: 8/24/89

To: MLM

From: VFL

FOR	PLEASE
Approval <input type="checkbox"/>	Advise <input type="checkbox"/>
For Your Action <input type="checkbox"/>	Note and File <input type="checkbox"/>
More Details Needed <input type="checkbox"/>	Note and Return <input type="checkbox"/>
Your Comments <input type="checkbox"/>	Read and Destroy <input type="checkbox"/>
Your Information <input type="checkbox"/>	Investigate and Report <input type="checkbox"/>
Your Signature <input type="checkbox"/>	See Me <input type="checkbox"/>
Returned as Requested <input type="checkbox"/>	Reply (Response Needed By) <input type="checkbox"/>
<input type="checkbox"/>	Initial and Forward To: <input type="checkbox"/>

REMARKS: Attached is the draft letter
to Barry Shrage and the
letter to which it responds.
Please revise as you wish
and return to me for finalization.

(use reverse side if more space is needed)

73562 (REV. 10/86) PRINTED IN U.S.A.

Draft - 7/18/89

July 17, 1989

Dear Barry:

Thank you for your recent letter in which you suggest that we include Hillel representation in the activities of the Commission on Jewish Education in North America. I agree with you that college youth represents an important segment of the population we wish to reach in improving the quality and quantity of Jewish education personnel. The Commission staff will consider ways to involve Hillel in our work.

Thanks for sharing your thoughts with us. We will do our best to implement them.

Cordially,

Morton L. Mandel
Chairman

Mr. Barry Shrage
Executive Vice President
Combined Jewish Philanthropies
of Greater Boston
One Lincoln Plaza
Boston, MA 02111

MG

TO: Morton L. Mandel
NAME
DEPARTMENT/PLANT LOCATION

FROM: Henry L. Zucker
NAME
DEPARTMENT/PLANT LOCATION

DATE: 10/26/89

REPLYING TO
YOUR MEMO OF: _____



SUBJECT:

I had a very good talk with Barry Shrage. He is very pleased to be invited to the next meeting of the Commission in March and looks forward to it.

Barry has a special problem which he would like you to be aware of and to see whether you can be helpful in relation to it. Barry's new chairman of the board (Barry is now called president) is Ed Sidman, an entrepreneur in the building business, who is not particularly geared into formal Jewish education. He knows this is a high priority for Barry, and Barry would like to see it become a higher priority for Sidman.

Sidman is a \$500,000 contributor to the annual campaign and was the chief factor in the building of a new JCC in Boston. He loves anything having to do with building and he has some appreciation for the JCC program. Barry believes that you and people like you would have a major influence on Sidman through his becoming acquainted with why you are concerned about Jewish continuity and Jewish education and also why formal education and informal education are interconnected.

Barry will bring Sidman to the November 17th meeting of the council presidents which you will address. He hopes that there will be an opportunity for you to meet Sidman and him after the meeting. He also hopes that if you should have occasion to run into Ed Sidman, that you engage him in a conversation about why you and other community and business leaders have a concern about Jewish continuity, and why you are investing your time, energy, and money in formal and informal Jewish education.

I told Barry that I was sure you would be very happy to meet him and Sidman at the conclusion of the November 17th meeting, and also that you would keep your eyes open to an opportunity to meet Sidman personally.

INTER-OFFICE
CORRESPONDENCE

COMBINED JEWISH PHILANTHROPIES

O F G R E A T E R B O S T O N

EDWIN N. SIDMAN
Chairman of the Board

BARRY SHRAGE
President

One Lincoln Plaza
Boston, Massachusetts
02111
(617) 330-9500
Telefax
(617) 330-5197

October 27, 1989

Mr. Morton I. Mandel
Premier Industries
4500 Euclid Avenue
Cleveland, Ohio 44103

Dear Mort:

As a follow-up to my conversation with Ann Klein and Hank Zucker, I thought I'd put a few thoughts in writing on some of the exciting potential I see growing out of our new Commission on Jewish Continuity here in Boston. This potential could make Greater Boston an attractive "model community" for national development efforts. (The Mission Statement and Workplan of the Boston Commission are attached.)

Though I know that you are months away from decision-making, I thought I'd share a few ideas that might also prove useful as you build your "model community" process.

I'd like to suggest that, in general, the national Commission's strategy might focus on providing challenge grants designed to leverage local funds. Among the criteria that could be considered would be:

- a) a well developed community-wide strategy with real connections to grassroots delivery systems;
- b) an emphasis on inter-agency coordination;
- c) the use of national funds, for the development of training centers linked to local funding to assure exciting new programs and job opportunities for those who are trained;

- d) coordination of training and program strategies so that training for formal and informal educators is directed toward the educational programs, strategies, and delivery systems of the future, rather than current systems.

For the purpose of this brief letter, I'd like to use family education as an example of some of our preliminary thinking.

I recently had a chance to speak at the JESNA Northeast Regional Conference on Family Education. Everything I heard there confirmed my sense that one of the most effective strategies for strengthening Jewish families and ensuring Jewish continuity is work with congregations and centers -- the "gateway" institutions -- to develop parent and family education. //

As we've discussed, the success of this part of our vision for Jewish continuity will rest on two points: the involvement of the congregations and the ability to recruit, train, place and support a well prepared, professional parent and family educator for most congregations or sets of congregations. This in turn means the creation of a Parent and Family Institute, to provide the new kinds of training the field requires for both full-time, professional senior educators, and for the many part-time, avocational personnel who will undoubtedly continue to play a major role in our supplementary schools. The Institute would also involve ongoing support for these educators, and the appropriate research and inquiry base to explore and evaluate new developments and programs.

In that regard, I wanted to let you know about a promising new development here in Boston. It looks as if two of our major resources with something to contribute to such an Institute, Hebrew College and the Hornstein Program at Brandeis, are interested in working on it in partnership.

Hebrew College is our community's major institution for practitioner-oriented Judaica teaching. They have recently changed their program to emphasize part-time, flex-time Masters' level programs, targeted primarily to educators and communal professionals. They have made great strides in learning to be responsive to needs in the field.

October 27, 1989

I know that I don't have to tell you about the Hornstein Program. In addition to the cachet of the Brandeis name -- which will not be incidental when it comes to recruiting -- there is an outstanding faculty, some of whose members are already well known for their expertise in Jewish education, Jewish family education and community organization.

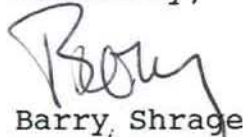
What we have begun talking about is a partnership in which, with the full assent and support of the congregational world, both institutions would contribute from their respective strengths. As an example, Brandeis, which has a track record of running successful conferences, is already thinking about a conference for key congregational leaders, including rabbis, to help them begin to understand what it means to create responsive institutions; and also about what would be required in a curriculum for family educators. Hebrew College is currently running both a Principals' and Teachers' Institute, which the educational professionals involved have helped to design, and which combine Judaica studies with attention to current educational issues and to mutual support among the participants.

The development of a joint effort represents a real breakthrough for us and I am really excited at the possibilities that their willingness to be partners offers, and at what it suggests for Boston's Jewish educational future. In addition, I believe we can insure congregational participation in an Institute's development, so all parts of the system would be in place.

To complete the picture, I believe CJP leadership would consider (through the Commission on Jewish Continuity) providing a significant incentive (up to fifty percent of the cost) to any synagogue or JCC willing to hire a parent educator trained by the Institute. This means that any investment in the "Boston Family Educator Institute" would have an assured source of trainees, all of whom would have guaranteed internships and jobs after graduation. Moreover, national funding for such an Institute could be provided as a challenge grant contingent on local funding for the family educators themselves. This would provide real leverage for any national grant.

I hope we can talk about this a bit at the General Assembly. In the meantime, best wishes for a happy and healthy New Year for you, Barbara and your family.

Sincerely,


Barry Shrage

BS:mm

MORTON L. MANDEL

4500 EUCLID AVENUE • CLEVELAND, OHIO 44103

November 13, 1989

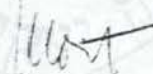
Dear Barry:

I read with special interest your letter of October 27 underscoring the importance of family education through congregations and your thoughts for establishing a model program in Boston. I hope that we can find time to discuss this at the General Assembly or at some other time.

As you know, we are not yet ready to identify communities to implement the recommendations of the Commission on Jewish Education in North America. However, I plan to share your letter with the Commission's senior policy advisors and to refer to your suggestions as we clarify the role of proposed "Community Action Sites" and the locations of these Sites.

I look forward to seeing you in Cincinnati.

Sincerely,



Morton L. Mandel

Mr. Barry Shrage
Combined Jewish Philanthropies
of Greater Boston
One Lincoln Plaza
Boston, Massachusetts 02111

COMMISSION
ON JEWISH EDUCATION
IN NORTH AMERICA

4500 Euclid Avenue
Cleveland, Ohio 44103
216/391-8300

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Director

Henry L. Zucker

Staff

Mark Gurvis
Virginia E. Levi
Joseph Reimer

November 20, 1989

Mr. Barry Shrage
Executive Director
Combined Jewish Philanthropies
of Greater Boston
One Lincoln Plaza
Boston, Massachusetts 02111

Dear Barry:

It was good to see you at the G.A. As promised, I am enclosing a copy of Schorsch's Education Cabinet, which has been invited to meet with Morton Mandel on January 26, 1990, in New York. Please let me know if you have any thoughts after seeing the list, or if there are names that are glaringly absent.

Sincerely,



Mark Gurvis
Commission Staff

Enclosure

CHANCELLOR'S EDUCATION FORUM as of 10/89

NOV 09 1989

Rabbi Paul Freedman
United Synagogue Youth
155 Fifth Ave.
New York NY 10010

Dr. Aryeh Davidson
The Seminary

Dr. Robert Abramson
United Synagogue
155 Fifth Ave.
New York NY 10010

Dr. John Ruskay
The Seminary

Ms. Judith Siegel
The Jewish Museum
1109 Fifth Ave.
New York NY 10028

Dr. Eduardo Rauch
Melton Research Center

Mr. S. Hirsch Jacobson
Solomon Schechter Day School
721 Orange Ave.
Cranford NJ 07016

Dr. Steven M. Brown
Solomon Schechter Day School
Old Lancaster Rd./Highland Ave.
Bala Cynwyd PA 19004

Dr. Raphael Arzi
3 Mevo Hamavaag
Jerusalem ISRAEL

Dr. David Lieber
University of Judaism
15600 Mulholland Drive
Los Angeles CA 90077

Mr. Richard S. Moline
Jewish Youth Directors Assn.
United Synagogue of America
180 N. Michigan Ave. Ste. 1710
Chicago IL 60601

Dr. Sheldon Dorph
261 So. LaPeer Drive
Beverly Hills CA 90211-2617

Rabbi Joel Meyers
The Rabbinical Assembly



Brandeis University

MAR 02 1990

Philip W. Lowy
School of
Near Eastern and
Judaic Studies

Benjamin S. Hornstein
Program in Jewish
Communal Service
617-736-2990

Waltham Massachusetts
02254-9110

February 26, 1990

Henry Zucker
Mandel Commission on Jewish Education
4500 Euclid Ave.
Cleveland, OH 44103

Dear Hank,

I want to share with you, one of the deans of our field, what I think is an example of good community organization practice. I also send this material to you because it seems so in tune with some of the priorities that I understand are important to the National Commission on Jewish Education.

What I have enclosed is a mailing that we sent out this past week to all rabbis and presidents of synagogues in Massachusetts. The mailing describes a one-day institute for professional and lay leaders of synagogues which seeks to help the synagogue leaders create an environment in their synagogues which would be particularly responsive to young Jewish families. We got involved in this project largely in response to a request from CJP to help create a better working relationship between the federation and area synagogues.

The difficulty the federation was encountering in their initiatives in this regard was the distrust built up over years of minimal or negative interaction between the federation and synagogue systems.

What I believe is impressive is the success we have achieved -- after much hard community-organizing efforts -- to bring together the team of "co-sponsoring agencies" and "cooperating agencies" for what promises to be a very exciting and, we believe important, collaborative initiative. This Institute is not meant to be an end unto itself, but an important first step in helping this community move forward in directions which all of us are in accord are important for Jewish continuity.

I would be pleased to have any comments from you. I guess we all continue to like to have recognition for our work.

Warm regards.

Sincerely,

A handwritten signature in cursive script that reads "Bernie".

Bernard Reisman, Director
Hornstein Program



Brandeis University

Philip W. Lown
School of
Near Eastern and
Judaic Studies

Benjamin S. Hornstein
Program in Jewish
Communal Service
617-736-2990

Waltham Massachusetts
02254-9110

February 1990

TO: Congregational Rabbis, Educators, Presidents and
Vice Presidents

FROM: Bernard Reisman, Director, Hornstein Program In
Jewish Communal Service
Gerald Showstack, Faculty Coordinator, Hornstein Program
Continuing Education Institutes
Irving Belansky, President, New England Council,
Union of American Hebrew Congregations
Paul Menitoff, Regional Director, New England Council,
Union of American Hebrew Congregations

We are pleased to invite you to a seminar on "ENVISIONING THE
CONGREGATION OF THE NEAR FUTURE" on June 10, 1990.

Even the most successful congregation experiences some
uncertainty about the future. Can we be responsive to
changing needs? Do we understand why change can be so
difficult?

Even in the best of organizations, it is sometimes
difficult for lay leaders and congregational
professionals to work together. That may be one factor
which increases the difficulty of planning for the
future.

Are we stuck in the ways we think about what a
congregation is? From where will the new visions of
congregational life emerge?

The seminar which will address these issues is offered by the
Hornstein Program in Jewish Communal Service at Brandeis
University, in collaboration with the Union of American Hebrew
Congregations Northeast Council, the United Synagogue of America
New England Region, the Synagogue Council of Massachusetts, and
the Combined Jewish Philanthropies of Greater Boston. Also
cooperating in this seminar are the Bureau of Jewish Education
and the Hebrew College. The seminar will take place on the
Brandeis campus on Sunday, June 10, 1990, from 10:00-3:30.

This seminar is intended for participation by synagogue or temple "teams" (not individuals) which should include the rabbi(s), two top-level lay leaders, and the education director of your congregation. Together we will hear presentations from distinguished faculty and also work in a small group format to clarify visions for the future of the congregation and begin to develop means to achieve those ends.

Attached for your information is a fuller description of the seminar and an outline of the afternoon's program.

You may reserve a place for the leadership of your congregation by completing and returning the enclosed registration form to the Hornstein Program at Brandeis by March 19.

We look forward to hearing from you very soon and to seeing you on the Brandeis campus on Sunday, June 10.



Brandeis University
The Benjamin S. Hornstein Program in Jewish Communal Service

"ENVISIONING THE CONGREGATION OF THE NEAR FUTURE"
a seminar for rabbis, lay leaders, and education directors
June 10, 1990

The first part of the seminar focuses on how the synagogue or temple came to be what it is at present. This presentation and small group discussion will unlock our perceptions of congregational life by showing us that it was not always this way and by highlighting choice points and turns along the way.

The small groups in this part of the seminar will be mixed across congregations and will help us get a concrete feel for changes and constancies in congregational life. We will look at key changes, at the reasons for change or lack of change, and at issues we face today.

The second part of the seminar will focus on visions of the synagogue of the near future. The presentation will deal with the changing place of the synagogue or temple in a changing community. It will stress the congregation's ability to meet people's changing needs while upholding a religious mission, and will include evolving notions of education, outreach, and definitions of families and membership.

The small group work in this part of the seminar will be organized along congregational lines and will provide an opportunity for these congregational teams to begin envisioning their own future and to start planning for it.

- 10:00 Welcome and Introduction of Participants
- 10:15 "The American Synagogue: How It Achieved
Its Present Form"
Prof. Jonathan Sarna
- 11:15 "The Congregation of Our Past and the Issues
of Today: Change and Constancy"
small group format
- 12:00 Lite working lunch (Kosher)
- 1:00 "Envisioning the Congregation of the Future"
Prof. Joseph Reimer
- 2:00 "Reflecting on Our Future as a Congregation"
congregational team format
- 2:45 Summing Up and Final Thoughts

Please reserve a place for a "team" from our congregation at the June 10 seminar on "Envisioning the Congregation of the Near Future."

Name of
Temple or Synagogue: _____

Address: _____

Telephone: _____

Participants: _____

Rabbi(s): _____

President: _____

Education Director: _____

Other top lay leader: _____

____ Enclosed is a registration fee of \$15.00 per participant (which will cover the cost of lunch), made payable to Brandeis University. The remainder of the costs for the seminar is borne by the sponsoring agencies and a grant from the George and Beatrice Sherman Family Charitable Trust.

Please return this form BY MARCH 19 to:

Professor Gerald Showstack
The Hornstein Program
Brandeis University
PO Box 9110
Waltham, MA 02254-9110



PREMIER INDUSTRIAL FOUNDATION

4500 Euclid Avenue
Cleveland, Ohio 44103
(216) 391-8300

file Community - Boston
XPS

March 5, 1990

Mr. Bernard Reisman
Director
Hornstein Program
Brandeis University
Waltham, MA 02254-9110

Dear Bernie:

Thanks for sending me a copy of your mailing to congregations with reference to the seminar on "Envisioning the Congregation of the Near Future." The seminar is very timely, and I hope will serve as an example to others who are engaged in planning for changes in congregational life. It certainly is a subject that should be high on the priority list for federations.

We are all concerned about Jewish continuity, and we will need to find new methods of cooperation between congregations and the total community. This is surely true in planning for a better day for Jewish education. One of the hopeful signs is that some of the younger rabbis and some of the newer federation executives are open to thinking about changes in federation-congregation relationships.

I hope that your seminar will come up with some good material and that what you are attempting can be replicated around the country.

I'd be pleased to have a copy of the papers which are presented at the seminar and later your evaluation of what happened there.

Cordially,

Henry L. Zucker



COMMISSION ON JEWISH CONTINUITY

SHA'ARIM / GATEWAYS TO JEWISH LIVING
The Jewish Family Educator Initiative



March 1993

IRVING BELANSKY AND MARK GOLDWEITZ, CHAIRS
MICHAEL BOHNEN, CHAIR, SERVICE DELIVERY COMMITTEE
ANDY EISENBERG, CHAIR, PERSONNEL COMMITTEE

Rabbi Barbara Penzner, Staff Director

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PREAMBLE

The Commission on Jewish Continuity recommends a number of projects in a variety of settings to ensure the existence of a committed Jewish community for the 21st century. Now, after an extensive process to consider these complex issues, in the spring of 1993, over three years since its inception, the Commission is prepared to implement its first recommendation. Additional recommendations that address the needs of different age populations, different segments of the community and the potential of different approaches to Jewish education will be reported on and implemented in the future. The hard work and good faith of many individuals in this community, representing a broad coalition of interests, is part and parcel of these proposals, and should be acknowledged by all who read this.

This first recommendation, Sha'arim/Gateways to Jewish Living—The Jewish Family Educator Initiative, will be one vehicle of the Continuity agenda whose purpose is to make a significant impact on the lives of diverse Jewish families who enter the major gateways to the Jewish community. The initiative aims to transform the Jewish lives of those families, whether they enter through JCCs, day schools or, most importantly, congregations.

The term “family education” has been used to refer to a wide variety of activities with various goals. Among them, family education has been designed as:

- a. an instrument for dealing with intake of new members and families
- b. a set of educational processes which work with family groups as opposed to individuals
- c. a way of demonstrating how Jewish observances can enrich family functioning
- d. a context for adult Jewish learning
- e. a means of working with adults and their teenage and young children to prepare them for future roles in Jewish families.

The Commission on Jewish Continuity has not sought to determine which particular function(s) family education ought to serve, either in the community or in any given setting. Likewise, the course of study for training Jewish family educators has yet to set priorities among these various functions. Instead, the Commission, seeking to foster both the creative development of the field and to enhance the individual needs of the participating institutions, leaves these questions open at this time. It is our hope that, over the course of the initiative, the community will see for itself the benefits and strengths of family education and trained family educators.

The three documents which follow present the details of a complex network of relationships among CJP, its agencies, the congregations, centers and day schools participating in the initiative and the individuals who serve as Jewish family educators in our community. A bold and experimental initiative such as this requires forethought and planning, yet it will be subject to the unique characteristics of the participating individuals and the institutions as they enter into the process. As such, it is apparent that there are questions yet unanswered and consequences unanticipated. Through the feedback of the built-in evaluation process as well

as ongoing experimentation on all levels, the initiative will likely undergo modifications in some of its procedures during the initial years. This community, however, is at a high level of readiness and anticipation of this initiative, and, therefore, these proposals are being presented as a "best effort" — a "first step" toward the realization of this dream. The Jewish Family Educator Initiative will be most visible through two major projects. Beginning in the fall of 1993, a Jewish family educator will join the educational team of a few institutions in the community. Ultimately, Reform, Conservative, Orthodox and unaffiliated congregations, JCCs and Jewish day schools will participate in the project. In subsequent years, additional institutions will enter into the program causing a ripple effect in the Jewish community, as excitement for this project builds and as the transformations it engenders change the lives of individuals and families, as well as the institutions themselves. The family educator will be involved in a process of addressing the educational needs of the families in that institution, working closely with the rabbi, educator, lay leaders and other staff of the educational team. In addition, each institution will have the benefit of outside consultation to assist in preparing for the changes that this new professional will undoubtedly stimulate.

At the same time, beginning in the fall of 1993, individuals who are engaged by the participating institutions and others who wish to pursue a career in Jewish family education will commit to a course of study leading to the first-ever certificates in the field of Jewish family education. This project's impact also cannot be underestimated. Beyond the creation of an entirely new field of study in Jewish education, the project will be attracting a new cadre of committed Jews to a new professional career in Jewish education. While the community will require that individuals who complete the course of study will obligate themselves to remain in the Boston area for a number of years in return for their funded education, it is likely that others will eventually migrate to Boston in order to participate in the program and to enrich Jewish education in other North American communities. In addition, this course of study can provide rabbis, educators and teachers with a cutting-edge approach to Jewish education for their home congregations and communities.

Finally, this entire initiative will be involved, from day one, in a comprehensive evaluation process which will explore the impact of family education on the Boston Jewish community, as well as assess the overall initiative itself. This information will be fed back to participating institutions in order to help them succeed. The results will be publicized both locally and nationally.

GOALS OF FAMILY EDUCATION

The following statement, taken from the Report of the Personnel Committee, represents the community's broad goals for the family educator. Although each institution is expected to develop its own individual goals, objectives and strategies for achieving them as part of the application process, they should draw on these communal objectives as a foundation.

- I. Involve family members¹ in their children's Jewish education
 - A. to support and enhance each child's Jewish educational experience.
- II. Establish contexts for family members' Jewish learning
 - A. to make Judaism accessible for family members
 - B. to make the synagogue, center or school a comfortable place for family members
 - C. to provide family members with safe but challenging adult learning opportunities
 - D. to empower family members to become Jewish models and teachers for their children.
- III. Establish programs for joint family involvement in Jewish learning
 - A. to provide families "quality time" together in Jewish pursuits
 - B. to create Jewish memories for families
 - C. to provide a range of experiences so families can make informed choices for themselves.
- IV. Build community among families
 - A. to strengthen the community of families and their connection to the synagogue, center or school, and each other.
- V. Adapt Jewish learning to the home
 - A. to transform homes into vibrant Jewish centers of practice and learning.

¹ "Family members" can include parents, step-parents, grandparents and other significant adult role models in the child's domestic life. In contrast, "families" may also include siblings.

FAMILY EDUCATOR JOB DESCRIPTION

The following is a description of the duties expected of family educators in congregations, centers or schools, based upon discussions by the Personnel Committee and comments received from members of the Service Delivery Committee. This job description, like the goals, is intended to serve as a model for all institutions, but it is specifically designed to recognize the individuality of different institutions. The Committee strongly urges the Commission to require institutions that will receive funding under this initiative to accept this job description, adapting it to their own particular situation. (From the Report of the Personnel Committee)

I. Administrative Functions

- A. Depending upon the particular institution, either directly conduct or participate in the process of conducting intake interviews with new families in order to
 - 1. learn the needs, backgrounds and structures of each family in order to plan programs, inform staff of needs and develop a plan for each family's education and
 - 2. inform the families of the institution's expectations of them and their participation.
- B. Oversee details of implementing family education programs.
- C. Promote programs.
- D. Depending upon the particular institution, hire and assign, or participate in the hiring and assigning of, family education staff in coordination with the educational director.
- E. Supervise and train family education staff.
- F. Coordinate family education programs with other programs.
- G. Communicate regularly with other staff.
- H. Participate as appropriate in communally-sponsored professional development programs, including program evaluation, in-service training and networking.²
- I. Consult with educational director and rabbi around counseling needs (religious and personal) of families.

II. Program Functions

- A. Develop programs for a broad spectrum of age groups.
- B. Communicate and follow up regularly with families to engage their interest and respond to their needs and perceptions.
- C. Obtain, prepare and provide appropriate materials for programs.
- D. Conduct some, or all, family education programs.
- E. Evaluate programs on a regular basis.

² Some congregations might choose to add: "It is desirable for the family educator to participate in the communal life of the congregation."

AN OVERVIEW OF THE INITIATIVE

The Jewish Family Educator Initiative represents a ground-breaking effort in communal collaboration and federation/congregation partnership. Plans for the various elements of the initiative aim to draw on the strengths of the many resources available in the Greater Boston Jewish community. They also require a collaborative partnership among the various agencies and participating institutions, which will be overseen by the Commission on Jewish Continuity.

While some of the governance and allocations issues have yet to be delineated and will depend to some degree on the results of the first year's project, the following outline explains the interactions as they have been developed thus far.

I. Readiness

A. Consultation

In order to assist the institution's team in preparing for and implementing the initiative, the community will provide a consultant whose primary contact will be with the institutional team. Once the family educator is brought on board, s/he joins the team but is not personally accountable to the consultant. The consultant serves the institution.

B. Application, Selection and Monitoring

Each team will develop a proposal which will be considered by the Family Educator Committee, staffed by the Director of the Commission on Jewish Continuity. That committee will interact with the team on a regular basis, first during the selection process and in ensuing years to monitor compliance with the basic obligations (i.e., meeting the funding needs, participating in and successfully completing the course of study, and engaging in the basic evaluation process).

II. Course of Study (Training)

A. Director/Advisor

As part of his/her course of study, each family educator will work with an academic advisor assigned by the program to discuss issues of personal and professional growth. This relationship does not preclude any mentor relationships which may develop with a professional in the institution in which s/he works.

B. Internal Supervisor

Each participating institution will designate its own supervisor for the family educator, and to whom the family educator will be directly responsible. It would be helpful for this supervisor to maintain contact with the assigned director/advisor.

III. Evaluation

A. Professional Support Network

Beginning with the preparation years and continuing after completion of the course of study, a professional support network of Jewish family educators will convene to share programs and problems, review and develop programs, resources, etc.

B. Level I - Providing Data

All participating institutions will work with a liaison to the evaluation process to provide both baseline and ongoing data as requested. This will be the primary responsibility of one designated individual on each institutional team, with the assistance of the family educator.

C. Levels II and III - Self-Evaluation

Interested institutions will designate one individual on the team, who is not the family educator, to acquire expertise in evaluation in order to carry on an intensive self-evaluation. This person will interact with a staff liaison to the Evaluation Process.

IV. Interaction of the Communal Partners

The institutional consultant, study program director/advisor, evaluation staff liaison and institutional supervisor should maintain contact with one another and the Staff Director of the Commission on Jewish Continuity. This communal group may meet at regular intervals to ensure the smooth interaction of the various stakeholders, as well as to respond to challenges as they arise.



REPORT ON INSTITUTIONAL READINESS

February 1993

The Working Group on Institutional Readiness met four times between January 14 and February 11, 1993 to facilitate the Service Delivery Committee's long-term goal of "assisting as many institutions as possible to participate in the Family Educator initiative over time." This report is a summary of the Working Group's deliberations.

DEFINING INSTITUTIONAL READINESS

Institutions which should consider pursuing the application process should have reached a level of institutional development, which include some of the following indicators:

Experience in . . .

- team planning
- creative programming
- family education programming and
- parental involvement in program planning.

Before outlining a procedure for helping institutions develop readiness, it is helpful to spell out what we mean by the term. The discussions in the Service Delivery and Personnel Committees have resulted in a fairly detailed list of readiness criteria, falling into two categories:

1. readiness to accept the obligations that come with participation in the communal process and
2. readiness to relate to the goals and process of family education.

The deliberations and recommendations of the Working Group on Institutional Readiness carefully reflect a balance between these two important criteria, as outlined in this report.

INSTITUTIONAL TEAMS

The committee feels strongly that each participating institution must utilize a team approach in order to most effectively prepare for readiness. The team should include both lay and professional leaders, to be selected by the institution.

THE FAMILY EDUCATOR CONSULTANTS

All institutions will be expected to use a consultant whose role will be as coach in the readiness process.

The consultant's essential function is as enabler, helping the institutional team understand, prepare for, implement and eventually manage the Family Educator Initiative internally. The role of the consultant is to coach applying institutions toward success. The two main areas requiring the consultant's attention are institutional self-assessment and preparation for engaging a family educator.

The consultant assists the institution in preparing for, and completing, the application but will not be involved in the selection or evaluation process. While the primary consultant for the initial phase of the Family Educator Initiative will be the Family Education Coordinator at the BJE, the congregational movements may also select a consultant. It is understood that all consultants will have a close working relationship with the Staff Director of the Commission on Jewish Continuity or its successor (herein referred to as the Commission). The consultant's fees will be covered by CJP with a cap on the consultant's hours and/or fees for any one institution.

Because of the relationship which is developed between the consultant and the institutional team, it is recommended that the same individual who consults in the preliminary phase continue with the institution once a family educator has been engaged. During the first year of this process, the Commission will review the consultation process and develop an implementation plan for Year II, keeping in mind the additional work load of assisting several institutions in their first year of implementation while taking on a second group of institutions beginning a new preliminary phase.

The consultant's responsibilities are as follows:

A. Preliminary Phase

1. Create an atmosphere of readiness by helping the institution consider the many aspects of self-assessment and organizational structure.
2. Help the institution prepare for engaging a family educator.
3. Assist the institutional team in preparing a successful proposal, which will include:
 - a. developing a set of goals and objectives for the educational plan in the institution, mapped out in stages and with priorities
 - b. a plan describing how the family educator and his/her programs would be integrated into the overall structure, for coordinating professional responsibilities and addressing overlap and for supervision of the new personnel
 - c. existence of a clear and agreed upon structure including professionals and lay leaders who will oversee the educational plan, as well as projected continuity of professional leadership
 - d. a financial commitment for meeting the personnel and programming needs entailed in connection with this new position
 - e. a refined job description, based on Commission recommendations, to meet the institution's needs.

B. Year I of Implementation

1. Assist the team to engage in self-reflection as to the Initiative's progress in relation to its goals.
2. Serve as trouble-shooter, as needed, to help respond to changes that take place within the institution.

During the implementation phase, the Staff Director of the Commission will facilitate communication among teams of participating institutions.

THE FAMILY EDUCATOR COMMITTEE

The funding process will involve a Family Educator Committee, staffed by the Staff Director of the Commission. Institutional teams will submit applications to the Family Educator Committee. The Committee will review all applications and invite representatives from each institutional team to meet with them for clarification and questions. In addition to the five items listed above to be included in the institution's proposal, the application will provide a place for the name of the consultant and for the amount planned for salary and benefits for the family educator. All institutions which are funded agree to participate in the community's evaluation, training and networking programs.

The Family Educator Committee will be comprised of 6 individuals chosen by the congregational movements, 6 individuals chosen by CJP and its agencies and one lay chair. The chair will be chosen by the chairs of the Commission, in consultation with the Commission Staff Director and the Synagogue Council and the congregational movements. Members (lay and/or professional) of the Family Educator Committee shall be appointed as follows:

- 2 selected by UAHC
- 2 selected by USCJ
- 1 selected by the Orthodox community
- 1 selected by the Day School Council
- 1 selected by JCCGB
- 1 selected by Hebrew College
- 1 selected by BJE
- 1 selected by the Hornstein Program at Brandeis University
- 2 selected by CJP, at least one of whom will be from the Jewish Education Subcommittee

A RESOURCED DISTRIBUTION PROCESS

After reviewing applications, meeting with the institutional teams and considering the above guidelines, the Family Educator Committee determines those institutions to be funded. Institutions which are not funded should receive clear explanations of the Committee's evaluative comments on their proposals.

Funded institutions will receive a minimum of 50% of the amount planned for salary and benefits for a family educator. If there are additional funds, the Family Educator Committee will distribute the remaining balance

to the funded institutions, up to a maximum of 70% of the amount planned for salary and benefits for a family educator.

The Family Educator Committee will be empowered to establish criteria for distributing funds above 50%. Part-time positions will be considered for funding, with a half-time family educator as a minimum requirement. No institution shall receive more than \$25,000 annually for a full-time position (based on 70% of a \$35,000 package) or \$12,500 for a half-time position (70% of a \$17,500 package). Should it be necessary, CJP's share of the funding may be reduced in years II and III, but by no more than 10% in any one year.

In subsequent years (beyond year III), the Commission will make every attempt to continue financial support, with a floor of no less than 25% of the total salary and compensation package. Beginning with year IV, if reductions are necessary, these reductions will not exceed 10% per year until the floor of 25% is reached.

Members of the Working Group on Institutional Readiness include: Martha Aft (BJE); Sue Anne Endelman (JCCGB); Dr. Trudy Karger (USCJ/Conservative movement); Rabbi Daniel Liben (USCJ/Conservative movement); Dr. Barry Mesch (Hebrew College); Bini Silver (UAHC/Reform movement); Audrey Wilson (UAHC/Reform movement); Alan Teperow (Synagogue Council of Mass.) and Dr. Bernard Reisman (Brandeis University/Hornstein program), co-chairs; Rabbi Barbara Penzner, staff coordinator.



HEBREW COLLEGE
JEWISH FAMILY EDUCATOR TRAINING PROGRAM

PROPOSED CURRICULUM

I. INTRODUCTION

Jewish Family Education is a new and emerging field in Jewish education. Enormous excitement has been generated in the Jewish community over this new dimension of educational programming in synagogues, schools and other institutional structures. The enthusiasm with which family education programs have been greeted, despite the many issues of definition, scope, long-term effectiveness, etc. which remain to be considered as this new field takes shape, is an indicator of the high hopes and expectations that many have for these efforts. The feeling is widespread that Jewish families need to be restored to a central role in engendering the competencies, values and behaviors which are at the center of Jewish identity. Along with that feeling comes the sense that Jewish families of today are less well equipped to serve this function than at any earlier period of Jewish life, because of a lack of Jewish knowledge and experience and a concurrent feeling of inadequacy and lack of authenticity. While programs of very different kinds are embraced by the term "Jewish family education," they share in common the objective of providing Jewish families with expanded competence in areas of Jewish family observance, enhancing their Jewish learning and creating enthusiasm for the enrichment of family life with Jewish ritual and content. Jewish family education programs will ideally give to participating Jewish families a sense of competence and empowerment in transmitting Jewish life and commitment from one generation to the next.

Jewish family education is not a panacea. It is important to keep this in mind as resources are allocated for this important new field. Jewish family education does not and will not replace other forms of intensive and extensive Jewish education. One of the principal objectives of Jewish family education and a criterion for its evaluation may, in fact, be the extent to which it leads adults and young people to increased participation in other and more intensive Jewish educational and communal experiences. Considerations of this kind need to be kept in mind as one enters into the training of Jewish family educators, the structuring of these programs in existing institutions and the evaluation of these programs in terms of long-term impact and cost-effectiveness.

In view of the nascent state of the field, the construction of a training program for Jewish family educators takes on an added measure of complexity. Ideally, products of a training program in the field should have a profound understanding of family systems and interactions, skills in interpersonal and organizational relationships, a thorough knowledge of relevant curricular materials and, of course, a mastery of Jewish tradition, particularly as it relates to family concerns. In addition, Jewish family educators should be educational innovators, contributing to the expansion of experience in the field and playing a role in defining its parameters and contours. The program proposed here attempts to provide Jewish family educator trainees with expertise in these areas, which fall into three fundamental components of the program: Judaica, skills development and practicum.

The bias of the program is toward creating an integrated set of courses which deal with the subject matter from the unique perspective of family education. All students will be expected to participate in each of the three

components. In some extraordinary cases, an exemption or substitution might be permitted by the director, but the intention of the curriculum as it is designed is both to create a new field which does not exist in any other training program and to develop a "community of scholars" who come together to clarify issues in the field as they emerge. All students, regardless of their education or background, can thus benefit from this new program. In addition, all participants will be considered resources in this program, and the seminar style of the courses will allow for sharing of expertise. The proposed curriculum is in itself an experiment and will need to be constantly refined and re-examined in the light of the experience of its graduates.

This curricular proposal is informed by the input of several individuals and entities, some of which have been working in the context of the Commission on Jewish Continuity of Greater Boston, a collaborative effort of Combined Jewish Philanthropies, the Synagogue Council of Massachusetts and the congregational movements. The Personnel Committee, chaired by Andrew Eisenberg, produced an important report and job description for the family educator, drawing on the deliberations of the Personnel Subcommittee and the Service Delivery Committee. Relevant portions of the Proposed Plan for Evaluation and Research, prepared by Professor Susan Shevitz, and of the draft prepared for the Institutional Readiness Committee by Professor Sherry Israel are also reflected in this proposal.

This proposal benefits from the input of two other significant documents: the draft proposal prepared by Professor Joseph Reimer of Brandeis University, "Proposed Plan for Training of Family Educators," and the draft proposal submitted to the Academic Senate by Gail Dorph, Director of the Fingerhut School of Education of the University of Judaism, regarding a certificate of advanced graduate studies in Jewish Family Education. A proposal entitled "Hebrew College Family Educator Training Program" submitted in February 1992 by Marjorie Berkowitz, as well as a memorandum entitled "Training Jewish Family Educators: A Proposal" by the late Dr. Samuel Schafler were also very helpful in the preparation of this proposal, as were extensive consultations with other practitioners and academics in the field of family education generally and Jewish family education in particular.

II. THE PROGRAM

Hebrew College proposes two credential programs in Jewish Family Education:

1. a certificate for educators who wish to pursue a program while working in the field and
2. a Master's Degree program with a specialization in Jewish Family Education for those beginning graduate level training for a career in Jewish Education.

This Hebrew College program will be offered in cooperation with the Hornstein School of Jewish Communal Service at Brandeis University and will draw on the faculty resources of Brandeis, Wheelock and other schools in the area, as well as Hebrew College faculty. The program will be administered by a director who will report to the provost of Hebrew College. It is proposed that a standing joint academic/community advisory committee work with the director of the program and serve as a liaison between congregations, centers and day schools participating in the funding program of the Commission on Jewish Continuity, the congregational movements and other community entities monitoring and evaluating the progress of the program and the participating individuals.

III. THE COURSE OF STUDY

A. Two Courses of Study

1. *The Certificate Program*

This program is designed for practitioners in the field who may enter with the background outlined below, or its equivalent, or may accumulate credits concurrently with the Family Educator program of study.

2. *Master's in Jewish Education (MJEd.) with a Specialization in Jewish Family Education*

Those wishing to earn the Master's degree will complete the requirements outlined for the Certificate in Jewish Family Education. Master's students will also be required to complete a minimum of 12 credits in graduate level courses in Judaica and demonstrate fluency in Hebrew.

B. Admissions

1. *Pre- or Co-requisites*

- a. Bachelor's degree from an accredited institution
- b. Master's degree or equivalent relevant experience in Jewish education, to be determined by the director
- c. Twelve credits or the equivalent in college-level Jewish studies, exclusive of Hebrew language
- d. One year or the equivalent of college-level Hebrew

2. *Admissions Procedures*

a. Individuals in funded positions

Individuals who apply to serve in a funded position will apply to the training program either prior to or simultaneously with applying for a position. Individuals who are currently serving in institutions which will receive communal funds will be engaged on condition of meeting the prerequisites of the training program. Candidates from funded institutions who meet the prerequisites set forth in advance may enter the training program without further screening by the Hebrew College. In cases where the candidate's background does not clearly meet the prerequisites or where "equivalent experience" is subject to different interpretations, the funded institution should consult with the program director prior to committing to engage that individual.

b. Individuals in positions not funded by the community

Candidates who apply to the program who are not in funded positions will participate in a screening process, including demonstration of prerequisite training and/or experience and a personal interview with the Hebrew College admissions committee. Admission of individuals who apply without any institutional connection at all will be further assisted by the program's academic/community advisory committee.

C. Components of the Study Program

1. *Week-long Summer Seminar*

Participants will be expected to participate in a week-long seminar/retreat (at Camp Yavneh) to explore the nature of the field, the range of program possibilities, problems of definition, their role as practitioners and "experimenters" and to engage in "group-building" activities.

2. *Core Program*

a. Coursework

The objective of the study program is to provide the Jewish family educator with the tools and knowledge to work with and to adapt to changing objectives in each setting and each family. The core program will consist of four semesters over a two-year period. Two related courses plus a seminar will be taught each semester. Coursework will take place one morning a week, including one course focusing on methodological concerns and the other on Judaica, each developed from the unique perspective of family education. Some provision for elective courses, particularly in the Judaica component, may be arranged. The coursework will be designed as a rolling curriculum so that new students may enter the two-year program on an annual basis, beginning in either Year I or II of the program.

b. The seminar

The seminar will concentrate on participants' experiences in the field. Programs which participants are administering will be presented and analyzed. The process through which these programs were developed will be examined with particular attention to how the necessary human and financial resources were located and how "blockages" were dealt with and overcome. One focus of the seminars will be the enhancement of participants' relevant human relations skills. Issues of needs assessment will be considered. Seminar leaders will include human relations specialists including psychologists, group dynamics experts, and social workers who will be available to participants for individual consultation and guidance to supplement the work of the seminar.

3. *Course Descriptions*

a. Semester I

(1) Human Development – a life-span approach to human development in infancy, childhood, young adulthood, maturity and old age

(2) Periodization of Jewish History – historical epochs, principal literary and cultural monuments; what we know of the history of Jewish family life

(3) Seminar 1

b. Semester II

(1) How Families Work – family dynamics, family systems theory, family ecology, intergenerational transmission of values, changing families and identities, theory of how to be effective change agents, functionality and dysfunctionality, intimacy, sexuality, human development from birth to death

(2) The Structure of American Jewish Life – principal issues on the Jewish public agenda including intermarriage and its ramifications for the Jewish family educator, community and family issues, organizational and institutional relationships to families

(3) Seminar 2

c. Semester III

(1) Curriculum in Jewish Family Education: Theory and Practice – an analytical survey of existing programs in Jewish Family Education, curricular theory, developing a Jewish family education curriculum, program evaluation and basic research methods, adult learning theory

(2) The Jewish Life Cycle: Individual and Communal – life-cycle events in the life of the individual and of the family system, the Jewish communal calendar and its relationship to home and family dynamics, faith development

(3) Seminar 3

d. Semester IV

(1) Working with Groups – how groups form and develop, effecting change within institutional structures, interpersonal relationships, working with other professionals and lay individuals, psychology of institutions

(2) The Jewish Family in Literature – sociology and psychology of the American Jewish family through modern American Jewish fiction and contemporary Hebrew literature in translation: how the family operates to express Jewish values in the contemporary world and perceptions of the Jewish family as mirrored in the popular culture

(3) Seminar 4

e. Service requirement

Individuals who serve in funded positions and therefore receive their education tuition-free commit themselves to remaining in and serving the community for a minimum of two years. The family educator's principal obligation for those two years will be to the institution s/he serves. Should that arrangement be terminated, the family educator will either be engaged in another position in the community or be released from his/her obligation. The community advisory board will clarify the family educator's financial commitment to the community should s/he leave the community without fulfilling this commitment.

4. Provisions for Participation of Others in the Community

a. Members of the team of funded institutions

The program will create an opportunity for supervisors of family educators in funded institutions to meet, learn the necessary skills of supervision and develop expertise in supervision. Teams of funded institutions will also be brought together from time to time.

b. Professionals of non-funded institutions

Neither funding nor employment are prerequisites for entry into the program. Certification can be made available on a tuition basis to individuals in the community as well.

IV. ADMINISTRATION AND FACULTY

A. Director

The Director of the Family Educator Program will, ideally, bring academic credentials (preferably in psychology or education), administrative skills and a genuine feel for supervision and advisement. The director's responsibilities will include administration of the program, advising students or overseeing the advisors and serving as program liaison with field placements, and may include teaching in the program, depending on the director's area of specialization.

B. Advisors

Each student will be assigned an academic advisor whose role will be to serve as mentor and guide through the course of the study program, reflecting on and reacting to the individual's own issues of professional and educational growth. While in the first year, the director will most likely serve as advisor; as more individuals enroll in the program the director may suggest other advisors. These individuals should have familiarity with the program and should be selected based on the needs of the individual.

C. Faculty

The study program intends to utilize the best resources that the Boston area has to offer with the aim to upgrade current offerings and create a new vocabulary for this emerging field. In addition to collaboration with the Hornstein Program in Jewish Communal Service at Brandeis, the program will seek out other experts in the field. Should the program involve participation in existing courses outside of Hebrew College, arrangements will be made to minimize travel from one campus to another. Under all circumstances, students will attend classes at one location only on any given day that courses are offered.

V. BUDGET

Individuals participating in the Family Educator Study Program who serve in communally-funded positions will attend the program tuition-free. Tuition for all others will be determined, providing some subsidy for congregations, centers and day schools which do not receive communal funding but wish to enroll professionals on staff.

The following are the projected costs of the program during the first year, 1993-94, based on anticipated enrollment of seven or eight individuals:

Director (1/2 time)	\$ 25,000
Instructional costs: courses	12,000
Retreat and seminars	12,000
Advisors	6,000*
Clerical	10,000
Printing, phone, mail, supplies	3,000
Total:	\$68,000

*In the first year, this may be absorbed into the director's compensation based on the director's advisory load.

The Training Working Group met twice, on February 24 and March 8, 1993. Members of the Working Group are: Dr. David Gordis (Hebrew College), chair; Marjorie Berkowitz (USCJ); Lois Edelstein (UAHC); Sue Anne Endelman (JCCGB); Joyce Juda (USCJ); Carolyn Keller (BJE); Michael Libenson (HC); Lesley Litman (UAHC); Barry Mesch (HC); Ira Schor (JF&CS); Alan Teperow (Synagogue Council); Rabbi Barbara Penzner, Commission staff.

REPORT ON EVALUATION AND RESEARCH

February 1993

OVERVIEW

Our community is about to embark on a bold endeavor which has the potential for changing the way Jewish schools and centers think about and provide education. While Jewish family education is a currently popular innovation, our community is committed to a systematic, systemic, community-wide approach as a way of reaching and inspiring more Jews. Indeed, there is as yet no other federation committed to sharing the cost of synagogue-based Jewish family educators on an ongoing basis with the congregations.

These comments are not meant to be self-congratulatory but rather to emphasize the critical importance to our community and to the rest of the Jewish world of learning from the Continuity Commission's projects. Evaluation and research must be given sufficient attention to help us improve our projects as they progress and to answer serious questions about their effectiveness and impact over time on the involved educators, institutions and families.

With the oversight of the Commission and its successor instrumentalities and the ongoing advice and monitoring of a professional advisory group, the proposed evaluation process relies on the strengths, self-assessment and credibility of the project's stakeholders and participants. It is assumed that the primary goal of the evaluation process described here is to provide information so the project can be improved from within, resulting in the most effective and successful program possible in each institution and in the community overall. It is further assumed that continued funding of the project — or any of its parts — by CJP will rely heavily but not solely on this process.

It is expected that certain agencies/institutions may want to undergo their own objective, outside evaluations both as part of and independent of their role in this project. There are, consequently, several ways described through which the project will be evaluated. As listed below, they progress from the very basic and required to the more complex and voluntary (on the part of the institution):

- observing and reporting how the project is functioning in each institution to determine whether the system, as implemented, is functioning as intended
- conducting evaluations of the projects as they proceed and using resultant information to improve them (formative evaluation)
- empowering institutions to adopt self-reflective evaluation procedures and be comfortable with self-study and outside evaluation

- conducting research about the impact of the family educator/education on institutions and families (though sufficient resources to conduct thorough longitudinal studies over time will in all likelihood not be available)
- evaluating the program in Year V to determine its overall impact and effectiveness as measured against the program goals (summative evaluation)

This proposal provides an interplay among three levels of evaluation and research for the next phase of the Continuity Commission's work. It uses a five-year time frame because it is generally agreed in the literature on educational change that it takes five years for a new program to become part of the involved institutions in a real sense.

All budget estimates are very rough; precise figures will be worked out when there is commitment to particular research and evaluation activities. A summary of the annual and total costs by level and evaluation activity within each level is in Appendix I.

HIGHLIGHTS OF THE PROPOSED PLAN I

- gets basic, overall evaluative information from all involved sites;
- focuses in-depth evaluation on sites prepared to engage in the process;
- develops the capacity of each of these sites to conduct appropriate evaluations by hiring and training practitioners to serve as on-site evaluation coordinators;
- weaves together in-depth evaluation with other research approaches dealing with relevant questions;
- involves a range of practitioner and academic experts in the process;
- attends to ways of "getting the message out" so that what is being achieved through the Family Education initiatives may influence people's understanding of the effectiveness and importance of Jewish education.
- This process is committed to:

accountability to Commission; donors; participants; participating institutions
 flexibility in adopting ways to assess
 objective compliance
 formative results fed back into the "loop"
 summative results.

AGENCY RESPONSIBILITY

It is suggested that the Bureau of Jewish Education be given primary responsibility for research and evaluation for several reasons:

1. Research and evaluation is conceived as closely aligned to in-service training. A significant thrust of this plan is to train practitioners and others to conduct aspects of the evaluations. As the community agency with primary responsibility for in-service training, BJE is an appropriate address for research and evaluation.
2. Educational evaluation ought not be separated from educational services. What is learned about the family education process needs to be fed back into the system. BJE already is actively involved in developing and providing educational resources, supporting and disseminating information to various professional networks and building team-based reflective practice in schools/congregations. BJE will continue to convene and support the family educators professional network for these purposes.
3. BJE has the ability to bring together the academics and practitioners, agencies and synagogues, federation leadership and project implementors; this is a key to the success of the research and evaluation plan.
4. BJE has demonstrable expertise and experience in this area.

The Bureau will engage the research and evaluation consultant(s). Institutions will have input, in consultation with BJE, in selecting the individual evaluator to work with them. That individual will report to BJE.

To ensure that various viewpoints and ideas are factored into the action plan, a Professional Research Advisory Committee of knowledgeable and representative researchers and practitioners will be convened. This committee will be a sounding board and provide advice on technical, methodological and epistemological matters, thereby providing guidance for the project.

This committee should have a minimum of six (6) and a maximum of eight (8) members, in addition to the consultant. Recognizing the need to include both representatives of the synagogue movements and the critical involvement of professionals with educational research expertise, the selection of the Advisory Committee members should be based first on the individuals' professional credentials, with half the Committee comprised of educators/practitioners and the other half researchers.

Together with the Committee and others, the consultant will design an overall evaluation plan based on the three major elements below. The plan should provide for the collection and analysis of basic data on compliance and more sophisticated information on effectiveness and impact. It should be flexible enough in order to address the unique characteristics of each participating institution and professional while intentionally attempting to train and involve the participants in methods of serious self-assessment on several levels.

The plan should state clearly in the application materials and reports that participation in the evaluation process — minimally at Level I — is a requirement for receiving communal funds for the project. The institution's planned involvement should be explicitly described. The plan requires that at least one member of the institution's team must agree to participate in the training program in evaluation methods. Further, in order to provide clear and institution-specific criteria for evaluation, while maintaining the project's communal integrity, the stated goals and objectives unique to each institution, developed during the readiness process, should relate to the overall communal goals for the project. The process should also entail a thorough review of the overall program goals and objectives, probably in Years III and V.

BASIC MONITORING AND EVALUATION OF ALL INVOLVED INSTITUTIONS — LEVEL I

This level is intended to provide for the ongoing monitoring of all involved institutions and to obtain basic information from them which can be used to help improve their projects. The focus is on the implementing institutions and agencies and getting base-line data from the institutions. A set of standardized evaluation questions and descriptive reporting procedures (statistical and qualitative) will be worked out for all participating groups. This level of monitoring and evaluation is based on a set of assumptions, detailed below, which lead to an operational plan.

Assumptions

1. There is the need for ongoing monitoring to ensure that institutions are in compliance with basic criteria and that funds are being used according to program plans by involved institutions.
2. There is the need for ongoing evaluative feedback (formative evaluation) about the project to improve it as it develops. This suggests three approaches:
 - a. getting useful information in a timely manner
 - b. providing helpful information to involved practitioners and policy-makers and
 - c. helping practitioners develop skills in program evaluation so that they will be able to evaluate their own institutions' family education programs in an ongoing and responsible manner.
3. Three aspects of the project warrant separate evaluative processes:
 - a. the training program's effectiveness in training family education specialists
 - b. the impact of the family educators on their institutions' programs and their clientele and
 - c. the effectiveness of key agencies involved in providing the services mandated by the Commission.

Operational Plan

1. Hire a consultant in research and evaluation at BJE to:

- a. consult with staff in the various agencies/schools responsible for implementing the program to design mechanisms and procedures for reporting on funding use, etc. Most of these procedures would be applied to all participating and implementing stakeholder groups; some will be designed flexibly to assess various unique or specific aspects appropriate to a particular institutional setting.
- b. produce a family and congregational profile survey to be used in funded congregations to get base-line data about current practices and attitudes as related to families' involvement in Jewish life (this will serve as the basis for comparative analysis based on data gathered in subsequent years as the project proceeds)
- c. assist staff in the implementing agencies to develop their own mechanisms for assessing their work; assist each institution to draw from the various resources available to it to conduct its own evaluation procedures, including, but not limited to, local academic faculty, regional and national movements, etc.
- d. report to the regional movements and other appropriate groups on what is being learned and help to conduct the deliberations on possible modifications in policy and/or program
- e. convene and staff the Professional Research Advisory Committee.

2. Subvent the cost of four family educators and/or educational directors or their appropriate designees to enroll in a course at the Hornstein Program in Program Evaluation for the Practitioner.

Budget

1. Consultant on Research and Evaluation (1 day/wk)	\$ 11,000
2. Miscellaneous data collection, clerical and reporting costs	2,500
Administrative costs	<u>500</u>
Annual costs	\$ 14,000

Total CJP cost over 5 years (allowing for increases over time) \$117,250

* In Years II and III, time should be increased to 12 hrs/wk.

* In Years IV and V, time should be increased to 16 hrs/wk, with appropriate expansion of other related costs.

3. Tuition subventions for up to 4 practitioners, in 2 separate years
Hornstein subsidy/practitioner: \$1,250 each; \$10,000 over 5 years
CJP subsidy/practitioner: \$1,000 each

Total cost to CJP over 5 years \$ 8,000
(4 practitioners @ \$1,000 each x 2 different courses)

(*N.B. The institution providing the training in evaluation will be expected to cover 50% of the total cost; i.e., the program should be basically tuition-free.)

ONGOING EVALUATION OF SPECIFIED PROGRAMS — LEVEL II

(this assumes that all of the Level I functions are maintained)

It is acknowledged that the proposal for Levels II and III of Evaluation and Research are, to some extent, idealistic and will be modified by the stakeholders and the Advisory Committee as the research and resource issues become clearer. Engaging in some more sophisticated assessments of impact, however, is still considered to be of great importance.)

The objective of this level is to gain descriptive, detailed information about the nature of the projects and their effect on the sponsoring institutions and clientele in order to improve the offerings. Institutions which are most interested in this evaluative/research function will be most heavily involved. This will begin in Year II (1994/95) with 3-4 institutions.

Every effort should be made to get 3-4 sites engaged in the Level II evaluation processes (and beyond) as soon as possible after the first year of the project. However, the applying institutions should understand that their selection for funding is neither contingent upon, nor otherwise affected by, their interest in participating in the evaluation process beyond Level I.

Assumptions

1,2,3 as in Level I, above

4. In-depth knowledge of specific programs will illuminate the strengths and weaknesses of various approaches; this will inform program and policy decisions in those institutions and have ramifications for the work in other settings.
5. Not all institutions will be prepared to engage in ongoing, formative evaluation; it will be best to work on this more intensive basis in sites which are interested in it.
6. The research effort will concentrate solely on those sites' family education programs and their effects on staff, institution and/or clients.
7. Each institution will determine the exact focus of its inquiry from within guidelines established by the Professional Advisory Committee and/or other appropriate groups.
8. Results from the inquiries will be shared with the community, allowing for anonymity, when appropriate.
9. More practitioners and lay leaders from participating institutions will be involved in the evaluation process.

Operational Plan

1. Level II will start in 1994-95.
2. An additional day/week be added to the position of research and evaluation consultant in order to:
 - a. help prepare and select participating sites
 - b. develop "research team" within each institution
 - c. help that team specify evaluation questions and develop a research plan
 - d. prepare cross-site data collection methods
 - e. conduct appropriate seminars, consultations, etc., to support teams' work
 - f. train evaluation specialists (see #2 below)
 - g. analyze and report on findings
 - h. conduct deliberations about the relevant issues.
3. Hire practitioners to serve as evaluation coordinators/specialists so that each involved institution has an individual with responsibility for evaluation tasks within that institution.
4. Develop the institutions' own capacities for in-depth evaluation through individual consultations and interagency seminars. Enable institutions to make use of all available resources, including the synagogue movements, central agencies and "umbrella" groups.
5. Provide an ongoing way for institutions' evaluation teams to meet with each other to share ideas and insights.

Budget

1. Additional day/week for research and evaluation consultant	\$ 11,000
2. Four evaluation specialists (1 at each site at \$5,000 each)	\$ 20,000
3. Miscellaneous costs of data collection, meetings, training, reports, etc. for all four institutions	\$ <u>5,000</u>
Total approximate annual costs Level II	\$ 36,000
Total CJP cost over 5 years (assumes modest increase over time)	\$158,000

RESEARCH AND ANALYSIS OF SELECTED PROGRAMS — LEVEL III

Levels I and II focus on the evaluation of specified projects. The Commission's overall plan, however, raises many important educational questions beyond the purview of "evaluation." These are important research questions ranging from developmental issues (e.g., How do specific types of families change, over time, as they encounter certain types of programs? How do parents and adolescent children think about questions of religious belief?) to issues of institutional change (e.g., How are staff relationships recalibrated when a new full-time professional is hired?) or financing (e.g., the impact of family education on congregations' budgets and fund-raising activities).

The scope and focus of the Continuity Commission's initiatives, however, provide a wonderful opportunity to learn much more about important aspects of Jewish education. Because the changes are community-wide and planned, it is appropriate to conceive of this as an opportunity to conduct significant research projects which relate to the initiatives and build on each other. Level III is designed to foster this sort of learning. In a way, this community could become a "living laboratory" in which a set of interrelated issues could be investigated. This will not only add to the Jewish educational knowledge base but will attract positive attention and, perhaps, outside funding as the research goes forward. It also makes good use of graduate students and academics who are in the area.

Assumptions

1. The scope and focus of the initiatives provide an appropriate setting for multi-site and/or single site studies, comparative studies (with other communities).
2. There are doctoral students and researchers in the Boston area with interests in many of the appropriate "researchable" questions.
3. The Boston experience can provide critical insights into different aspects of Jewish education, family life, institutional change, communal change, etc.
4. The reputation of the Boston Jewish community as a trendsetting community will be enhanced as it stimulates and disseminates important information to the wider Jewish community, locally and nationally.
5. The research will generate a sense of excitement and interest and, in turn, enrich the institutions' efforts.

Operational Plan

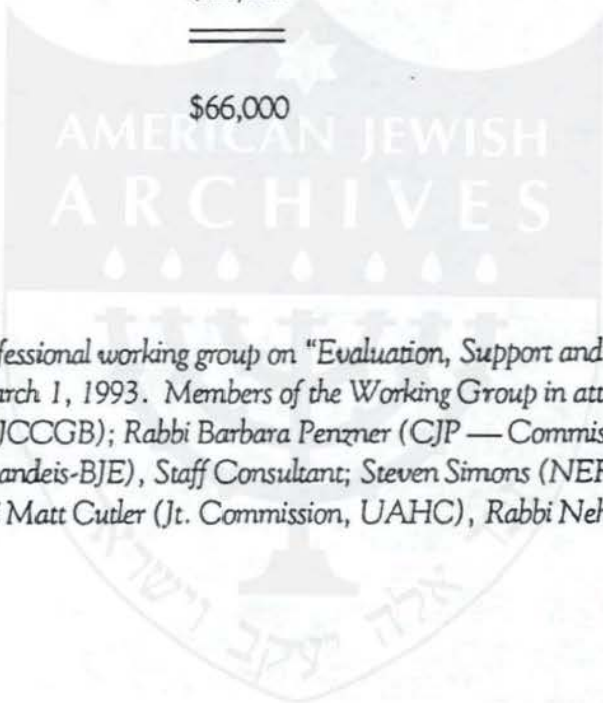
1. Develop an inter-disciplinary research consortium staffed by BJE consultant on research and evaluation. The inter-institutional consortium would also refine questions, provide a forum for developing ideas, collaborating, etc.

ide incentives for conducting research:

lowships for 2 doctoral dissertations
ompetitive grants for research projects.

ide vehicles for disseminating results (through conferences, publications, et al.).

consultant time (absorbed in Level II)	_____
toral grants (\$3,000/year for up to 3 years)	\$18,000
mpetitive grants (\$3,000/year for up to 3 years)	\$48,000
mination activities (conference or publication)	
de funding	\$15,000
	=====
Level III	\$66,000



proposal was reviewed and modified by the professional working group on "Evaluation, Support and Monitoring,"
d by the Bureau of Jewish Education on March 1, 1993. Members of the Working Group in attendance:
riel J. Margolis (BJE), chair; Alan Mann (JCCGB); Rabbi Barbara Penzner (CJP — Commission Staff);
ubin (BARTE); Dr. Susan L. Shevitz (Brandeis-BJE), Staff Consultant; Steven Simons (NER-USCJ);
ene Victor (JEA). Unable to Attend: Rabbi Matt Cutler (Jt. Commission, UAHC), Rabbi Nehemia Polen
nd Alan Teperow (Syn. Council).

EVALUATION AND RESEARCH — APPENDIX

BUDGET SUMMARY (COSTS TO CJP ONLY)

	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Level I						
Research & Evaluation	11,000	17,000	17,500	23,000	23,000	91,500
Consultation						
Data Collection Reporting	2,500	2,500	2,750	3,000	3,500	14,250
Tuition Subventions		4,000	4,000			8,000
Administration	500	500	750	750	1,000	3,500
Subtotal	14,000	24,000	25,000	26,750	27,500	\$117,250
Level II						
Additional Research & Evaluation Consultation		11,000	11,500	12,000	12,500	47,000
On-site Evaluation Specialists		20,000	20,000	27,000	22,000	89,000
Data Collection/ Meetings, Reporting		5,000	5,000	6,000	6,000	21,000
Subtotal		36,000	36,500	45,000	40,500	\$158,000
Level III						
2 Doctoral Grants		6,000	6,000	6,000		18,000
4 Research Grants	3,000	12,000	12,000	12,000	9,000	48,000
Subtotal	3,000	18,000	18,000	18,000	9,000	\$ 66,000
Totals by year	17,000	78,000	79,500	89,750	77,000	\$341,250

Total Levels I, II and III: \$341,250

FAMILY EDUCATOR INITIATIVE

PROPOSED BUDGET FOR YEAR 1: 1993-94 INITIAL PROJECTIONS

I. Institutional Readiness and Funding for On-site Personnel	Minimum	Maximum
Consultants for applying institutions, as needed	10,000	10,000
50-70% contribution for FE salary/benefits, \$25,000 cap per institution		
6 institutions @ average \$20,000 each	120,000	
8 institutions @ average \$20,000 each		160,000
Subtotal	\$130,000	\$170,000
II. Training Program		
Director (half-time)	25,000	25,000
Instructional costs-courses, advisors	30,000	30,000
Administrative expenses	13,000	13,000
Subtotal	\$ 68,000	\$ 68,000
III. Evaluation		
Level I		
Research and evaluation consultant	11,000	11,000
Misc. data collection and recording costs	2,500	2,500
Administration	500	500
Level III		
4 research grants	3,000	3,000
Subtotal	\$ 17,000	\$ 17,000
IV. Commission Staff		
Commission staff upgraded to full-time	30,000	30,000
Total	\$245,000	\$285,000
Commission Budget	30,000	30,000
FE Administration and Evaluation	27,000	27,000
FE Training	68,000	68,000
FE Direct Funding to Institutions	120,000	160,000
Total	\$245,000	\$285,000



COMBINED JEWISH PHILANTHROPIES

O F G R E A T E R B O S T O N

ALAN R. GOLDSTEIN
Chair, Board of Directors
BARRY SHRAGE
President

Phil Shrago

One Lincoln Plaza
Boston, Massachusetts 02111
Telephone:
617 330-9500
Telefax:
617 330-5197

May 21, 1993

Mr. Morton I. Mandel
Premier Industries
4500 Euclid Avenue
Cleveland, Ohio 44103

Dear Mort:

I'm enclosing the "first fruits" of our Jewish Continuity effort in Boston. I've greatly valued your support and your ongoing contact over the last few years and I know that we're all part of a national network with one common goal -- the transformation of our Jewish people.

As you know, creating a true partnership and a careful planning process between a Federation and Congregations is a complex and time consuming task. Finally, after three years of hard work, CJP's flagship initiative -- "Sha'arim/Gateways to Jewish Living: The Jewish Family Educator Initiative" is ready to be launched. We think the results are worth the wait.

While other institutions (primarily JCCs and Day Schools) are eligible for participation in the family educator initiative, the program is aimed primarily at congregations. "Sha'arim" is designed as the first critical, catalytic step in a process aimed at transforming our congregational gateway institutions and the lives of those Jews who pass through them.

While the Commission plan envisions a full-range of "transformational" programs that will ultimately integrate high quality youth group experiences (through training and subsidies for professional youth workers), an educational experience in Israel (through our existing congregationally-based Passport Program, which currently has over 600 youngsters enrolled), and intensive Jewish summer camping for children and teens, we view the Sha'arim Project as the program that must create the environment in the congregation for everything else that will follow. If children can't experience Jewish life in their homes, if their parents aren't role models, if the parents aren't committed to Israel experiences, youth groups and intensive Jewish camping, then all else is bound to fail.



A United Way Agency

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*The
CJP '93
Campaign*

The Sha'arim Initiative contains a number of unique characteristics. As you can see, it places a heavy emphasis on institutional readiness, comprehensive training, and thorough evaluation. Our academic standards, including resources from Boston's Hebrew College and Brandeis University, are of the highest quality and faculty of both institutions have been involved in creating this initiative. But it's also the first large scale effort to suggest that parent education -- the transformation of the minds and hearts of parents as they enter the congregational gateway -- deserves the attention of a full-time trained educator in each of our larger congregations.

In order to accomplish this goal, the initiative provides a CJP incentive of at least half the cost of the educator. At the same time, we're asking institutions to pay about half to assure that that they've given the initiative careful thought and that they're committed to a serious congregation-wide implementation process.

The role of the full-time educator (half-time educators will be allowed for smaller congregations) is also clearly spelled out. The family educator will provide a careful intake interview for every incoming family to help that family create an individualized learning program designed to meet their needs and interests and also to expose them as adults to the texts, history, culture, and religion of the Jewish people. The parent and family educator will then become the teacher/resource/guide/facilitator for each family's educational journey. The initiative envisions congregations that make a serious organized attempt to deeply touch the spiritual lives of every one of their congregants over time.

Through this project, for the first time, a Federation is committing itself to the broad-based, intellectual, and spiritual transformation of a community. This symbolism has important national implications. If Boston, with all its intellectual strength and power, is committing itself to an approach that is intellectually and educationally sophisticated, but is also a synagogue-centered, God-centered approach to Jewish continuity, the results will surely influence the entire American Jewish community.

Mr. Morton I. Mandel

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May 21, 1993

I think you'll find that the enclosed report presents a fairly comprehensive model of federation/synagogue cooperation, careful training, and evaluation. Most importantly, however, is the underlying idea that we will move as quickly as possible to provide an intensive, transformational, parent and family education experience for every member of our community entering a congregational gateway.

Our Commission on Jewish Continuity is a true "wall-to-wall" coalition. It represents all of our community's congregations, congregational movements, and community institutions, including representation from the Northeast Council of the Union of American Hebrew Congregations, the New England Region of the United Synagogue of Conservative Judaism, and the Orthodox community. Jewish educators have also been involved directly through the Jewish Educators Assembly (the formal organization of Conservative Movement school principals) and BARTE (Boston Area Reform Temple Educators). Twelve congregational rabbis are also directly involved as members of the Commission. The Commission includes the presidents and executives of the Jewish Community Center of Greater Boston, the Hebrew College, and the Bureau of Jewish Education, as well as key CJP planning and campaign leadership.

A joint CJP/Congregational Steering Committee of twenty members helps shape the process and the Community Advisory Board consisting of thirty major contributors and key foundations is actively working under the chairmanship of George Krupp to develop the foundation resources needed to support the recommendations of the Commission.

The Commission is co-chaired by CJP leader Mark Goldweitz and by Irving Belansky, former President of the Synagogue Council and currently President of the Northeast Council of the Union of American Hebrew Congregations. The work of the Commission has been supported by a professional working three days per week. She is leaving to become a Jerusalem Fellow, but her successor will continue full-time through the implementation phase.

Other initiatives will be emerging over the next six months, including an initiative aimed at putting a trained youth worker in every congregation. We already have our Passport Program in place which provides an opportunity

Mr. Morton I. Mandel

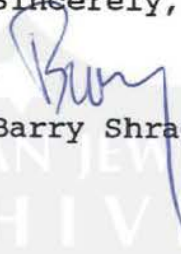
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May 21, 1993

for every youngster to go to Israel through the congregational gateway at age fifteen or sixteen.

Thanks for this opportunity to write and I look forward to hearing from you and discussing this initiative further. Warm regards to all my friends in Cleveland.

Sincerely,


Barry Shrage

BS:mm



MORTON L. MANDEL

4500 EUCLID AVENUE • CLEVELAND, OHIO 44103

VFL

June 23, 1993

Dear Barry:

Many thanks for your letter of May 21, and the enclosed report. It was a pleasure to see this report come out, and I look forward to reading it carefully.

You are at the leading edge of developing the appropriate kind of relationships within a community that includes federation and congregations. We can all learn from the work you are doing in Boston.

It's important to me that we stay in touch. Boston is a wonderful community, and you have been giving it inspired leadership in the whole area of Jewish continuity. I know we will find many ways to work together in the years ahead.

Warmest personal regards.

Sincerely,

MORTON L. MANDEL

Mr. Barry Shrage
President
Combined Jewish Philanthropies
of Greater Boston
One Lincoln Plaza
Boston, MA 02111