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**AMERICAN JEWISH ARCHIVES**

**MS-831: Jack, Joseph and Morton Mandel Foundation Records, 1980–2008.**  
Series B: Commission on Jewish Education in North America (CJENA). 1980–1993.  
Subseries 3: General Files, 1980–1993.

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Box  
11

Folder  
3

Implementation Initiative ("ii"), 1989.

For more information on this collection, please see the finding aid on the  
American Jewish Archives website.

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TO: The Planning Committee  
NAME  
DEPARTMENT/PLANT LOCATION

FROM: Joe Reimer  
NAME  
DEPARTMENT/PLANT LOCATION

DATE: 2/10/89  
REPLYING TO  
YOUR MEMO OF: \_\_\_\_\_

SUBJECT: The "II" Initiative

I have worked with Seymour for almost 20 years and believe that he can accomplish almost any educational initiative that he believes in. The addition of Annette to his team only strengthens my confidence.

However, I remain unconvinced of the prospects of the "II" Initiative achieving the goals in the announced time frame for several reasons. I'll elaborate below.

My main objective now, though, is to have us immediately consider 3 questions while we continue to weigh the fate of this initiative:

1. If our future consultations with wise men, advisory board and commissioners lead to many hesitations, do we have an alternative plan for the June meeting and beyond?
2. Could Seymour and Annette put in written form not only their leading assumptions and plans for the initiative, but also their responses to the questions raised by us in these discussions?
3. Could we come to some preliminary agreement as to whether we want to invest major intellectual effort in writing a report (or background papers to a report) or whether we see a report as primarily "verbiage" or "rhetoric" to be fashioned using less intellectual effort?

Here are questions that I continue to have about the "II" Initiative which I do not expect immediate answers. Perhaps the value would be a sample of what we might expect to hear from others in their hearing about this initiative.

1. Given the knowledge base, the commitment and energy level, the set of skills in management and negotiations and the understanding of the Jewish community that would be needed to be the executive of the II, is it realistic to expect one person to be available for this job in 1989? Might this not be a job designed for Seymour that someone else might find nearly impossible to assume?



2. I hear Seymour saying "I know how to approach solving the personal problems in Jewish education through a demonstration site approach." I do not know what he has in mind, but since he is the first to admit that this approach is far from common wisdom, I wonder how a very skilled executive would react to having to be quite dependent upon an outside source such as Seymour for the roadmap to success? Might not this set up a dependent relationship which would hamper the effectiveness of the II's functioning?
3. By definition, the II has no power of its own. Its power is derivative of the Commission on its successor who will appoint the officers, provide the mission and the funds and presumably evaluate its effectiveness. Yet the Commission has never acted as anything other than a deliberate body. How do we know what it means to work for the Commission? Who will be the real board of directors and will the board be able to work harmoniously to agree on directions and funding, etc? (Let's not forget many of the most powerful commissioners will seek expression for their own agendas.
4. The II is described as having many functions each of which will have to be filled by leading educators and each of which is crucial to its successful functioning. The suggestion is that the II will be located in one geographical spot and that the team will meet "every Monday morning," and team members will be out on the road negotiating with community leaders and managing complex educational initiatives. Have we really considered if a team like this can be assembled in one spot, and if so, how will its members manage to work together as a team and also direct all that traffic in, lets say, 3 sites? Might we not be talking about a considerably larger staff than just 3 or 4 members? Are they available?
5. We use the term demonstration site loosely to refer to an urban area such as Boston or Cleveland. Knowing the Jewish community of Boston, I can say we are speaking about 8 day schools, 4 JCC's, 8 summer camps, 6 Jewish preschools, 1 Hebrew College, 12 Hillel Foundations, scores of supplementary schools, etc. (These numbers are rough and depend on how you draw the boundaries.) How will 1 or 2 staff members from the II "manage" a process in which in a couple of years, we will turn around the personnel picture for so many institutions? What do we mean by "turn around"? What is the nature of the contract and with whom is it drawn?
6. Danny Margolis (BJE director) and Sam Shaffler (Hebrew College President) are two prominent Jewish educators who are already at work trying to "turn around" the personnel picture in Boston. They are



succeeding, if at all, in small increments. Neither has any role in the Commission and each may have some feelings about that. What is our strategy for working with people like them? What do we really mean by saying "we'll help you look better?" Do we want to be sending potential recruits to the Hebrew College for training? If not, or if we could not get "our people" in the college to do the training, wouldn't that discredit the college (which, like the BJE, is an agency of the Federation)?

7. If Brandeis were asked to be a resource for the II's work in Boston, we would be delighted to participate. But what could we offer? We have an excellent continuing education program to offer (not geared to educators). We have an MA program to offer. We have some expertise in informal and family education, in improving the organizational structures of schools and the generic skills of educators. We also have a large, impressive Judaic faculty who are not accustomed, for the most part, to teaching teachers. What we lack is an active interface with goals of the people involved in Jewish education in the Boston area. Who will teach us how to have a vital involvement while not sacrificing the energies we must continue to put into running our programs in the university? Wouldn't that be more difficult if it were Cleveland or Detroit?
8. It would take a hell of an effort to turn around the personnel picture in Boston in a short time period. If the small II team with the help of the local community and Brandeis could pull this off, would we have much energy left to turn around and work on replicating those efforts in Philadelphia? How is the knowledge base gathered in Boston to be transferred to Philadelphia in a way that will be truly helpful there? Even if they come to see what we have done in Boston, will it be applicable in Philly? Will we pull out resources from Boston to help Philadelphia? How does that work out in reality?

There are alternatives to the II Initiative. We know so because Seymour and Annette considered other possibilities. Sizer's model is about an alternative. Have we as a group fully understood why II is a better bet than all the alternatives? I for one do not know, and hence want a fuller, written response.



SPECIFY HOW TO SEND MESSAGE

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2/23/89

☐ TELEX NO. \_\_\_\_\_

☐ MAILGRAM \_\_\_\_\_

☒ FAX NO. 011-972-2-699-951

NO. OF PGS. 2  
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☒ REGULAR - Send at time rates are most economical

AFTER 3 P.M. PLEASE

TYPE (USING DOUBLE SPACES) OR PRINT CLEARLY

**TO:**

NAME Professor Seymour Fox  
COMPANY c/o Native Policy & Planning  
STREET ADDRESS Consultants  
CITY, STATE, ZIP Jerusalem, Israel  
PHONE NUMBER 02/662-296

**FROM:**

NAME Morton L. Mandel  
COMPANY Premier Industrial Corporation  
DEPARTMENT Chairman of the Board  
COST CENTER 090

TELEX NO.: 6873015 PREMI UW

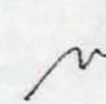
FAX NO.: 2163918327

TIME SENT:

**MESSAGE:**

copy/ART J. NAPARSTEK ✓

AMERICAN JEWISH  
ARCHIVES

Art - also sent  
the attached  
to Seymour  


Some suggestions for I.I. Unit

1. It should be free-standing.
2. Its mission should be to identify ways to improve the system, and stimulate existing institutions to undertake pieces of work to advance the cause. It may cause new organizations to be formed, as needed.
3. It will have a Board of outstanding lay leaders blending experience, knowledge, and financial strength.
4. It will continuously develop and revise strategies, generally in concert with other persons or institutions.
5. It will be a central address, both for funding sources and for relevant institutions, who will seek guidance in accomplishing their objectives.
6. It will be a full-time catalyst, acting in a planful, strategic way, while exploiting targets of opportunity.
7. It will seek to link priority pieces of work with various funders and competent implementers. It will be an "honest Broker".
8. Communities as a whole will be a basic building block, and seen as the principal "laboratory" (versus the individual institutions that deliver service within a community).
9. Its initial focus will be on our enabling options.
10. It will assist funders in moving ahead with programmatic options in which they have an interest, acting as a consultant, and providing monitoring and/or evaluation as appropriate.
11. All major relevant institutions will be seen as "clients".
12. Its small staff must be superior.
13. Operating expenses will be funded by its Board.





# Brandeis University

MAR 21 1989

*file - J Reimer*  
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*INFO*  
*✓ m*

Philip W. Lown  
School of  
Near Eastern and  
Judaic Studies

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

Waltham Massachusetts  
02254-9110

March 14, 1989

Mr. Morton L. Mandel  
Premier Industries  
4500 Euclid Ave.  
Cleveland, OH 44103-3780

*YEAH, TEAM!*

Dear Mort,

I know that you will be briefed thoroughly by Art Naparstek on our trip to Israel, but I wanted to add my own perspective and thanks.

For whatever reasons our last set of meetings in Cleveland in February was not a successful moment for communications and left our team divided. It meant that Art and I were not really in touch with the direction of thinking that Seymour and Annette were developing around the concept of implementation ("the ii") and were not clear on our own roles as members of the team. Clearly the team needed to be reconstituted.

The possibility to meet for four uninterrupted days in Jerusalem proved a wonderful remedy. It was not easy at first, but everyone was dedicated to working through misunderstandings and working on gaining mutual understanding. I cannot over-emphasize how graciously Seymour, Annette and their staffs received and hosted us and gave us their undivided attention until we could reconstitute ourselves as a team. When at the end we each spoke of how these meetings had met the goals we set forth, I felt grateful to you for this opportunity and fortunate to be part of a team that functions at this level of quality and dedication.

There obviously is much work before us, but I believe we will all approach the work now with a fuller heart and a clearer mind.

Sincerely yours,

*JR*  
Joseph Reimer

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# COMMUNICATIONS REPORT

AS OF MAR 17 '89 17:10

TIME	TO/FROM	MODE	MIN/SEC	PG	STATUS
17:08	•NATIVSp972 2 699951	G3-S	1/34	02	OK

*[Handwritten signature]*





COMMUNICATIONS REPORT

AS OF MAR 17 '89 17:07

TIME	TO/FROM	MODE	MIN/SEC	PG	STATUS
17:06	*NATIVOp972 2 699951	G3-S	0/23	00	INC





PREMIER INDUSTRIAL CORPORATION

**REQUEST FOR TELEX/MAILGRAM/FAX**

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SPECIFY HOW TO SEND MESSAGE

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3/17/89

☐ TELEX NO.☐ MAILGRAM☒ FAX NO. 9722699951NO. OF PGS. 2  
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TYPE (USING DOUBLE SPACES) OR PRINT CLEARLY

TO: ANNETTE HOCHSTEIN  
NAME SEYMOUR FOX  
COMPANY NATIV  
STREET ADDRESS  
CITY, STATE, ZIP JERUSALEM  
PHONE NUMBERFROM: ARTHUR NATARSTEK  
NAME  
COMPANY PREMIER  
DEPARTMENT  
COST CENTER 090

TELEX NO.: 6873015 PREMI UW

FAX NO.: 2163918327

TIME SENT:

**MESSAGE:**

Annette & Seymour,  
It looks like Joe had a good mtg (telephone)  
with you. Will talk to you on Monday.

Thanks, Regard



TO: Art Naparstek  
FROM: Joe Reimer  
DATE: March 16, 1989  
RE: Briefing Jon Woocher on 3/14/89

I briefed Jon on our Jerusalem discussions about the "11". Jon reacted very positively to the concept, immediately agreeing that the model of a mediating mechanism made very good sense to him. He resonated with the idea of consulting with and helping communities to plan for significant changes in their system of Jewish educational delivery.

Jon also saw a good deal of overlap between the "11" as proposed and the mission of JESNA. At one point he said the plan for "11" sounded like what JESNA would be doing were it to have more ample financial and staffing resources.

Jon believes that even as currently constituted and funded JESNA (the staff) has gained a lot of experience in working with communities on plans for upgrading Jewish education. He predicts the "11" staff will encounter the same nuts and bolts problems in negotiating with communities as have JESNA staff. The problems are of 1. fragmentation within the system of Jewish education,  
2. strong vested interest which resist change,  
3. the lack of data to guide change,  
4. the need to educate lay leadership, and  
5. the need for more professional expertise to guide the change.

Jon urgently suggests that in planning the "11" that we (the planning group) come and spend time with the JESNA staff and share our thoughts and learn from their on-the-ground experience with community planning and consultation. He invites Seymour and Annette and us to even find time during the first week in April.

Jon agreed to host the meeting of Commission educators on either April 5 or 6 in New York. I'll be calling the educators and seeing what is possible.

11

321  
Nativ Policy and Planning Consultants  
Jerusalem, Israel

נתיב-יועצים למדיניות ותכנון  
ירושלים

Tel.: 972-2-662 296; 699 951

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FACSIMILE TRANSMISSION

TO: MEMBERS OF THE PLANNING TEAM

DATE: MARCH 26, 1989

FROM: SEYMOUR FOX & ANNETTE HOCHSTEIN

NO. PAGES: 13

FAX NUMBER: 001-212-391-8327

Re : Attached draft paper on the 11

The attached paper is a draft that is incomplete. It is meant to serve as a basis for our discussions on Wednesday, March 29. A number of major issues have not yet been dealt with - e.g. we have only begun to deal in this paper with the question of the organization of local involvement and its relationship to the 11. We have not elaborated on the diffusion of innovation and on the relationship of the academic team to the work of the 11. Formulations are often preliminary and meant to enrich the discussion.

Looking forward to the meetings

Best regards

Seymour & Annette

June 14 paper  
quarters setup 15K  
look at ending  
2 pgs of posters



March 25, 1989

DRAFT - FOR DISCUSSION ONLY -- NOT FOR QUOTATION

## An Instrumentality for Implementation

S. Fox & A. Hochstein

### I. BACKGROUND

Between August and December 1988, the Commission on Jewish Education in North America engaged in a decision-making process aimed at identifying those areas where intervention could significantly affect the impact of Jewish education in North America.

A wide variety of possible options were considered. The Commission opted for focusing its work initially on two topics:

1. Dealing with the shortage of qualified personnel for Jewish education; and
2. Dealing with the community -- its structures, leadership and funding, as keys to across-the-board improvements in Jewish education.

At the same time, many commissioners urged that work also be undertaken in various programmatic areas (e.g. early childhood, informal education, programs for college students, day schools, supplementary schools).

### II. THE CHALLENGE

The wide consensus amongst commissioners on the importance of dealing with personnel and the community did not alleviate the concern expressed by some as to whether ways can be found to significantly improve the situation in these two areas. Indeed, a number of commissioners suggested that agreement that these areas were in need of improvement has existed for a long time amongst educators and community leaders. Ideas have been suggested; articles have been written; conferences have been held; some programs have been tried. Yet significant improvement has not come about. Some claim that we seem to know what the problem is, but have not yet devised a workable strategy for addressing it effectively in the field.



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The challenge facing the Commission is to develop creative, effective and feasible approaches for dealing with the topics at hand (personnel and community) and to launch the process that will bring across-the-board improvement and change.

### III. BRINGING ABOUT CHANGE

#### A. From the Options to Demonstration Centers

The theoretical basis for undertaking the personnel and community options has been debated by commissioners, staff and outside experts. Though the deliberation will continue throughout, the Commission decided the time has come to deal with the translation of these options into programs and projects.

A number of assumptions have guided our work as we have begun to consider implementation:

1. The community and personnel options are interrelated and a joint strategy involving both must be devised. Indeed, dedicated and qualified personnel is likely to affect the attitude of community leaders. Similarly, if the community ranks education high on its list of priorities, more outstanding personnel is likely to be attracted to the field.
2. Dealing effectively with the personnel issue will probably require a comprehensive approach: recruitment, training, profession-building and retention will all have to be dealt with simultaneously.
3. In addition to the complex package of interventions required by (1) and (2) above, the issue of the time necessary to introduce change will have to be addressed. This will require deciding on an appropriate balance between short, medium and long-term results.
4. All key stakeholders will need to be involved from the very beginning of this process. This includes commissioners, national organizations and institutions, local organizations and institutions, professionals (local and national), and funding sources.
5. The task is vast and complex and will be difficult to address at once and across-the-board.
6. Significant questions concerning the implementation of the two options can only be resolved in real-life situations, through the dynamics of thinking for implementation, and in the actual act of implementing.



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7. For all these reasons, we suggest that the Commission establish demonstration centers where we can deal with the community and personnel options.

8. By demonstration center we mean a site (a community, a network of institutions, one major institution, etc.) where the best ideas and programs in Jewish education would be demonstrated in as comprehensive a form as possible. It would be a site where the ideas and programs that have succeeded, as well as new ideas and experimental programs, would be undertaken. Work at this site will be guided by a vision of what Jewish education at its best can be. The best personnel would be recruited and educated on-the-job, the best leadership of the community would be recruited and inspired to take ownership and offer guidance to developments.

9. The assumption implicit in the suggestion of a demonstration center is that other communities would be able to see what a successful approach to the community and personnel options could be like, and would be inspired to replicate the ideas and programs in their own communities. Successful demonstration centers could create a snowball effect and lead to across-the-board change in Jewish education.

#### B. From Demonstration Center to a Mechanism for Implementation

1. As demonstration centers were being considered, a number of questions and issues related to their implementation arose:

2. Implicit in the notion of "demonstration" is the assumption that one knows what should and can be demonstrated. However, at this time some of what should and can be demonstrated in Jewish education needs to be developed or created.

3. Programs for implementation are seldom successful when they are "top-down" programs. Indeed, there is likely to be local resistance to change when communities or institutions are given ready-made plans. Communities must play a major role in the initiation of the idea, they must be full partners in the design of programs and be responsible for implementation.

4. Numerous questions need to be addressed in considering the demonstration center approach: Who will undertake the strategic thinking? Who will plan and ensure that the standards and goals of the Commission are maintained? Who will actively accompany the ideas through their stages of development and implementation? Who will deal with the unresolved issues as they arise in implementation? Who will see that things work, and that they



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can be replicated? Who will consider issues of change and replication of change throughout the universe of Jewish education?

5. A strong case exists for initiating change through demonstration centers. However, as the above issues were being considered by the staff -- in extensive consultation with experts -- it became clear that a means, a mechanism, is needed to deal with the development and implementation of demonstration centers. A way to mediate between ideas and implementation needs to be devised.

6. The possible role of this mechanism can be illustrated by way of an analogy borrowed from industry: the mechanism will be analogous to the unit that designs, develops and builds the prototype of a new product, improving upon it until that product works. When problems and issues arise during the process of constructing the prototype, they are dealt with and resolved in the unit. Lessons learned from implementation are absorbed and used to change, adapt and modify the product; the product is adapted to specific local needs, etc.

7. If successful, this mechanism could pre-empt a recurring weakness of demonstration projects in general education as well as in Jewish education - that of managing the process from the initial idea (e.g. set up a demonstration center for personnel in Jewish education) to its full implementation.

8. It is therefore suggested that a mechanism for implementation be created to be called (for lack of a better name at this time) "The Instrumentality for Implementation" (the ii).

#### IV. THE INSTRUMENTALITY FOR IMPLEMENTATION (ii)

##### A. The Mission

1. The ii will be a free-standing mechanism for the initiation and promotion of change and innovation in Jewish education. As such, it should be a place guided by vision, together with rigorous work and creative thinking. If successful, it will be a source of ideas, characterized by an atmosphere of ferment, search and creativity. It will be the driving force for change.

2. The ii will design and revise development strategies - often in concert with other persons and institutions. It will be a full-time catalyst for development efforts for Jewish education.



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3. The ii will undertake the assignment of creating demonstration centers. These demonstration centers will deal minimally with the two enabling options - where personnel will include: recruitment, training, profession building and retention, and community will include : bringing strong leadership into Jewish education, changing the climate and generating additional funding for education. In dealing with personnel and the community, it will also be dealing with programmatic options, e.g. as it recruits and trains personnel for early childhood programs, for the day schools, for informal programs, etc.

4. The goal of the demonstration center is to bring about major change in the quality of Jewish education in that center, through a successful approach to the options of personnel and the community. The importance of a center resides both in the possibility to effect and demonstrate change there, and in being the basis for inspiring change elsewhere.

5. The demonstration center will be a joint endeavour of an interested local community and the ii. The ii will assist in setting up the local mechanism (local ii) that will undertake responsibility of the demonstration center. Each demonstration center will have its local mechanism. Together, the local mechanisms will network for the promotion of change and the diffusion of innovation. The ii will act as facilitator for these development.

6. As work proceeds, existing institutions may have to be upgraded or re-built; the help of additional institutions may be enlisted and the project may cause new institutions to be established.

7. As it builds demonstration centers, the ii will identify ways to improve the system of Jewish education and to stimulate existing institutions to undertake pieces of the work to advance the cause.

8. In addition to this initial focus on demonstration centers, the ii will assist funders in moving ahead with programmatic options in which they have an interest by acting as a consultant and professional resource. The ii will be a central address for funding sources and institutions who seek guidance in their own development efforts.

9. Much of the definition of the work of the ii will occur in the actual process of implementation.



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## B. The ii At Work

The following is one possible scenario of the ii at work:

### 1. Staff and Governance

a. The ii will be a free standing mechanism, located in one specific place. It will have a staff to perform the multiple functions and will be governed by a board (see Appendix 1).

b. There will be a director, an executive, responsible for all the work of the ii. He/she will be an outstanding, high-level professional, committed to Jewish continuity, knowledgeable of the Jewish community of North America. He/she may be an educator, a manager, or both (to be determined.)

c. In addition to the director, a team of outstanding professionals will staff the ii (size and composition to be determined).

d. Governance of the ii will be in the hands of a board of lay leaders, scholars and professionals, blending experience, knowledge and financial strength.

e. The authority of the ii will derive from ideas that guide it, the board that governs it, and the prestige and status of the staff involved.

### 2. Functions

a. In order to meet the complex tasks involved in developing demonstration centers, various functions will be undertaken. They will be linked organically and will complement each other. They may include:

- i. research, data collection, planning and policy analysis;
- ii. community interface (for demonstration sites);
- iii. funding facilitation;
- iv. monitoring, evaluation and feedback;
- v. diffusion of innovations.

b. The work of the ii will be guided on an ongoing basis by the vision, the educational content and the philosophy that are at the heart of the Commission's endeavour. The sources for these will include the staff, consultants throughout the world, institutions, scholars, community leaders. These content aspects of the work will be dealt with as a distinct function for the ii and will be the responsibility of the academic team.



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c. Some of the content and rationale for the above functions include:

**i. research, data collection, planning and policy analysis**

\* To improve and maximize the knowledge-base upon which decisions for Jewish education are made [in a demonstration center and/or in general? To be determined]. This may be viewed as the research and planning arm of the ii - the work may be commissioned, done in-house or others may be encouraged to do various parts. The necessary data-bases will be created here; major issues will be studied, key questions will be researched (e.g. create inventories of Jewish educational resources; undertake needs analyses; set norms and standards for training; assess the quality of existing training; analyze community structures in relationship to Jewish education, etc.).

\* To provide the analysis needed for informed decisions. (E.g. What are relevant criteria for the selection of demonstration centers? What is the nature of the problem/s in that site? What are the political and institutional givens relevant to change in the demonstration center? Who are the stakeholders and how can they be involved? What are the financial and financing possibilities?)

\* To provide - upon decision to undertake a project - the knowledge and planning support needed and wanted by the demonstration center; to work WITH the local ii in the demonstration center and provide expertise that may be needed; to ensure the level and quality of the work intended.

\* To be the arm for planning and strategic thinking. It is here that development plans will be designed and strategies will be defined and revised on an ongoing basis. This work will extensively involve other persons and institutions.

**ii. community interface (for demonstration centers)**

\* While the ii will be a free-standing mechanism, it will work extensively with the communities where demonstration centers are located. It will do so by means of some form of local ii's that it will help establish.

The community interface function will deal with:

\* Initiation of negotiations with relevant stakeholders and community leaders about undertaking the project.



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\* Help the local community establish mechanisms for the demonstration projects (ii's) and recruit staff for them.

\* Ongoing facilitation during implementation - as needed (e.g. negotiations with national training institutions, universities, organizations, etc.). Assistance as needed (e.g. crisis management, dealing with resistance, enlisting community leaders' help when needed, etc.). The ii staff will be pro-active in its support of the local management of the projects. Relevant ii staff will travel to demonstration center for ongoing contact with the local team.

**iii. funding facilitation**

\* Brokering between various possible sources of funding (foundations, national organizations, local sources of funds, federations, individuals) and the demonstration center (direct and indirect, with the help of the board, local leaders, etc.).

**iv. monitoring, evaluation and feedback**

The purpose of this function is threefold:

\* To monitor the implementation of decisions on an ongoing basis and thereby enable trouble-shooting, changes, interventions as needed.

\* To evaluate - in whatever form or forms deemed most relevant - the nature, quality and impact of changes.

\* To create and activate feedback loops that will allow a dialogue between what happens in practice and the planning and theoretical functions. If successful, this loop will allow for an ongoing process of cross-fertilization: the content of both the practical and the theoretical will be affected, enriched and changed accordingly.

**v. diffusion of innovations**

The goal of the Commission on Jewish Education in North America is to bring about across-the-board (systemic) change in Jewish education by dealing with the areas of personnel and the community. The ii will deal with the complex issue of the diffusion of innovations from one or more demonstration centers to many or all communities. Strategies will be devised to maximize change throughout the community.



### 3. Organization of Functions

In order for each of the above five functions to be given the attention needed, and that none be overwhelmed or overtaken by pressing needs of other functions, they should probably be structured as distinct units. The staff of any one may be as small as a part-time person or as large as a full team - as needed - however each function should have autonomous importance and authority.

### 4. How will the ii begin its work?

a. A pre-planning process will be undertaken with the director of the ii (and - depending on circumstances - with staff members too). It should begin as soon as the notion of an ii is adopted.

b. This process - which will be a joint learning endeavour aimed at transferring knowledge and authority to the director could take the form of a several-week-long seminar (in Cleveland and/or Jerusalem) with a fully-developed "curriculum". The "faculty" should include MLM, commissioners, academics, professionals from the field, as well as members of the planning team. The process will involve:

i. extensive work of the director with members of the planning team to familiarize himself with the background, concepts and ideas of the ii.

ii. extensive work with members of the planning team, senior policy advisors, some educators and commissioners to familiarize himself with the reality of the situation of Jewish education in North America and with the communal and institutional aspects of the issue.

c. Following the above and any additional consultation they wish to hold, the first task of the staff will be to elaborate on and detail the ii's mission as defined by the Commission. (The Commission's charge to the ii staff will provide the basis of the mission statement; the staff will have to expand, detail and amend as needed.)

d. The staff will present its proposed expanded mission statement to the board for consideration, discussion and approval.

e. It is understood that these strategies will be reviewed on an ongoing basis, in extensive consultations with other institutions and individuals.

f. The initial structure of the ii will be formulated (though open to reconsideration) in accordance with the mission statement.



## 5. Towards Demonstration Centers

a. Amongst the early steps in its work, the ii will have to decide on appropriate definitions of demonstration centers for the personnel and community options. Possibilities include: all educational endeavours in a community, a network of institutions (e.g. a camping network or school system) or a set of programs. The data collection and policy analysis unit will prepare a proposal for discussion.

b. Criteria for the selection of demonstration centers will be developed (e.g. communities' desire to be involved in a major development effort; communities' commitment to Jewish education; availability of general educational resources; optimal size; socio-economic and Jewish education indicators; leadership - current and potential; etc.).

This data may be largely available or may have to be collected by the unit. In some instances, it may have to be produced.

c. The proposal will be brought for discussion to the regular staff meeting of the ii, where it will be argued, discussed and altered as the case may be.

d. The head of the ii and its relevant units will then begin a round of consultations to check further the feasibility and wisdom of the specific suggestions. Board members and relevant people and institutions in candidate communities will be consulted. These consultations will include assessments of local interest and commitment, likely interest and involvement of stakeholders, likely availability of resources, etc.

e. When the staff is ready, it will present its plan to the board for discussion, revision and decision.

f. Following extensive review of the feasibility and assessments of the chances for change and success, negotiations will be undertaken with one or more communities for the setting of demonstration centers. (see below)

## 6. The ii and Demonstration Centers

a. Upon decision and agreement to undertake the development of a demonstration center, work will begin.

b. The success of demonstration centers will be largely dependent upon the local ownership, involvement, investment in the endeavor.



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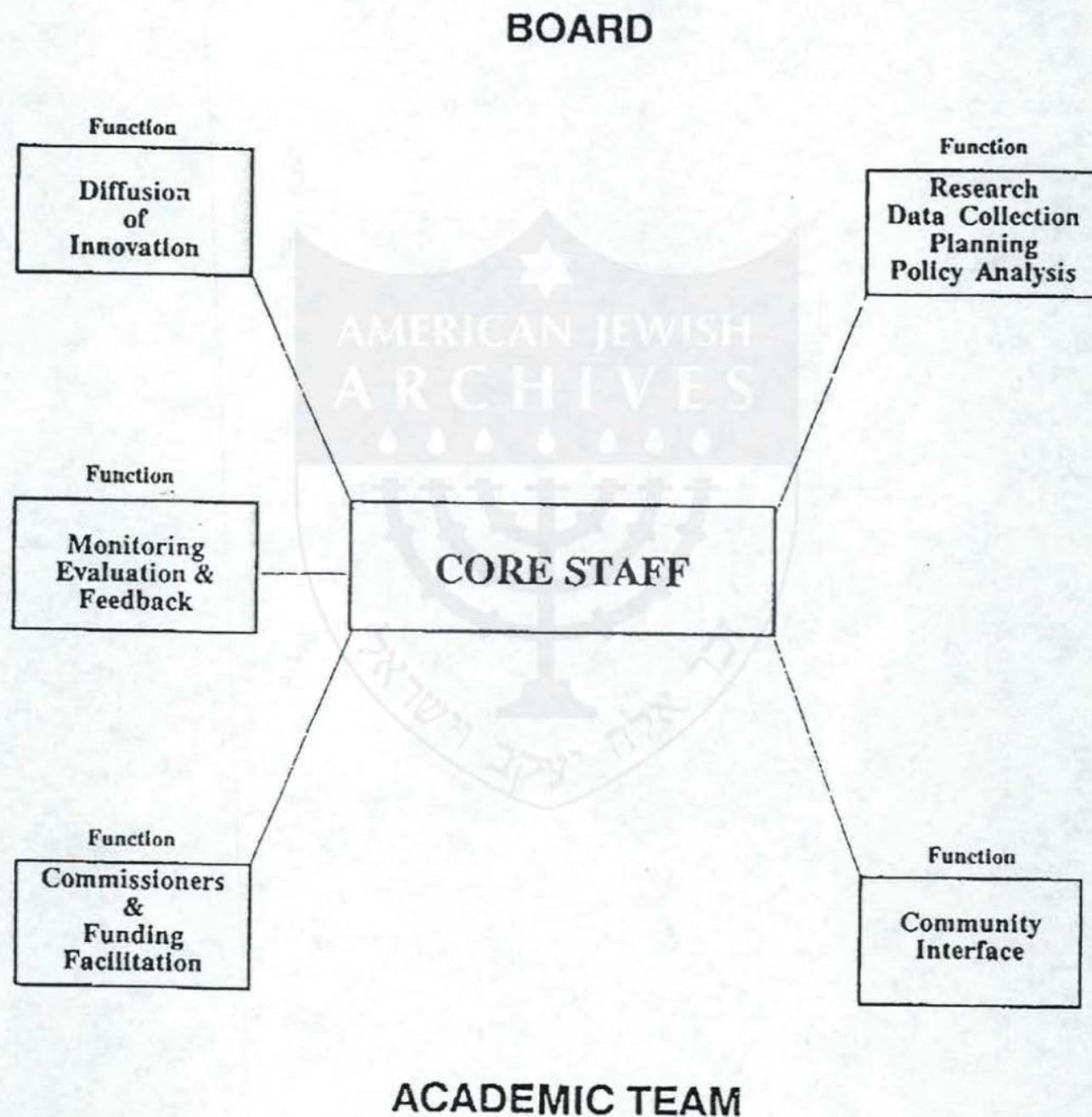
c. The assumption is that change will come about in the community, with the ii acting as facilitator, catalyst of local thinking and initiation, and resource for change with the community. The community will participate fully in this process and take over parts or all, as fast as it can develop the capability to do so. The ii will provide the necessary support and act a resource.

d. In cooperation with the local leadership of the demonstration center, the ii will help set up a local mechanism - a local version of the ii - (existing institution, coalition of institutions, planning team, etc.) that will take responsibility for the demonstration center.

e. The ii will enter into a contractual agreement with the demonstration center (community). This agreement will stipulate the mutual roles and undertakings. E.g. There will be explicit definitions of the purpose of demonstration centers, of the standards of work and of the expected activities. The principles guiding the work will be agreed upon. The process of planning, implementing, monitoring, evaluating, feedback, will be developed jointly to ensure local ownership, as well as excellence.

f. Careful thought will be given to develop an effective relationship between the demonstration community and the ii. The purpose of the ii's intervention will be to improve local capability and autonomy and to help ensure the quality of the output, the effective qualitative change of Jewish education in that community.

This paper is UNFINISHED.

The ii -- Organizational Design



March 29, 1989

DRAFT - FOR DISCUSSION ONLY -- NOT FOR QUOTATION

## A Mechanism for Initiatives in Jewish Education

S. Fox & A. Hochstein

### I. BACKGROUND

Between August and December 1988, the Commission on Jewish Education in North America engaged in a decision-making process aimed at identifying those areas where intervention could significantly affect the impact of Jewish education in North America. *toward the end of ensuring J. continuity.*

A wide variety of possible options <sup>was</sup> were considered. The Commission opted for focusing its work initially on two topics:

1. Dealing with the shortage of qualified personnel for Jewish education; and
2. Dealing with the community -- its structures, leadership and funding, as keys to across-the-board improvements in Jewish education.

At the same time, many commissioners urged that work also be undertaken in various programmatic areas (e.g. early childhood, informal education, programs for college students, day schools, supplementary schools)..

### II. THE CHALLENGE

The wide consensus among commissioners on the importance of dealing with personnel and the community did not alleviate the concern expressed by some as to whether ways can be found to significantly improve the situation in these two areas. Indeed, a number of commissioners suggested that agreement that these areas were in need of improvement has existed for a long time among educators and community leaders. Ideas have been suggested; articles have been written; conferences have been held; some programs have been tried. Yet significant improvement has not come about. Some claim that we seem to know what the problems are, but have not yet devised a workable strategy for addressing them effectively in the field.

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The challenge now facing the Commission is to develop creative, effective and feasible approaches for dealing with the topics at hand (personnel, the community - and later programmatic options) and to launch the process that will bring across-the-board improvement and change.

### III. SOME UNDERLYING ASSUMPTIONS

1. To respond to the above challenge it is necessary to demonstrate that the personnel and community options can indeed be acted upon in the comprehensive manner ~~that they were~~ *in which* formulated. For personnel this involves recruitment, training, retention and profession-building. For the community this involves recruiting outstanding leadership, changing the climate and generating significant additional funding.
2. It is difficult to meet this challenge on the national level because it is too complex and too vast. *because much happens on local level.*
3. On the other hand there is good cause to believe that it could be undertaken on the local level, for the following reasons:
  - a. *M*uch of education takes place only on the local level.
  - b. the scope of a local undertaking that would be comprehensive could be manageable. There is sufficient energy and there are enough people to undertake such a project.
  - c. The results of a local undertaking would be tangible and visible and could generate interest and reactions that might lead to a national debate on the important issues of Jewish education.
  - d. *A* local project could be managed in a hands-on manner. Therefore, it could be constantly improved and fine-tuned.
  - e. there are ideas and programs (best practice) that if brought together, integrated and implemented in one site could have significantly greater impact than they have today when implementation is fragmented. The whole is greater than the sum of its parts.
  - f. *V*isions of Jewish education could be translated and experimented with in a ~~limited~~ *partial* and manageable way.
  - g. *N*ational institutions and organizations could be mobilized for such experimental programs. They would view this as an



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opportunity to test and develop new conceptions <sup>s</sup> <sup>in</sup> for Jewish education.

h. <sup>P</sup> People could be recruited and mobilized for tangible local demonstrations. The pool could be expanded to include - in addition to the current cadre of outstanding educators :

1. Rabbis
2. Scholars of Judaica (Twersky, etc)
3. Federation executives
4. Jewish scholars in the humanities and sciences (Scheffler, Schon, Lipsett, Ginzburg, etc...)

4. Local sites could be networked for greater impact.

5. Working on the local scene could take advantage of working both from the "bottom-up" and from the "top-down".

#### IV. BRINGING ABOUT CHANGE

##### A. From Options to Community Action Sites

The theoretical basis for undertaking the personnel and community options has been debated by commissioners, staff and outside experts. Though the deliberation will continue throughout, the Commission decided the time has come to deal with the translation of these options into programs and projects.

A number of assumptions have guided our work as we have begun to consider implementation:

1. The community and personnel options are interrelated and a joint strategy involving both must be devised. Indeed, dedicated and qualified personnel is likely to affect the attitude of community leaders towards education. Similarly, if the community ranks education high on its list of priorities, more outstanding personnel is likely to be attracted to the field.
2. Dealing effectively with the personnel issue will probably require a comprehensive approach: recruitment, training, profession-building and retention will all have to be dealt with simultaneously.
3. In addition to the complex package of initiatives and interventions required by (1) and (2) above, the issue of the time necessary to introduce change will have to be addressed. This will require deciding on an appropriate balance between

*needs more  
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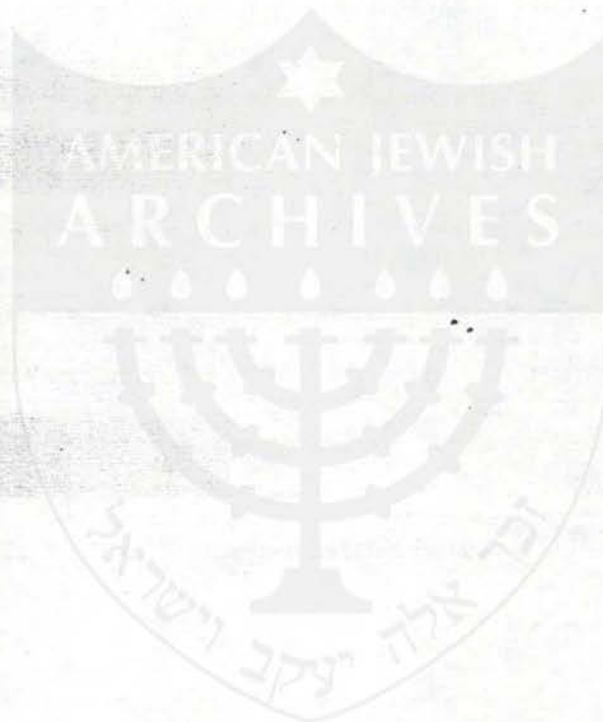
*Add something on relationship to  
programmatic concerns*

short, medium and long-term results.

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4. All key stakeholders will need to be appropriately involved from the very beginning of this process. This includes commissioners, national organizations and institutions, local organizations and institutions, professionals (local and national), and funding sources.

5. Significant questions concerning innovation and implementation of the two enabling options - and of the programmatic options when they will be addressed - can only be resolved in real-life situations, through the dynamics of thinking for implementation, and in the actual act of implementing.





6. For all these reasons, we suggest that the Commission work with communities that wish to become Community Action Sites where we can deal with the community and personnel options.

7. By Community Action Site we mean a site (a community, a network of institutions, ~~one major institution~~, etc.) where some of the best ideas and programs in Jewish education would be initiated in as comprehensive a form as possible. It would be a site where the ideas and programs that have succeeded, as well as new ideas and experimental programs, would be undertaken. Work at this site will be guided by a vision of what Jewish education at its best can be.

8. The assumption implicit in the suggestion of a Community Action Site is that other communities would be able to see what a successful approach to the community and personnel options could be like, and would be inspired to apply the lessons learned to their programs, in their own communities.

#### B. From Community Action Sites to a Mechanism for Initiatives in Jewish Education.

1. As Community Action Sites were being considered, a number of questions and issues related to their implementation arose:

2. Implicit in the notions of change, innovation, new initiatives, demonstration, is the assumption that one knows what should and can be changed and demonstrated. However, at this time some of what should and can be changed, innovated, demonstrated in Jewish education needs to be developed or created.

3. Programs for implementation are seldom successful when they are "top-down" programs. Communities must play a major role in the initiation of the idea, they must be full partners in the design of programs and in their implementation.

4. Numerous questions need to be addressed in considering the Community Action Sites approach: Who will undertake the strategic thinking? Who will plan and ensure that the standards and goals of the Commission are maintained? Who will actively accompany the ideas through their stages of development and implementation? Who will deal with the unresolved issues as they arise in implementation? Who will see that things work, and that they can be replicated? Who will consider issues of change and replication of change throughout the universe of Jewish education?



5. A strong case exists for initiating change through Community Action Sites. However, as the above issues were being considered by the staff -- in extensive consultation with experts -- it became clear that a means, a mechanism, is needed to deal with Community Action Sites. A way to mediate between ideas and implementation needs to be devised.

6. The possible role of this mechanism can be illustrated by way of an analogy borrowed from industry: the mechanism will be analogous to the unit that designs, develops and builds the prototype of a new product, improving upon it until that product works. When problems and issues arise during the process of constructing the prototype, they are dealt with and resolved in the unit. Lessons learned from implementation are absorbed and used to change, adapt and modify the product; the product is adapted to specific local needs, etc.

7. It is therefore suggested that a mechanism for implementation be created to be called (for lack of a better name at this time) the mechanism for "Initiatives in Jewish Education" (IJE).

#### IV. THE MECHANISM FOR INITIATIVES IN JEWISH EDUCATION (IJE)

##### A. The Mission

1. The IJE will be a free-standing mechanism for the initiation and promotion of change and innovation in Jewish education. As such, it should be a center guided by vision, together with rigorous work and creative thinking. If successful, it will be a source of ideas, characterized by an atmosphere of ferment, search and creativity. It will be the driving force for systemic change.

2. The IJE will design and revise development strategies - generally in concert with other persons and institutions. It will be a full-time catalyst for development efforts for Jewish education.

3. The IJE will undertake the assignment of creating Community Action Sites. These Community Action Sites will deal minimally with the two enabling options - where personnel will include: recruitment, training, profession building and retention, and community will include: bringing strong leadership into Jewish education, changing the climate and generating additional funding for education. Through personnel and the community, it will also be dealing with programmatic



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options, e.g. as it recruits and trains personnel for early childhood programs, for the day schools, for informal programs, etc.

4. The goal of the Community Action Site is to bring about major change in the quality of Jewish education in that Site, through a successful approach to the options of personnel and the community. The importance of a site resides both in the possibility to effect and demonstrate change there, and in being the basis for inspiring change elsewhere.

5. The Community Action Site will be a joint endeavour of an interested local community and the IJE. The IJE will assist, if needed, in setting up the local mechanism (local IJE) that will undertake responsibility for the Community Action Site. Each Site will have its local mechanism. Together, the local mechanisms will network for the promotion of change and the diffusion of innovation. The IJE will act as facilitator to create a network of such local mechanisms.

6. Conditions are bound to change as a result of the work of the IJE. As work proceeds, existing institutions may want to respond to emerging needs. The IJE may cause new institutions to be established - when no viable alternative exists.

7. In addition to this initial focus on Community Action Sites, the IJE will assist funders, as appropriate, in moving ahead with programmatic options in which they have an interest by acting as a consultant and professional resource. The IJE will be a central address for funding sources and for institutions who wish to work cooperatively with the IJE in their own development efforts. It may also help local IJE's find funding for their initiatives.

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The following is one possible scenario of the IJE at work:

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a. The IJE will be a free standing mechanism. It will have a staff to perform multiple functions and will be governed by a Board of Trustees (see Appendix 1).



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b. There will be a director, responsible for all of the work of the IJE. He/she will be an outstanding, high-level professional, committed to Jewish continuity, knowledgeable of the Jewish community of North America. He/she may be an educator, a manager, or both (to be determined.)

c. In addition to the director, a team of outstanding professionals will staff the IJE (size and composition to be determined).

d. Governance of the IJE will be in the hands of a board composed of lay leaders, scholars and professionals, blending experience, knowledge and financial strength.

e. The authority of the IJE will derive from the ideas that guide it and the prestige, status and effectiveness of its Board and staff.

## 2. Functions

a. In order to meet the complex tasks involved, the IJE will undertake various functions. They will be linked organically and will complement each other. They may include:

- i. research, data collection, planning and policy analysis;
- ii. community interface (for demonstration sites);
- iii. funding facilitation;
- iv. monitoring, evaluation and feedback;
- v. diffusion of innovations.

b. The work of the IJE will be guided on an ongoing basis by the vision, the educational content and the philosophy contained in the final report of the Commission. To insure the above ongoing inputs will be received from the staff of the IJE, consultants throughout the world, institutions, scholars and community leaders. A Professional Advisory Board will be established to stimulate this activity.

c. Some of the content and rationale for items i-v above include:

### i. research, data collection, planning and policy analysis

\* This may be viewed as the research and planning arm of the IJE. It will improve and maximize the knowledge-base upon which decisions for Jewish education are made. The work may be commissioned, done in-house or others may be encouraged to do various parts. The necessary data bases will be created here; major issues will be studied, key questions will be researched



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(e.g. create inventories of Jewish educational resources; undertake needs analyses; set norms and standards for training; assess the quality of existing training; analyze community structures in relationship to Jewish education, etc.).

\* To provide the analysis needed for informed decisions. (E.g. What are relevant criteria for the selection of Community Action Sites? What is the nature of the problem/s in that site? What are the political and institutional givens relevant to change in the Community Action Site? Who are the stakeholders and how can they be involved? What are the financial and financing possibilities?)

\* To provide the knowledge and planning support needed and wanted by the Community Action Sites; to work with the local IJE in the Community Action Sites and provide expertise that may be needed; to help ensure the level and quality of the work intended.

\* To be the arm of the IJE for planning and strategic thinking. It is here that development plans will be designed and strategies will be defined and revised on an ongoing basis. This work will extensively involve other persons and institutions.

ii. community interface (for Community Action Sites)

\* The IJE will work extensively with the communities where Community Action Sites are located. It will do so by means of local mechanisms that will be established.

The community interface function may deal with:

\* Initiation of negotiations with relevant stakeholders and community leaders about undertaking the process of becoming Community Action Sites.

\* Help the local community establish a mechanism for its Community Action Sites and assist in recruiting staff for such mechanisms.

\* Ongoing facilitation during implementation - as needed (e.g. assistance in negotiations with national training institutions, universities, organizations, etc.). The IJE staff will be proactive in its support of the local management of the Community Action Sites. Relevant IJE staff will maintain ongoing contact with the local team.

iii. funding facilitation

This function may include the following:

\* To undertake as appropriate, brokering between various possible sources of funding (foundations, national organizations,



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local sources of funds, federations, individuals) and the Community Action Sites.

- \* To be a central address both for funding sources and for relevant institutions who will seek guidance in accomplishing their objectives.

- \* To seek to link high priority pieces of work with various funders and competent implementors.

- \* To assist funders in moving ahead with programmatic options in which they have an interest, acting as a consultant, and providing professional assistance as appropriate.

iv. monitoring, evaluation and feedback

The purpose of this function is threefold:

- \* To monitor activity of each Community Action Site.

- \* To evaluate - in whatever form or forms deemed most relevant - the progress of Community Action Sites.

- \* To create and activate feedback loops to connect practical results with a process of re-thinking, re-planning and implementation.

v. diffusion of innovation

The goal of the Commission on Jewish Education in North America is to bring about across-the-board systemic change in Jewish education, by initially dealing with the areas of personnel and the community. The IJE will deal with the complex issue of the diffusion of innovation from one or more Community Action Sites to many or all communities. Strategies will be devised to maximize change throughout the community.

3. Organization of Functions

In order for each of the above five functions to be given the attention needed, and that none be overwhelmed or overtaken by pressing needs of other functions, they should probably be structured as distinct units. The staff of any one may be as small as a part-time person or as large as a full team - as needed - however each function should have autonomous importance and authority.

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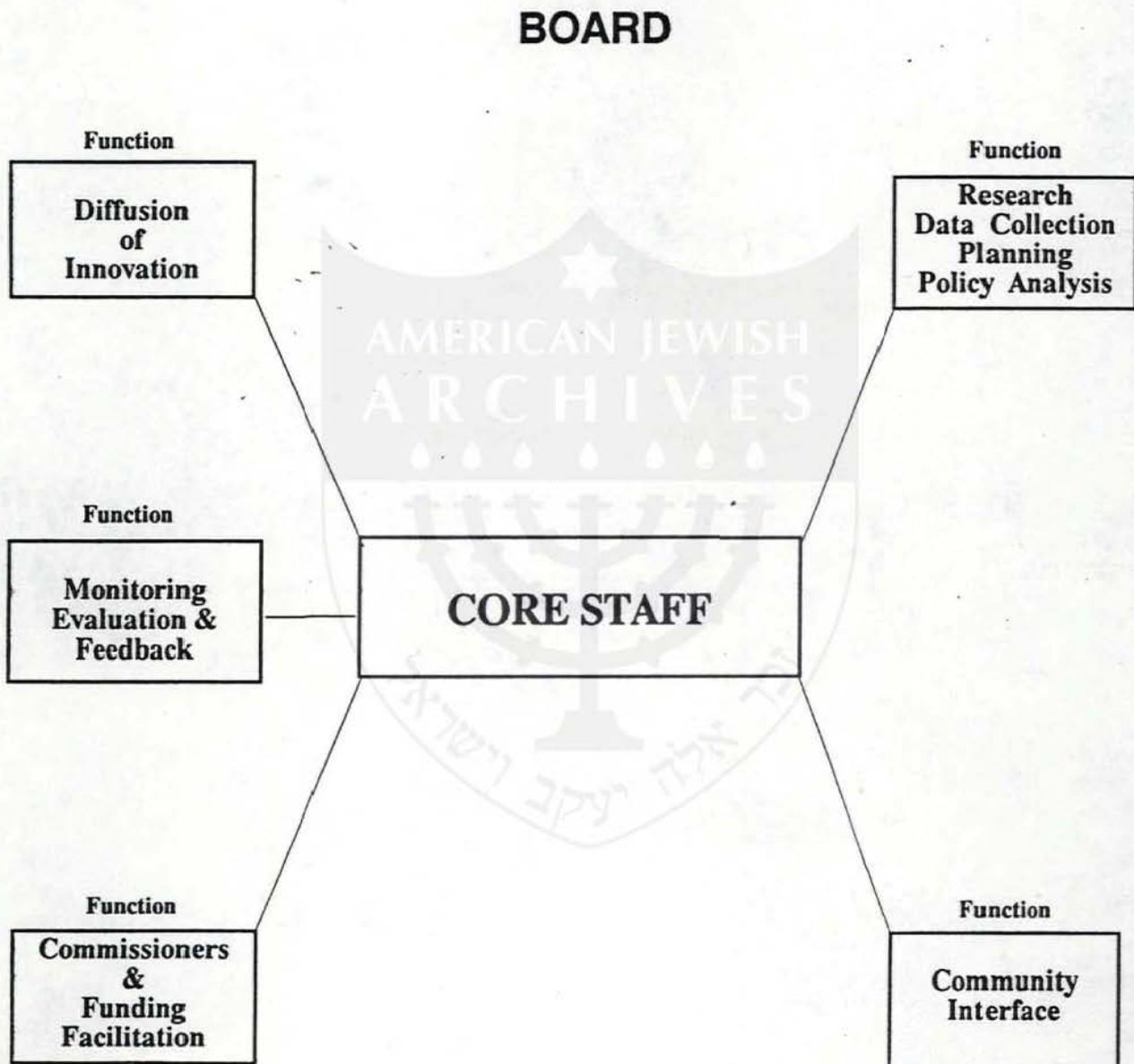


4. How will the IJE begin its work?

- a. Once the notion of an IJE is adopted by the Commission, a comprehensive plan will be developed to launch the IJE. At the appropriate time a Board will be constituted and a director will be hired.



The ii -- Organizational Design



**ACADEMIC TEAM**

PROFESSIONAL ADVISORY TEAM



March 29, 1989

DRAFT - FOR DISCUSSION ONLY -- NOT FOR QUOTATION

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**S. Fox & A. Hochstein**

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## AMERICAN JEWISH ARCHIVES

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\* To provide the analysis needed for informed decisions. (E.g. What are relevant criteria for the selection of Community Action Sites? What is the nature of the problem/s in that site? What are the political and institutional givens relevant to change in the Community Action Site? Who are the stakeholders and how can they be involved? What are the financial and financing possibilities?)

\* To provide the knowledge and planning support needed and wanted by the Community Action Sites; to work with the local IJE in the Community Action Sites and provide expertise that may be needed; to help ensure the level and quality of the work intended.

\* To be the arm of the IJE for planning and strategic thinking. It is here that development plans will be designed and strategies will be defined and revised on an ongoing basis. This work will extensively involve other persons and institutions.

#### ii. community interface (for Community Action Sites)

\* The IJE will work extensively with the communities where Community Action Sites are located. It will do so by means of local mechanisms that will be established.

The community interface function may deal with:

\* Initiation of negotiations with relevant stakeholders and community leaders about undertaking the process of becoming Community Action Sites.

\* Help the local community establish a mechanism for its Community Action Sites and assist in recruiting staff for such mechanisms.

\* Ongoing facilitation during implementation - as needed (e.g. assistance in negotiations with national training institutions, universities, organizations, etc.). The IJE staff will be proactive in its support of the local management of the Community Action Sites. Relevant IJE staff will maintain ongoing contact with the local team.

#### iii. funding facilitation

This function may include the following:

\* To undertake as appropriate, brokering between various possible sources of funding (foundations, national organizations,



local sources of funds, federations, individuals) and the Community Action Sites.

- \* To be a central address both for funding sources and for relevant institutions who will seek guidance in accomplishing their objectives.

- \* To seek to link high priority pieces of work with various funders and competent implementors.

- \* To assist funders in moving ahead with programmatic options in which they have an interest, acting as a consultant, and providing professional assistance as appropriate.

#### **iv. monitoring, evaluation and feedback**

The purpose of this function is threefold:

- \* To monitor activity of each Community Action Site.

- \* To evaluate - in whatever form or forms deemed most relevant - the progress of Community Action Sites.

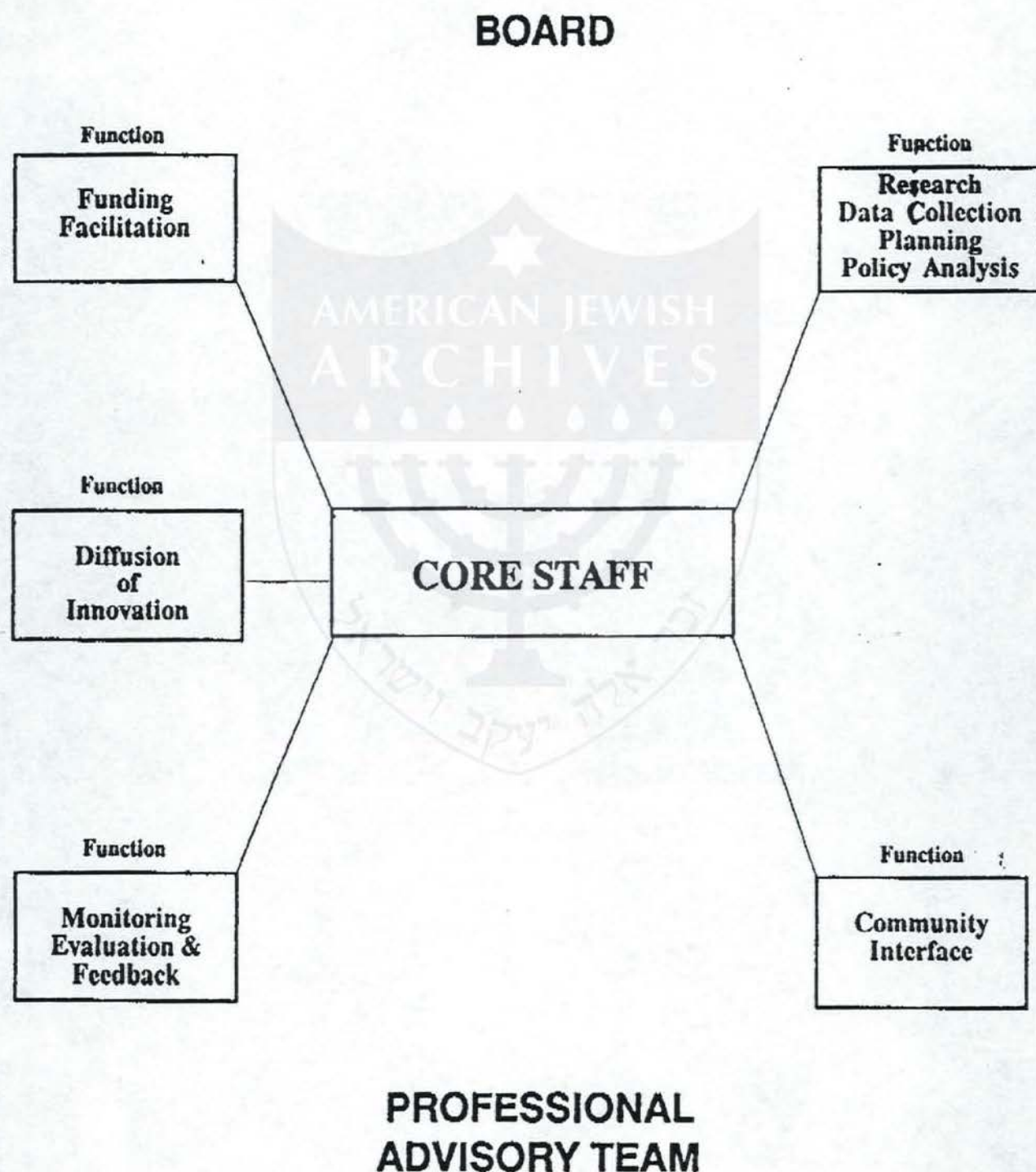
- \* To create and activate feedback loops to connect practical results with a process of re-thinking, re-planning and implementation.

#### **v. diffusion of innovation**

The goal of the Commission on Jewish Education in North America is to bring about across-the-board systemic change in Jewish education, by initially dealing with the areas of personnel and



The ii – Organizational Design



MLM

Position Description

Director

IJE

A. Position Summary

The director of the IJE is to give leadership in North America to the promotion of change and innovation in Jewish education. He or she will guide a management and planning process that is characterized by an approach which is proactive, engages in thoughtful and thorough analysis in the design and implementation of development strategies.

The director will offer the donors and the board a source of vision, a base of knowledge in Jewish education, and will network with and convene those from educational institutions, national organizations, foundations and experts from the educational, denominational, and federation communities in developing strategies of change in Jewish education throughout North America.

The director of IJE is responsible to the Board of Trustees for directing all activities of the organization in accordance with ~~its~~ <sup>IJE</sup> mission statement. This includes managing day-to-day operations, hiring, developing and motivating staff and coordinating IJE internal and external efforts to enhance work on a cross national (USA and Canada) basis and with communities in the development and implementation of demonstration Centers.

Position Duties and Responsibilities

1. Work with members of the Board of Trustees to keep them informed, motivated and committed to ~~the~~ <sup>IJE</sup>.
2. Develop and implement strategies to involve lay leaderships in all aspects of the program.
3. Manage a strategic planning process that will lead to implementation initiatives consistent with the ~~IJE~~ <sup>IJE</sup> overall strategy. Includes setting priorities for demonstrations in the areas of personnel and community, determining appropriate response to requests from demonstration sites for IJE support, staff assistance (and, where appropriate, leadership to undertake and complete initiatives.



4. Manage relationships with and serve as a resource to national and local groups pursuing related efforts (Federations, Synagogues, Bureaus).
5. Develop a manage or working partnership among local and national funders to increase and optimize support and investment in demonstration center programming.
6. Stimulate the development of, provide counseling to, on where appropriate, oversee and manage common pools on projects which utilize philanthropic monies dedicated to demonstration initiatives.
7. Identify, solicit and work with other organizations to research and support policies and practices that will increase or improve funding for Jewish education on a national and local level.
8. Manage and give leadership to a staff competent in the technical aspects of ~~the~~ work (research, planning, analysis, evaluation, diffusion of innovation), to work with consultants, scholars and lay leaders throughout the world in bringing a team approach to bear in developing and implementing the demonstrations.

#### Attributes

1. Excellent communication.
2. Commitment to Jewish education as a means of further Jewish continuity.
3. Creative thinker (innovative; able to envision the future.
4. Hands on Manager (able to perform effectively with a small staff, capable of networking and motivating other people to accomplish tasks.
5. Low profile operations style - able and willing to work through others to accomplish objectives; willing to give credit to others (including other organizations) for significant accomplishments; patience with inevitable challenge of influencing others) effecting change without direct responsibility.

6. Initiative/high energy level - strong action orientation; able to provide continuity and energy; able to suggest new actions and/or programs.





From: Morton L. Mandel

To: Seymour Fox

Here are some more thoughts on possible outcomes of the Commission on Jewish Education. Let's discuss on April 18th telecon.

- Outcome #1     The IJE (i.i.)
- Outcome #2     Community Action Sites: From Demonstration to Implementation  
Organized or assisted by IJE, these would be partnerships and coalitions of local and continental bodies, generally under the local Federation flag, to test programs, leading to diffusion.
- Outcome #3     Personnel: Building a Profession  
A permanent ongoing process led by IJE, with multiple demonstration and pilot projects, to develop and test methods that facilitate personnel recruitment, training, and retention (generally performed at Community Action Sites).
- Outcome #4     Federation: A key factor for Jewish continuity  
An organized, long-term effort to achieve consensus that the local federation is the key convenor and sponsor of local programs to enhance Jewish continuity (e.g., Cleveland Commission). IJE to work closely with CJF to activate federations to take up this cause.
- Outcome #5     The North American Support System: A New Design  
A permanent process led by IJE and CJF to harmonize all the continental players (JWB, JESNA, Seminaries, etc.), in a way that brings them to a high level of effectiveness, overall or in selected areas.
- Outcome #6     Programmatic Options: Implementation  
A permanent ongoing process led by IJE to work with "champions" of programmatic options, as they can be identified, to develop fully those options:
1. - Champion is Chair of a Commission (e.g. Eli Evans)
  2. - Champion finances Commission or obtains financing)
  3. - IJE helps select and approves all Commission members
  4. - IJE helps select and approves Commission staff
  5. - IJE monitors and exercises quality control on each Commission
- Outcome #7     Research, Publications, etc.  
A permanent ongoing element of IJE. (To be designed).

CONFIDENTIAL

TO: Arthur J. Naparstek  
Virginia F. Levi

NAME

DEPARTMENT/PLANT LOCATION

FROM: Henry L. Zucker

NAME

DEPARTMENT/PLANT LOCATION

DATE: 5/24/89

REPLYING TO  
YOUR MEMO OF: \_\_\_\_\_

SUBJECT:

Fox and Hochstein seem obsessed with the idea of the ii. It's as though they determined before the Commission was organized that the ii would be the important result. In discussions about agenda, they start with the ii. Their interview reports reflect this same emphasis (overemphasis?). There seems to be a general opinion in the Commission that something like the ii should be developed. While this is a majority position, there is still some healthy skepticism about whether we should have an ii. There is certainly lots of questions about the auspices and the form which it should take. For example, some people believe that it should be a program of JESNA and/or JWB. There are lots of questions about what funding will be required.

It would probably be a lot healthier if we were to pursue first the subjects which will lead us to a conclusion that a follow-up mechanism is indeed required. This is a matter primarily of timing. Shouldn't we first pursue, in detail, such subjects as community/financing, personnel, local federation comprehensive planning for Jewish education, possibly a running outline of our final report, best practices, the state of Jewish education in North America, and a vision for the future. Once these areas are understood by the Commission, then would seem to be the time to pursue the follow-up mechanism. Then we would be in a better position to judge whether this should be a new organization (ii) or an intensified service by the national service agencies (JESNA, JWB). Also, we would want to discuss the question of whether the ii is the follow-up mechanism for the Commission and/or whether the Commission should be continued beyond June 1990 and/or whether the Commission should meet regularly or once a year.

INTER-OFFICE CORRESPONDENCE



TO: Morton L. Mandel  
NAME  
DEPARTMENT/PLANT LOCATION

FROM: Henry L. Zucker  
NAME  
DEPARTMENT/PLANT LOCATION

DATE: 9/20/89  
REPLYING TO  
YOUR MEMO OF: \_\_\_\_\_

SUBJECT:

You suggested that we should set up a small search committee to develop a job description of the IJE director and to begin to canvas prospects for the job.

I suggest the following committee: Mandel (chairman), Fox, Hoffman, Rotman, Stein, Woocher, Kraar, Zucker. If you want additional laymen on the committee, I would go for the presidents of JESNA, JWB, and CJF.



INTERNET OFFICE RECORDS

## DIRECTOR OF THE MECHANISM FOR IMPLEMENTATION

### Job Description

#### Introduction

The Commission on Jewish Education in North America has prepared an action plan and recommendations for dealing with the issues facing Jewish education in North America.

The action plan calls for major developments in the way that the community relates to Jewish education and allocates resources to it, and for steps towards developing the profession of Jewish education.

The plan also calls for the establishment of Community Action Sites to demonstrate what Jewish education at its best can be and for the development of national strategies in areas such as the training of educators, recruitment of qualified people to the profession and more.

#### The position

We are now looking for the chief professional officer to lead this innovative effort in Jewish education. This person, together with lay and professional colleagues of the highest calibre, will act as a catalyst in bringing about the implementation of the plan.

The director will provide leadership to the promotion of change and innovation in Jewish education in North America. He/she will co-ordinate and manage the process that will lead to implementation of the recommendations of the Commission for Jewish Education in North America.

Specifically, the position will involve:

- developing a small, elite, professional unit that will act as a catalyst to bring about change;
- bringing about the establishment of Community Action Sites;
- assisting in the planning and development of programmatic areas;
- co-ordinating funding efforts;
- providing planning and research assistance as needed;
- setting up evaluation, monitoring and reporting mechanisms.

#### Qualifications

The candidate must be a qualified, experienced, professional who has demonstrated leadership ability, is knowledgeable of the organized Jewish community in North America, preferably familiar with the universe of Jewish education, and able to work with a board of outstanding community leaders, scholars and professionals.



In addition he/she must have the following qualifications:

- a keen sense of lay-professional relations
- a clear understanding of the dynamics of the North American Jewish community and its finances
- a demonstrated ability for community relations
- a demonstrated ability to conceptualize complex matters
- a demonstrated ability for large-gift solicitation
- a demonstrated ability for management in the personnel and fiscal realms
- energetic, dynamic and articulate
- good writing skills



TO: Henry L. Zucker  
NAME  
DEPARTMENT/PLANT LOCATION

FROM: Virginia F. Levi  
NAME  
DEPARTMENT/PLANT LOCATION

DATE: 11/13/89  
REPLYING TO  
YOUR MEMO OF: \_\_\_\_\_

SUBJECT: IJE DIRECTOR

At our Operations meeting with MLM last week, we discussed the fact that before a position description can be set for the director of the IJE, the IJE design must be in place. The development of this design is an assignment of Seymour Fox and Annette Hochstein.

It was suggested that a discussion of the design and a review of AH's proposed position description be placed on the agenda for the December 6 meeting of senior policy advisors. In order to be ready, I suggest that you remind SF and AH of their assignment and let them know that we will need to see a draft of the design by December 6.



INTER-OFFICE  
CORRESPONDENCE



M.L.M. notes

HLZ file

Nativ Policy and Planning Consultants  
Jerusalem, Israel.

נתיב-יועצים למדיניות ותכנון  
ירושלים

Tel.: 972-2-662 296; 699 951  
Fax: 972-2-699 951

FACSIMILE TRANSMISSION

URGENT

TO: Henry L. Zucker  
FROM: S. Fox, A. Hochstein  
FAX NUMBER:

DATE:

21/11/89

NO. PAGES:

11/8

Dear Hank,

Seymour will call you at 8<sup>15</sup> AM your time. Enclosed is a paper on the mechanism for implementation (IFE) and the recommendation that will appear on this topic - in the materials for an December 6 meeting. Seymour will discuss this with you at 8<sup>15</sup>.

Best regards

J. Amich

Excellent - see comments

November 21, 1989

Dear Hank,

Here is the recommendation for the mechanism for implementation that will be included in the background materials for the meeting of the Senior Policy Advisors.

#### RECOMMENDATION ON THE MECHANISM FOR IMPLEMENTATION

The Commission recommends the establishment of a mechanism that will undertake the implementation of its recommendations. It will be the driving force in the attempt to bring about across-the-board, systemic change for Jewish education in North America.

The mechanism will facilitate the establishment of Community Action Sites, encourage foundations and philanthropists to support excellence, innovation and experimentation; facilitate the implementation of strategies on the Continental level and in Israel; assist in the planning and development of programmatic agendas; help to develop the research capability in North America and prepare annual progress reports for discussion by the North American Jewish community.



November 21, 1989

## The Mechanism for Implementation

### 1. Background

---

The Commission on Jewish Education in North America decided, at its meeting on October 23 1989, to undertake a plan of action aimed at significantly affecting the impact of Jewish education in North America.

The plan includes the following elements :

1. **Mobilizing the Community** (leadership, structure, finance) for implementation and change.
2. Developing strategies for **building the profession of Jewish education**, including recruitment, training and retention.
3. Establishing and developing **Community Action Sites** to demonstrate what Jewish education at its best can be, and to offer a feasible starting point for implementation.
4. Implementing **strategies on the continental level and in Israel** in specific areas—such as the development of training opportunities or recruitment programs to meet the shortage of qualified personnel.
5. Developing an **agenda** for programmatic options and an approach for dealing with them.
6. Building a **research capability** to study questions such as the impact and effectiveness of programs.
7. Designing a **mechanism for implementation** that will continue the work of the Commission, as well as initiate and facilitate the realization of the action plan.



Draft for Discussion Only - Not for Quotation

## II. The Challenge

The challenge facing the Commission at this time is to create the conditions for implementation of its plan and to launch the process that will bring across-the-board change. Briefly stated the Commission needs to decide who will do all of this and how it will be done.

The action plan, the implementation of the recommendations of the commission, will require that some mechanism be created to continue the work of the Commission after its report is issued.

The mechanism for implementation may be a new organization or part of an existing organization. It will be a cooperative effort of individuals and organizations concerned with Jewish Education, as well as the funders who will help support the entire activity. Central communal organizations - CJF, the JWB and JESNA - will be full partners in the work. Federations will be invited to play a central role and the religious denominations will have to be fully involved.

The relationship between this central mechanism and local communities or individual institutions involved in the implementation of the recommendations of the Commission - in particular the implementation of Community Action Sites - will be based upon a number of principles:

- sequence:*
- 1 • Ready-made plans will not be offered or imposed upon communities. Rather the mechanism will act as facilitator and resource for local initiatives and planning. ~~Commissioners have warned against "top-down planning"~~
  - 2 • The mechanism will act when invited by a community that wishes to become a Community Action Site.
  - 4 • Participating communities and institutions will set up <sup>a</sup> their own local planning and implementation mechanism, that will take responsibility for the work.
  - 3 • The work will be guided by agreed-upon criteria such as pluralism, accountability and the highest professional standards.
  - 5 • ONLY A FEW COMMUNITY ACTION SITES should be undertaken at the outset.

## III. The Suggested Mechanism for Implementation

### A. Mission

1. The mechanism will be charged with carrying out the Action plan decided upon by the Commission, and ~~bring~~ about implementation of the Commission's recommendations. It will be a free-standing unit for the initiation and promotion



of change and innovation in Jewish education. ~~As such, it should be a center guided by vision, together with rigorous work and creative thinking. If successful, it will be a driving force for implementation and change, a source of ideas, characterized by an atmosphere of ferment, search and creativity.~~

2. It will design and revise development strategies - generally in concert with other persons, communities and institutions. It will be a full-time catalyst for development efforts for Jewish education. <sup>3</sup> It will not deliver services, nor will it compete with existing organisations. Part of its mission will be to help EXISTING institutions and organisations rise to their full potential.

### B. Governance and Relationship to the Commission

The issue of the continuation of the work of the Commission and of the governance of the mechanism for implementation was addressed by Commissioners and a number of alternative suggestions were offered for consideration.

#### 1. Governance:

- a. The mechanism will have an active Board, which will set policy and accompany the decisions and work of the mechanism - on an ongoing basis.
- b. The mechanism will have a small <sup>Highly Qualified</sup> outstanding professional staff to carry out its mission.
- c. The work of the mechanism will be guided on an ongoing basis by the vision, the educational content and the philosophy contained in the final report of the Commission. In addition, the work of the mechanism will be enriched through consultations with institutions, scholars, rabbis, educators and community leaders, ~~throughout the world~~. A Professional Advisory Team will be established to stimulate this activity.
- d. The authority of the mechanism will derive from the ideas that guide it, and the prestige, status and effectiveness of its Board and staff.

#### 2. Continuation of the Work of the Commission

Many Commissioners have expressed an interest in retaining an active involvement in the work of the Commission - after the final report is issued.

<sup>T&D</sup>  
Three possible scenarios have emerged to date:

1. The mechanism could be viewed as heir to the Commission - as its successor in charge of implementation. In this case the Board of the mechanism would



be composed of some of the Commissioners interested in being actively involved in implementation, in addition to other members.

- 2/ Many Commissioners have expressed the desire that the Commission continue to exist. In this case, the full Commission would continue to work in addition to the mechanism. The Commission would convene twice or three times a year to discuss the work of the mechanism, review its agenda and consider progress of implementation.

- 3- A third possibility  
3- A third possibility, similar to the second, would have the Commission convene once a year, possibly in an enlarged format, and become a major communal forum on Jewish education. This forum would review progress on implementation, might be accountable to by the mechanism, and review reports on the state of the field of Jewish education in North America.

C. Tasks & Functions

1. The mechanism will undertake the following tasks:

- a. To initiate and facilitate the establishment of several community action sites. This may involve developing criteria for their selection, assisting communities as they develop their site, lend assistance in planning, ensure monitoring, evaluation and feed-back. Each site will have its local mechanism - whether this be a commission, a planning unit or some other suitable structure, that will plan and implement the community action site and undertake responsibility for it.
- b. To facilitate implementation of strategies on the continental level and in Israel. This may mean encouraging institutions that will plan and carry out the development efforts. For example: the mechanism may commission the preparation of a national recruitment plan or a national training plan; it may lend planning assistance to existing training institutions as they undertake expansion and development of their training programs; it may help secure funding for these.
- c. To offer assistance as required for the planning and development of programmatic options by others. The mechanism will serve as consultant, help design a development process, recruit staff, gather experts who might bring best practice and other knowledge and data to the planning process for programmatic options. It will thus assist foundations, institutions and organizations that want to undertake work in a programmatic area.
- d. To help develop the research capability needed in North America for the development of more informed policies concerning Jewish education.



- e. To prepare annual progress reports for public discussion of the central issues on the agenda of Jewish education.
  - f. To facilitate the development of a network of existing Commissions for Jewish education/Jewish continuity, local mechanisms of the various Community Action Sites and other relevant organisations, for the promotion of change and the diffusion of innovation.
- AND ENHANCE THE EFFECTIVENESS*

2. In order to meet these complex tasks, the mechanism will undertake the following functions.

- a. research, data collection, planning and policy analysis;
- b. community Interface (mainly for demonstration sites);
- c. funding facilitation;
- d. monitoring, evaluation and feedback;
- e. diffusion of innovations.

*a. Research, data collection, planning and policy analysis*

- \* This may be viewed as the research and planning arm of the mechanism. It will improve and maximize the knowledge-base upon which decisions are taken for the implementation of the report. The work may be commissioned, performed in-house or other institutions may be encouraged to do various parts. The necessary data bases will be created here; major issues will be studied, key questions will be researched. (e.g. inventories of Jewish educational resources may be developed; analyses of needs and wants in the community will be undertaken; work on setting norms and standards for training will be initiated; the quality of existing training will be assessed and alternative models considered; etc.).
- \* To provide the analysis needed for informed decisions. (E.g. What are relevant criteria for the selection of Community Action Sites? What is the nature of the problem/s in that site? What are the political and institutional givens relevant to change in Community Action Sites? Who are the stakeholders and how can they be involved? What are the financial and funding possibilities?)
- \* To provide the knowledge and planning support needed and wanted by the Community Action Sites; to work with the local mechanism in Community Action Sites and provide expertise that may be needed; to help ensure the level and quality of the work intended.



- To be the arm of the mechanism for planning and strategic thinking.
- It is here that development plans will be designed and strategies will be defined and revised on an ongoing basis. This work will extensively involve other persons and institutions. It is a different activity from that of facilitating the setting up of a North American research capability—but it may provide some of the initial impetus.

*b. community interface (for Community Action Sites)*

- The mechanism will work extensively with the communities where Community Action Sites are located. This complex function will include negotiation over criteria, modes of operation, the establishment of local structures for planning and implementation, funding and more. It will be undertaken in cooperation with the local mechanisms that will be established in Community Action Sites.

The community interface function may deal with:

- Initiation of negotiations with relevant stakeholders and community leaders who want to establish a Community Action Site.
- Help the local community establish a mechanism for its Community Action Site and assist in recruiting staff for such mechanism.
- Carry out ongoing facilitation during implementation—as needed (e.g. assistance in negotiations with national training institutions, universities, organizations, etc.). The mechanism staff will be pro-active in its support of the local management of the Community Action Sites. Relevant mechanism staff will maintain ongoing contact with the local team.

*c. funding facilitation*

This function may include the following:

- To undertake as appropriate, brokering between various possible sources of funding (foundations, national organizations, local sources of funds, federations, individuals) and the Community Action Sites.
- To be a central address both for funding sources and for relevant institutions who will seek guidance in accomplishing their objectives.
- To assist funders in moving ahead with programmatic options in which they have an interest, acting as a consultant, and providing professional assistance as appropriate.
- To develop long-term funding strategies with all relevant stakeholders.



*d. monitoring, evaluation and feedback*

The purpose of this function is threefold:

- \* To monitor activity of each Community Action Site and all other elements of the Implementation plan.
- \* To evaluate progress – in whatever form or forms deemed most useful.
- \* To create and activate feedback loops to connect practical results with a process of re-thinking, re-planning and implementation.

*e. diffusion of innovation*

The goal of the Commission on Jewish Education in North America is to bring about across-the-board systemic change in Jewish education in North America, by initially dealing with the areas of personnel and the community. The mechanism will deal with the complex issue of the diffusion of Innovation from one or more Community Action Sites, from programmatic undertakings and from Continental developments, to many or all communities. Strategies will be devised to maximize change throughout the community.

