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Series C: Council for Initiatives in Jewish Education (CIJE). 1988–2003.

Subseries 1: Meetings, 1990–1998.

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Barth, Karen. Meeting. 18 November 1996, 1996.

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**MLM/ADH/KAB
MEETING 11/18/96**

AGENDA

	<u>Supporting Materials</u>
1. Work Plan	#1
2. Budget	#2
3. Fundraising	- Update #3
	- Bill Berman letter #4
	- 1996 Cash Flow
4. Control Function	- Cleveland to NYC
	- Karen Jacobson's role #5
	- SA and Steering Committee
5. Approvals revisited - KAB/JM, KAB/ADH	#6
6. Policy Changes	#7
7. Office Space - 15 E. 26th St., 18th Floor	#8
8. Board Structure	- General Principle #9
	- Morris Offit follow up #10
9. JCCA/CIJE - Jewish education plan	
10. JEWEL - next steps	
11. CAPE	- TEI/goals
	- Senior Personnel Plan for U.S.
	- Danny Gordis
12. Brandeis University	#11
13. Aryeh Rubin	
14. Dec. 5 Steering Committee Agenda	#12
15. Wexner	
16. Hirschhorn Proposal	#13

CAB — MCM/ADH/KAS Meeting, November 18th 1997.

AGENDA

Supporting materials

1. Workplan # 1
2. Budget # 2
3. Fundraising ~~update~~ ~~1997~~ # 3
 - Bill Benman letter # 4 *perman letter.*
 - 1996 Cash Flow
- ~~Office space~~ 1
4. Control function — CLE to NYC
 - KJ role →* — Sheila & Steeny cke
 * S.K.J. résumé
5. Approvals resubmitted — KAS/Josie # 6
6. Policy changes — KAS/ADH. # 7
7. Office space — 15 & 26 # 8
8. Board structure — General principles. # 9
 - Morris & H. follow-up # 10
9. JCCA/CIP — *Jewish education* Planning plan
10. JEWEL — next steps
11. CARE — ETEI/Goals? # 11
 - Senior Personnel Plan for U.S.
 - Danny Ford

Brandeis University

#10

Sanford

~~Werner report~~

R. Ruyen Rubin

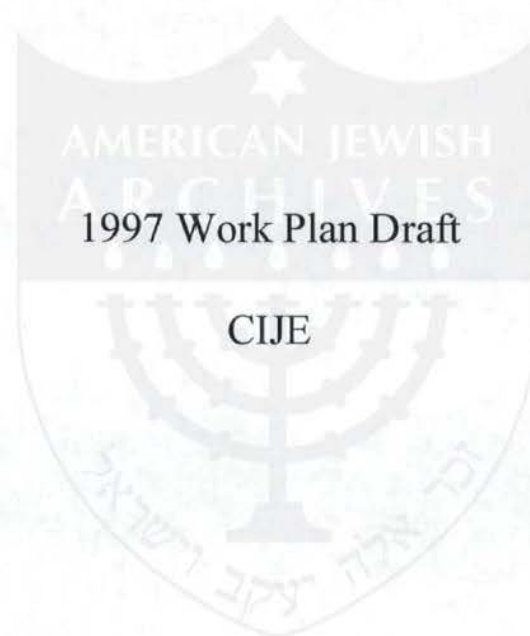
13. ~~Steens~~
Dec. 5th Steen ctee
agenda.

14. Werner ~~report~~

15. Hirschhorn proposal

#12

November 15, 1996



For Discussion November 18, 1996

WORK PLAN HIGHLIGHTS

- Complete a five-year strategic plan for CIJE
- Continue to build and refine our training pilots for teacher educators and principals
- Consult to new and existing program in professional development for educators
- Expand the Goals Project and conduct several pilots
- Create an extensive array of publications designed to:
 - Tell the CIJE story
 - Seed the culture with powerful ideas
 - Support policy-making with research
 - Provide tools for change
- Continue to support our lead communities while preparing for a major new initiative in Community Mobilization (to be defined as part of the Strategic Planning process)
- Disseminate and utilize our Best Practice work
- Continue to expand capacity by adding to staff and by creating a cadre of General Education professors to help with our work
- Cut back on time devoted to core activities
- Do intensive planning for 1998 initiatives in:
 - Early Childhood
 - Senior Educational Leadership
 - Research and Development
 - Governance Structure

WORK PLAN SUMMARY BY DOMAIN

DOMAIN	SUMMARY AND APPROACH
Building the Profession	Continue to refine and expand pilot training programs for teacher educators and principals; solidify the professors group; plan major initiatives for 1998
Community Mobilization	Maintain on-going relationships with lead communities, national organizations, and key lay leaders; broadly rethink our strategy in this area
Content and Programs	Run several pilots of the goals project, while undertaking a planning effort in this area; disseminate Best Practice materials and integrate them into our training institutes and programs
Monitoring, Evaluation, and Feedback	Continue rigorous monitoring and evaluation of TEI; use data from prior surveys to develop policy briefs; begin serious planning for building research and evaluation capacity
Publications	Develop an extensive array of publications; create a long term publications strategy; develop a database to support dissemination
Core	Complete a five-year strategic plan; rethink board strategy

DOMAIN: BUILDING THE PROFESSION

Category	Description	Responsibility	Complete By	Objective
TEI	Run 4 seminars for cohorts 1 and 2	GZD	Mar, Apr, Jun, Dec	Continue to refine and expand pilot project in teacher education while creating a cadre of teacher educators for congregational schools
	Start Cohort 3	GZD	Aug, Dec	
	Set up a network of TEI participants	NH	Dec	
	Create 4 video packages	GZD	Jan, Mar, Jun, Aug	
	Write the TEI story	GZD	Dec	
	Complete 1st phase of TEI evaluation (community map)	AG/EG/BR	Feb	
Lay/Professional Leadership Seminar	2 short lay/professional leadership seminars	GZD	Jan, Apr	Experiment with cooperative lay/professional leadership development
Leadership Seminar for Principals	1 five-day professional leadership seminar	GZD	Nov	Continue to refine pilot project in Educational Leadership
Build Capacity/Professors	3 day seminar in January	BDH/GZD	Jan	Continue to grow the group and to solidify their relationship with CIJE and their interest in Jewish education
	5-day spring seminar	GZD/NEW	Jun	
	Recruit new professors	GZD/NEW	Dec	
	Fold professors into CIJE work	GZD/NEW	Ongoing	

Planning	National Center for Jewish Educational Leadership (JEWEL)	KAB	Oct	Develop plans for initiatives to be implemented beginning in 1998
	Senior Personnel Planning	KAB	Oct	
	Norms and Standards	NEW	Dec	
	Early Childhood	NEW	Dec	
Consultations	Consultations on Professional development with: Brandeis, Torah Umesorah, Day School Training Initiative, Florence Melton Adult Mini-School, Melton Israel Short term program, Orthodox day school principals	GZD/BDH/ NH	Ongoing	Support the creation of new models in Professional Development
Professional Development Policy Brief	Combine what we've learned about Professional Development in General Education with what we know about Professional Development in Jewish Education to create a policy brief	GZD/BDH	Oct	Develop policies that can be adopted by communities to markedly improve Professional Development of teachers and educational leaders

DOMAIN: COMMUNITY MOBILIZATION

Category	Description	Responsibility	Complete By	Objective
Community Consultations	Work on development of personnel action plans	GZD	Ongoing	Experiment with mobilizing communities around the importance of professional development, goals and evaluation
	Support pilot projects in lead communities e.g. Milwaukee leadership, Beth Israel, Atlanta-early childhood	NR/GZD/BDH	Ongoing	
	Support evaluation efforts with lead communities	EG/AG	Ongoing	
Relationships with National Organizations	Continue to meet with and maintain relationship with key national organizations (e.g. movements, federations, JESNA)	KAB/NR	Ongoing	Build the reputation of CIJE and maintain relationships that enable us to work in partnership with others
Luncheon Seminars	Offer six luncheon seminars presenting "big ideas"	NR	Jan-Dec	Build a community of academics and policy makers in Jewish education/continuity in the New York area
Board/Steering Committee Board Seminar	Rethink how we use our Board meetings as a vehicle for community mobilization	KAB	Jun	More effectively stimulate and energize lay and professional leaders to be informed advocates of Jewish education
	Touch base in a meaningful way with all of our Board members	KAB	Jun	

DOMAIN: CONTENT AND PROGRAMS

Category	Description	Responsibility	Complete By	Objective
Dissemination of Best Practice Materials	Implement plan to further disseminate Best Practice materials	BDH/NR	Jun	Build awareness of our work and ensure that people outside of CIJE can make use of the Best Practice work that we have done.
Use Best Practice materials in our work	Integrate learning from Best Practice work into TEI, Harvard Leadership, Milwaukee Leadership Project, and Professors project	BDH	Ongoing	Ensure that we are fully utilizing our Best Practice materials in all of our institutes and programs.
Goals Project	Milwaukee and Beth Israel Pilots	DP	Ongoing	Create models of change at community level; expand our understanding of the process of change; develop tools and case studies for use in change efforts, community mobilization and training
	Goals Publications	DP/NR	Dec	
	Plan for future expansion of Goals Project	DP	Apr	
	Form a network of leaders engaged in building institutions	NEW	Dec	

DOMAIN: PUBLICATIONS

Category	Publication/Description	Responsibility	Completed By	Objective
Telling the CIJE Story	Current Activities	NR	Ongoing	Let others in the Jewish community and the wider community know about CIJE and its work.
	Annual Report	NR	Feb/Dec	
	TEI story	GZD/NR	Dec	
Seeding the Culture with Powerful Ideas	Hartman on Covenant and Community	NR	Mar	Help create the cultural changes needed for further education revitalization
	Hoffman on Synagogue Transformation	NR	Mar	
	April Board Seminar	NR	Oct	
Research for Policy	Professional Development Policy Brief	NR/BDH	Oct	Provide the facts necessary to shape policy
	Leaders Report	NR/EG/AG	Feb	
	Early Childhood Policy Brief	NR/GZD	Dec	
Tools for Change	The Place of Vision in Jewish Educational Reform	DP/NR	Dec	Create tools for use in mobilizing communities and institutions for change, and for training professional leadership
	From Philosophy to Practice: Case Study of the Agnon School	NR	Jun	

Strategy	Develop a longer term strategy for CIJE publications	NR	Jun	Clarify longer term approach to publications
Database	Develop dissemination database	NR	Apr	Facilitate distribution of published material and other mailings



DOMAIN: MONITORING, EVALUATION, AND FEEDBACK

Category	Description	Responsibility	Complete By	Objective
Ongoing Evaluation of TEI	Observations and follow-up interviews	EG/AG/BR	Ongoing	Gather data that can be used to evaluate the effectiveness of the TEI pilot project and to provide evidence to support the spinoff of this project
	Write one year report and interim case studies of communities	EG/AG	Oct	
	Present to communities	GZD	Dec	
Ongoing Community Consultations	Advise communities on evaluation issues as they arise	EG/AG	Ongoing	Continue to build evaluation into the culture of our Lead Communities
Build Research Capacity	Engage in discussions with opinion research centers about including new questions in planned research	EG/AG	Dec	Begin thinking about an infrastructure for Research in Jewish Education
Build Evaluation Capacity	Develop a plan for an Evaluation Institute	EG/AG	Oct	Create an implementable plan for building an evaluation capacity at the community and national level

DOMAIN: CORE

Category	Description	Responsibility	Complete By	Objective
Strategic Plan	Develop a five-year strategic plan to guide our future work, planning and decision making	KAB	Apr	Take a more vision-driven, more strategic approach to our work
Staff Meeting and Internal Planning	Continue to meet regularly with core staff only	KAB	Ongoing	Improve the time-efficiency of meetings and planning activities
	Start work planning in May/June	KAB	Oct	
Fundraising	Create and adhere to a rigorous fundraising schedule	KAB	Oct	Complete 1997 fundraising by October 1

PLAN FOR BUILDING STAFF CAPACITY

NAME	PERCENT OF TIME	JOB POSITIONS FOR 1997	LONG TERM JOB DESCRIPTION
Alan Hoffmann	Half time through August	Executive Director	Consultant/Advisor
Karen Barth	80%	Senior Consultant/Executive Director	Executive Director
Gail Dorph	100%	Senior Education Officer	Director of Building The Profession Domain
Nessa Rapport	100%	Director of Publications	Director of Communications
Barry Holtz	60% through August	Part-time Consultant	Director of Content and Programs
(new)	100%	Chief Administrator and Financial Officer	Chief Administrator and Financial Officer
Nellie Harris (new)	100% after August	Education Officer	Manager of all ongoing BTP Programs
Building the Profession (new)	100%	Education Officer	Assistant with building future programs
Bookkeeper (new)	100%	Data entry and Reconciliations	Data entry and Reconciliations
Ellen Goldring	30-40 days	Consultant - Research and Evaluation	Consultant - Research and Evaluation
Adam Gamoran	30-40 days	Consultant - Research and Evaluation	Consultant - Research and Evaluation
Bill Robinson	100%	Field Evaluator	Field Evaluator

Career Objective

Management Consulting position emphasizing a systems approach to organizational development and change management in order to optimize human resources productivity for an organization in the greater New York metropolitan area.

Qualifications and Background

Over ten years Organizational Development experience. A unique combination of training in Organizational Psychology and graphic communications. Proven track record in research and survey design; work team formation; training and curriculum development; diversity programming; staff morale and organizational effectiveness. Experienced with fortune 500 and non-profit organizations. MA in Industrial/Organizational Psychology.

Demonstrations of Effectiveness

Developed and implemented action plan to enable organization to adapt to changing demographics. Targeted new markets, hired and trained new staff; conducted retaining program for current staff. Results: Increased departmental revenue by 25%; expanded organization membership by 10%; improved staff productivity, and morale.

Led senior management of a service organization to implement a strategic change in operations. Increased interdepartmental cooperation; improved lateral and hierarchical communication; established cross department teams; integrated and cross utilized staff and professionals. Results: Expanded programming and services 50%; decreased redundant expenditures by 30%.

Restructured national survey of Fortune and Service 500 for a nationally recognized business consulting agency. Analyzed instrument, determined reliability and validity; identified problem areas; defined options; redesigned graphics and layout focus to reach target population; prepared and delivered final product. Results: Increased predicted 2% response rate to an achieved rate of over 15%. Survey results distributed nationally as part of a published study to the Fortune and Service 500, the media and other research organizations.

Conducted pilot study to analyze administration and delivery of health care services, to enhance interdisciplinary team effectiveness. Developed case histories of coordinated health care team management programs; reviewed physician and nurse training procedures; interviewed professionals to assess work team dynamics. Results: Created instrument and coded results to provide feedback for professional training, and advise industry on cost cutting alternatives.

Promoted system wide change in work flow procedures for an Architectural company. Redesigned procedures to facilitate the computerization of tasks; set-up electronic financial records, coordinated office accounting and payroll operations. Results: Eliminated overtime, improved accounts receivable tracking, and increased reliability of client billings.

Experience

- 1990-96 **Catalyst**
Management Consultant - Organizational Development Consulting, Change Management, Diversity Consulting, Survey Research, Survey Design, Project Organization, Data Analysis.
SUNY Downstate Medical Center
Management Consultant - Organizational Development, Change Management, Policy Consulting, Work Team Relations, Project Implementation, Primary Research, Survey Design.
Four Degree Design
Principal - Product Development, Design, Marketing, Contract Negotiation, Strategic Planning, Patent Licensing.
BumpZoid
Personnel Administrator - Financial and Systems Management, Compensation and Benefits Administration.
- 1990-93 **Marymount Manhattan College**
Instructor in Personnel/Organizational Psychology - Lectured on Organizational Structure and Design, Corporate Culture, Human Resources Management, Collective Bargaining, EEO Compliance, Job Design, Performance Analysis, Worker Motivation, Work Team Formation, Leadership Training.
- 1989-90 **H Plus, Inc.**
Office Manager - Data Management, Payroll, Purchasing, Graphic Design Research, Desk Top Publishing.
- 1985-89 **Associated Y's of New York**
Director of Cultural Affairs - Internal Consulting, Change Management, Curriculum Design, Diversity Training, Staff Training and Development, Programming, Media Relations, Recruited and Supervised Permanent and Special Projects Staff of 100, Committee Leadership, Budget and Strategic Planning.
- 1983-85 **JASA**
Assistant Program Director - Hired and Supervised Staff for forty Satellite programs, Implemented Policies and Procedures, Program Development, Community Relations, Committee Development, Public Relations, Training and Development, Work Team Formation, Budget and Strategic Planning, Fundraising, Grant Writing.

Computer Skills

Experienced in the use of computers for word processing, spreadsheets, desktop publishing, accounting and graphics in both Macintosh and IBM PC environments.

Education

- 1993 **MA Industrial/Organizational Psychology**, Brooklyn College, City University of New York; Recipient of *Psychology Scholarship for Academic Excellence*.
- 1981 **BFA** Pratt Institute; Cum Laude.

InterOffice Memo

To: Sheila Allenick, Financial Manager CIJE
From: Morton L. Mandel
Date: November 7, 1996
Subject: Authorization

This will authorize Karen Barth to be one of two approvers of invoices



AMERICAN JEWISH
ARCHIVES

1 cc to
Seldon
original Back
to SFA.

NOTE - SELDON
SFA IS THE 2nd APPROVER.

1) JOSIE
2) SHEILA P.2

Memorandum

DATE: December 6, 1995
TO: Mort Mandel
FROM: Sheila Allenick *Sheila*
RE: CIJE Approvals
CC: Josie Mowlem/Alan Hoffmann

Budget
Approvals

Alan has recommended certain changes to the approvals list based on the addition of Josie to the CIJE staff. Attached are the revised and original lists. Please consider whether it is still appropriate to have Stu Neidus as an approver for tax, legal and auditing expenses.

file:g:\users\philanth\sheila\cije\approval

SHEILA / JOSIE
Approved today by
MIM WITH CHANGES
IN HIS HANDWRITING.
Sheila - please bring
document out again
with MIM's changes.
No need for him to
see again.
12/14/95

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION
APPROVALS LIST



Mort Mandel

M. L. MANDEL





21 Dec '95

Date approved

Council for Initiatives in Jewish Education (CIJE)
Approvals List

Effective date: 11/20/95
Date Prepared: 11/20/95
Page 1 of 3

	ITEM	APPROVAL REQUIRED		
		PRIMARY	JOINT WITH	FINAL
I.	<u>ANNUAL BUDGET</u>			
	A. Current Year Budget	ADH		MLM
	B. Changes to Budget - Under \$10,000	ADH		
	C. Increase To Budget	ADH		MLM
II.	<u>OPERATING STANDARDS</u>			
	A. Travel	ADH	As of 3/1/96 JM/ADH	MLM
	B. Meetings/Conferences	ADH	JM/ADH	MLM
	C. Telephone Expenses	ADH	JM/ADH	MLM
III.	<u>PERSONNEL</u>			
	A. Replacement Requisitions			
	1. Clerical	JM		
	2. Professional	ADH		
	B. Additions to Staff			
	1. Clerical	JM		
	2. Professional	ADH		
	C. New Hire Compensation (Starting Salary)			
	1. Clerical	JM		ADH
	2. Professional	ADH		MLM
	D. Termination			
	1. Clerical	JM		ADH
	2. Professional	ADH		MLM
	E. Leave of Absence	JM		ADH
	F. Temporary Help	JM		

	ITEM	APPROVAL REQUIRED		
		PRIMARY	JOINT WITH	FINAL
III. cont.	G. Compensation Changes			
	1. Approval of Compensation Budget			
	a. Clerical	JM	ADH	MLM
	b. Professional	ADH		MLM
	H. Severance Arrangements	ADH		MLM
	I. Travel Advance - Temporary	SFA		
	J. Travel Expense			
	1. Alan Hoffmann			MLM
	2. All others	ADH (JM in 3/96)		
	3. Josie Mowlem	ADH		
IV.	<u>CONSULTANTS</u>			
	A. Authorization to Use	ADH		
	B. Payments Within Approved Authorization Form	SFA		
V.	<u>CAPITAL REQUESTS</u>			
	Note: All capital requests require financial review prior to purchase. Two bids or estimates must be obtained for any expenditure over \$1,000.			
	A. Standard items	JM		
	B. Non-standard items	ADH		
VI.	<u>DISPOSAL OF EQUIPMENT</u>	JM		
VII.	<u>PURCHASE OF OFFICE SUPPLIES, ETC.</u>			
	A. Standard items	JM		
	B. Non-standard items	ADH		
VIII.	<u>ASSOCIATION OR MEMBERSHIP DUES.</u>	JM		
	<u>SEMINARS, CONVENTIONS, &</u>			
	<u>SUBSCRIPTIONS - IN BUDGET</u>			

	ITEM	APPROVAL REQUIRED		
		PRIMARY	JOINT WITH	FINAL
IX.	<u>MISCELLANEOUS</u>			
	A. Any Verbal or Written Communication to Outsiders, the Press, etc.	ADH		
	B. Use of Secretarial Services Within Pre-Established Guidelines	JM		
	C. Meeting Expenses Within Guidelines	JM	SFA	
X.	<u>LEGAL, TAX AND PROFESSIONAL</u>			
	A. Tax Matters	SFA	SDN	
	B. Legal Contracts	ADH	RAS/SDN	
	C. Auditing	SFA	SDN	
XI.	<u>ADDITIONS OR CHANGES TO THIS APPROVALS LIST</u>	ADH	RAS	MLM

LEGEND:

MLM - MORTON MANDEL
ADH - ALAN HOFFMANN
RAS - RICHARD SHATTEN
SDN - STUART NEIDUS
SFA - SHEILA ALLENICK
JM - JOSIE MOWLEM

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PROPOSED NEW POLICY

FOR INSERTION IN: CIJE OPERATIONS MANUAL

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
TRAVELING IN U.S. AND CANADA

no. 2.1
effective
supersedes 10/27/94
page 1 of 14

I. OBJECTIVE

Managing our activities in an efficient and economical manner, without "frills," is a basic principle for CIJE which applies to every facet of our operations. All travelers are asked to be cost-conscious in their travel planning and to ensure that lodging, meal expense, car rental agencies, and airline carriers meet our standards. Our objective is to keep travel expenses cost effective, as well as to be practical and logical. ^

II. AUTHORIZED TRAVEL AGENT

The designated authorized travel resource should be used for travel planning, reservations, and ticketing.

III. EXPENSE REIMBURSEMENT

A. Reimbursement of Expenses

The CIJE reimburses travelers for legitimate travel expenses incurred on authorized trips. In most cases, expenses are paid by the person incurring them, and then reimbursed when the Travel Expense Statement (CIJE 02) is approved by your designated approver.

B. Travel Expense Statement

1. Travel Expense Statements must be completed in ink (CIJE 02). Numbered receipts for expenditures should be attached to the ~~back of the~~ Travel Expense Statement. The numbers should correspond to amounts on the expense statement. *taped to 8 1/2 x 11 paper*
2. Travel Expense Statements should be submitted for approval on a weekly or no later than monthly basis, depending on your travel schedule. Nominal amounts (less than \$25) can be accumulated and submitted monthly.
3. Fill out travel reports completely. Expenses will not be reimbursed when a report is incomplete.
4. Unauthorized expenses will be deducted automatically. The traveler will be notified of the amount and reason for the deduction. ^

C. Travel Expense Reimbursement Standards

Periodically, the travel expense reimbursement standards are reviewed to ensure that they are reasonable. In this review process, data on travel costs is gathered from government and private sources. This data is used to update the travel standards.

D. Temporary Travel Advances

1. Temporary travel advances are available to those who travel only occasionally, and are limited to the estimated cost of the trip.
2. Temporary travel advances may also be obtained when airline rules require that tickets must be purchased 21 days or more prior to the date of travel.
3. When submitting a Travel Expense Statement in which a temporary advance was used, complete and process the form in the normal manner. Deduct the travel advance from the amount due you. If the advance was greater than the actual cost of the trip, a check for the difference made payable to CIJE must be attached to the Travel Expense Statement.
4. Temporary travel advances may be obtained through your supervisor on request.

IV. AIR TRAVEL

- A. All air travel will be on commercial lines at the coach rate. Use of private aircraft or charter airlines is not permitted. Least Cost Routing should always be used.
- B. The back-to-back ticketing technique should be used to obtain discounted air fares when a traveler knows in advance that there is a need to repeat a trip between cities. Back-to-back ticketing is defined as the purchase of two tickets covering travel to the same city on two different occasions. All back-to-back tickets will be billed directly to the CIJE by our travel agent. Therefore, no reimbursement for these airline tickets is expected. See instructions for completing CIJE 02, No. 5 for reporting such expenditures.
- C. Charges for excess baggage are not reimbursable unless the excess baggage is extra equipment required for a specific assignment.
- D. Travel To and From the Airport

Travelers are expected to utilize the most logical, and practical, least-cost method of travel to and from the airport.

V. GROUND TRANSPORTATION

A. Travel by Private Car

1. When it is appropriate to use your personal car for CIJE business, a mileage/kilometer allowance (see authorized rates on Exhibit B) is authorized to cover all expenses except for:
 - a. Toll charges - reimbursed at actual cost.

- b. Parking - reimbursed at actual cost. At airports, daily charges are not to exceed the maximum long-term daily rate at the airport.

B. Receipts

1. A receipt for paid ground transportation (bus, courtesy van, taxi, etc.) is required when the expenditure for any one occurrence exceeds \$10.00.
2. A receipt for parking charges and toll charges over \$4.00 is also required.
3. As a general rule, obtain receipts wherever practical to do so.

C. Other

1. Expenses incurred for commuting before 6:00 a.m. and after 7:00 p.m., and on weekends, will be reimbursed. Receipts should clearly show the time traveled and a note should be added by the traveler indicating business purpose.
2. Expenses incurred for work related travel during the normal work day will be reimbursed.
3. Expenses incurred for work related travel during normal commuting time will be reimbursed only if an adequate business explanation is provided.

VI. CAR RENTAL

A. Reservations

All rental car reservations must be made through our authorized travel agent. Generally, a compact car will be rented. Exceptions should be documented.

B. Insurance

When renting a vehicle, you should always take the collision damage waiver coverage and waive all other coverages.

C. Gasoline

Gasoline purchases for a rental car are to be added to the vehicle cost and entered as a single total recorded in the "Car Rental Expense" block. Travelers are asked to fill up rental cars when returning them, to avoid incurring the excessive gasoline charge made by rental companies. When this is not possible, the reason should be documented.

ADDED

KB

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the gas tank of

VII. HOTEL ACCOMMODATIONS*and the cost exceeds that of the approved hotel*

- A. All travel reservations for accommodations should be made using an approved hotel chain (Exhibit C) or a Federation recommended hotel (Exhibit C). *If this is not possible the accommodations must be approved in advance by the Executive Director.*
- B. Single, minimum rate rooms will generally be used.
- C. Charges are to be paid by you upon checking out. They should not be billed to the CIJE, unless you have been advised otherwise.
- D. Note: *CJE does* ~~We do~~ not provide reimbursement for any "guaranteed reservations" that were not cancelled due to your error.
- E. Laundry and valet expenses are reimbursable if you are away from home on CIJE business at least six consecutive days.

VIII. MEALS*four**KB*

- A. The actual amount spent on meals is reimbursable up to the maximum limits listed in Exhibit B. Tipping is not separately reimbursable as it is covered in the meal allowance.
- B. Please note that there are three levels of meal expenses and the most frequently visited cities are included under the appropriate expense level.
- C. Meal costs must be itemized daily on your Travel Expense Statement. All personal meals and all outside guest meals require a receipt. Tips to a maximum of 15% should be added to the receipt when they are not included.
- D. Reimbursement for meals is only authorized when you are away from home overnight or in the following instances:
1. BREAKFAST - When required to eat away from home due to CIJE business (i.e., meetings, training sessions, etc.)
 2. LUNCH - When you are working more than 30 miles/48 kilometers from your base office. NOTE: If you work out of your home, that is your "base office."
 3. DINNER - When you must work past 7:00 p.m. away from your home, or when performance of job duties, due to travel, prevents you from being home by 7:00 p.m. In both instances, a meal expense must be actually incurred.
- E. Meals held as a "convenience" with other CIJE personnel or consultants in your home city are not reimbursable. *However, meals within out of town staff meetings, which are necessary due to a meeting in your home city are reimbursable. The cost of meals for the entire CIJE staff during meetings is reimbursable.*
- F. ~~The consumption of alcohol creates a potential hazard to the health and safety of all. Accordingly, alcoholic beverages are not appropriate and are not reimbursable.~~

KB

- the course of*
- G. If, in ~~line with~~ *the course of* CIJE business, you dine with another CIJE employee or consultant *in your home city*, each should pay for his or her own meal except when entertaining guests (See Section IX).

IX. ENTERTAINING GUESTS

the course of
If, in ~~line with~~ CIJE business, you have a meal with other non-CIJE personnel, it may be appropriate on occasion for you to pay for the whole check.

- A. As a general guideline, the price of such meals should follow our normal meal allowances. However, this may not be practical in all situations or locations. In such instances, good judgment should be exercised, and explained on your expense report.

Note: The total cost of your meal plus your guest(s) should be entered in the "entertainment and other non-travel expenses" category on the Travel Expense Statement.

- B. Complete the "entertainment and other non-travel expenses" category on the back side of the Travel Expense Statement and include the following:

1. Date of expenditure
2. Name of establishment
3. Business purpose
4. Name, title and organization of all attendees (including CIJE employees).
5. Amount

- C. Attach a receipt showing the amount and the name of the establishment.

X. TELEPHONE COMMUNICATIONS

- A. Telephone charges should be itemized on your Travel Expense Statement by identifying the person or organization called.

- B. Direct dialing should be used to take advantage of the lower rate offered. An operator assisted call increases the cost of a phone call and should be avoided.

- C. See Telephone Guidelines (Policy number 1.7)

XI. NON-REIMBURSABLE ITEMS

The following expenses are not reimbursable, and individuals incurring them will do so at their own expense unless approved by the Executive Director:

- >
- A. Any cost associated with cellular telephones, including equipment acquisition, installation, maintenance, usage and service fees.

- B. Excess baggage charges, unless the excess baggage is equipment required for a specific assignment.
- C. Mileage/kilometer charges on personal car for personal travel.
- D. "Guaranteed" reservations that are not used and were not cancelled due to your error.
- E. Tipping for meals, as this is included in the meal allowance. #



STANDARD INSTRUCTIONS FOR COMPLETING EXPENSE STATEMENT (See Exhibit A)

Note: Travel expense Statements must be completed in ink.

- ~~1.~~ Entity/Project for CIJE related activities should always say "CIJE."
- 1 ~~2.~~ "Period Ending" should be completed with the concluding date of expenses covered in this statement.
- 2 ~~3.~~ Enter the address where the check should be mailed.
- 3 ~~4.~~ Specifically state the purpose for your travel. For example: "To meet w/consultants in N.Y., on (Date)." or, "To attend conference in Toronto, on (Date)." A domain title is not sufficient.
- 4 ~~5.~~ Enter the amount of airline tickets obtained or provided to you by the CIJE on a prepaid basis. Attach the "original passenger receipt" copy(s) and the travel itinerary provided by our authorized travel agent to the back of the statement. Indicate if this is the first or second ticket of a back-to-back set or an individual ticket-otherwise.
- 5 ~~6.~~ Note: All unused airline tickets should be attached to the front of the statement. This includes CIJE prepaid tickets as well as non-refundable tickets that were charged to the traveler.
- 6 ~~7.~~ Date of travel.
- 7 ~~8.~~ City traveled from.
- 8 ~~9.~~ City traveled to.
- 9 ~~10.~~ Amount of airline tickets which you used. *purchased directly.* Attach the passenger receipt copy(s) and the travel itinerary provided by our authorized travel agent to the back of the statement. In lieu of the original passenger coupon, attaching a clear photocopy (when possible) of the ticket with a note explaining the circumstances will be acceptable in the following situations.
 - a. When the original passenger coupon must be surrendered to the travel agent or airline to obtain credit for a ticket which was only partially used.
 - b. When "back-to-back" tickets have been obtained to qualify for discounted airline fares. In this case, the second copy of each of the two tickets will not be used until the second trip is taken. This requires that the "passenger receipt" of each ticket may not be torn out until all segments of each ticket have been used.
- 10 ~~11.~~ Total amount of personal auto expense incurred for each day as detailed on the reverse side of the statement.

- 11 12. In the event it is necessary to rent a car for CIJE business purposes, ~~a compact car will be rented through the authorized travel agent and the amount of the rental plus fuel purchased~~ entered here. The car rental agreement, gasoline receipt(s) and the travel itinerary, provided by ~~the~~ authorized travel agent must be attached to the back of the statement. See Section VI for detailed guidelines on car rental.
- 12 13. Amount of local transportation as detailed on the reverse side. *The total column on this has includes expenses for own car, rental expense and other transportation.*
- 13 14. Motel and hotel charges are to be paid for by you upon checking out. See Section VII for detailed guidelines on accommodations.
- 14 15. Meals
- Current meal standards are listed on Exhibit B.
 - See Section VIII of this policy for detailed guidelines on reimbursement of meal expenses.
- 15 16. Costs incurred for business related postage *and other non-travel expenses.*
- 16 17. Telephone
- Telephone charges should be entered here and detailed on the reverse side.
 - If no receipt is available, the calls should be listed on the reverse side of the Travel Expense Statement in the space provided as shown in Exhibit A, No. 17. *16*
- If a receipt is available, indicate the name of the person and city called next to each charge on the receipt.
- Include ^{the} original ^{telephone bill} copy of any charge card billing with the name of the person called next to each charge. *Indicate the total of all calls, less any discounts plus taxes and fees on the back. - the form will use a "reference" to the telephone bill.*
- 17 18. Amount of all other reimbursable expenses should be entered here and detailed on the reverse side. Note: Entertainment expense should be detailed as indicated on Exhibit A.
- 18 19. Daily total of reimbursable expenses.
- 19 20. Deduct the amount of travel advances you received, if applicable, and determine the amount due to or from ~~the~~ CIJE.
- If you spent more than the advance, deduct the amount of the travel advance from the total expenses and show the balance to be reimbursed.
 - If the travel advance exceeds the expenses incurred, please submit your check with your Travel Expense Statement to repay the advance.

20/21. Submitter must sign here. Submit to designated approver who will approve and submit directly for reimbursement. No expense statement will be processed if the submitter's signature is missing.

21/22. Detail expenses incurred for the use of your personal car.

NOTE: Beginning and ending daily mileage/kilometer readings must be entered on the reverse side of the Travel Expense Statement in the space provided. Always record your car's total beginning and ending mileage, for example, beginning 26,152 - ending 26,247.

22/23. Original receipts should be attached to your Travel Expense Statement. Photo copies are not acceptable.

23. Total all transportation, ~~expenses~~, communication ~~expenses~~ or entertainment expenses for the same day. This daily total is brought forward to the front of the report.

FOR INSERTION IN: CIJE OPERATIONS MANUAL

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL

EXHIBIT A

no. 2.1

effective

supersedes 10/27/94

TRAVELING IN U.S. AND CANADA

page 10 of 14



COUNCIL FOR INITIATIVES IN JEWISH EDUCATION, 15 E. 26th St., New York, NY 10010

Ph: 212-532-2360 Fx: 212-532-2646

TRAVEL EXPENSE STATEMENT

PERIOD ENDING ① 9/15/96

NAME (PRINT)	ADDRESS	CITY	STATE	ZIP
ALBERT ADAMS	123 BROADWAY ②	New York	NY	10014

NON-REIMBURSABLE AIR TRAVEL CHARGED TO CIJE

(ATTACH RECEIPTS) (SEE NOTES 1 & 2)

④ 650

④	X	BTB 1ST HALF
		BTB 2ND HALF
		OTHER

BUSINESS PURPOSE: ③ Meet with consultants regarding early childhood in Milwaukee 9/1-2
Attend conference in Toronto on research 9/9-9/10

	DATE	⑥	9/1	9/2	9/9	9/10	Scr.		
FROM:	⑦	NY	Milwaukee	NY	Toronto				
TO:	⑧	Milwaukee	NY	Toronto	NY				TOTALS
AIR TRAVEL (See Note 2)	⑨				525.00			525.00	
AUTO EXP. OWN CAR (DETAIL ON REVERSE SIDE)	⑩		14.46		15.46			29.92	
CAR RENTAL EXPENSE (INCLUDE PURCHASED GAS)	⑪								
OTHER TRANS. (DETAIL ON REVERSE SIDE)	⑫	20.00	18.50	2.50	2.50			43.50	TOTAL*
LODGING	⑬		135.00		112.00			247.00	
BREAKFAST	⑭				6.00			6.00	
LUNCH			9.50	6.75	8.00			22.25	
DINNER		22.75		17.50				40.25	TOTAL**
NON-TRAVEL (DETAIL ON REVERSE SIDE)	⑮								
COMMUNICATIONS (DETAIL ON REVERSE SIDE)	⑯	2.25	6.75			34.50		43.50	
ENTERTAINMENT (DETAIL ON REVERSE SIDE)	⑰		48.50					48.50	
TOTAL	⑱	45.00	230.71	551.75	143.96	34.50		1005.92	

REVIEWER CHECK FOR:

MATH ACCURACY

RECEIPTS

APPROVALS

NOTES:

1. Attach unused, company-paid tickets to the front of this report.
2. If this flight was not the least expensive, please explain why.
3. Attach all other receipts. Failure will delay reimbursement per Travel Policy.
4. Fill out this report completely. Expenses will not be reimbursed when a report is incomplete.

LESS ADVANCE (if applicable)

AMOUNT DUE CIJE (attach check)

AMOUNT DUE FROM CIJE ⑲ 1005.92

I hereby certify that all of the above listed expenses were authorized amounts incurred in connection with my official CIJE duties.

(Sign) ⑳

Date

Approved By: (Print)

(Sign)

Supervisor

Date

Page 11 of 14

(21)

12

 2^3

16

3)

12

[illegible]

FOR INSERTION IN: CIJE OPERATIONS MANUAL

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
TRAVELING IN U.S. AND CANADA

EXHIBIT B

no. 2.1
effective 7/01/96
supersedes 10/27/94
page 12 of 14

Exhibit B

TRAVEL ALLOWANCES
UNITED STATES

	<u>STANDARD LEVEL</u>	<u>LEVEL 2</u>	<u>LEVEL 3</u>
Breakfast	\$ 6.10	\$ 6.35	\$ 7.95
Lunch	\$ 6.10	\$ 8.50	\$10.60
Dinner	\$14.80	\$18.55	26.50
Mileage	26 cents/mile	26 cents/mile	26 cents/mile
Location	Columbus Milwaukee Nashville	Atlanta Baltimore Cleveland Denver Hartford	Chicago Boston Los Angeles New York Washington DC

FOR INSERTION IN: CIJE OPERATIONS MANUAL

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL

TRAVELING IN U.S. AND CANADA

EXHIBIT C

no. 2.1

effective

supersedes 10/27/94

page 13 of 14

~~Proposed Hotel List for CIJE~~

CITY/ FEDERATION

FEDERATION RECOMMENDATION

Ann Arbor, MI 48108
2939 Birch Hollow
313-677-0100

Hampton Inn, Board Walk
925 Victors Way
313-665-5000; 800-426-7866
\$57

Atlanta, GA 30309
1753 Peachtree Rd.NE
404-873-1661

Wyndham-Midtown
10th & Peachtree Rd., 30309
404-873-4800
\$75-\$90

Wyndam Gardens-Buckhead
3340 Peachtree Rd., 30326
404-231-1234
\$99

Baltimore, MD 21201
101 W. Mt. Royal Ave.
410-727-4828

Doubletree Inn at the Colonnade
4 W. University Pkwy, 21218
410-235-5400; 800-528-0444
\$92

Days Inn Inner Harbor
100 Hopkins Place
Baltimore, MD 21202
\$79 (suggested by BTI)

Boston, MA 02111
One Lincoln Plaza
617-457-8500

Omni Parker House
60 School St.
617-227-8600; 800-843-6664
\$145-185 (Ask for lowest available
rate. They run specials as low as \$99)

Charles Hotel
1 Bennett St., Cambridge
617-864-1200; 800-882-1818
\$209

Chicago, IL 60606
1 S. Franklin St
312-346-6700

Hyatt Regency-Chicago
151 E. Wacker Dr., 60601
(Corp. rate avail.thru CAK)
\$70-100

Cleveland, OH
1750 Euclid Ave.
216-566-9200

Sheraton City Centre
777 St. Clair
216-771-7600
\$44

Hartford, CT 06117
333 Bloomfield Ave
203-232-4483

West Hartford Manor
900 Farmington Ave
203-236-3221
\$69

Milwaukee, WI 53202
1360 N., Prospect Ave
414-271-8338

Park East
916 State Street, 53202
414-276-8800; 800-328-7275
\$72

New York, NY 10022
130 East 59th St.
212-980-1000

Roger Smith Winthrop Hotel
501 Lexington Ave., at 47th, 10017
212-755-1400; 800-445-0277
\$145 (includes breakfast)

Seattle, WA 98121
2031 Third Ave.
206-443-5400

Mayflower Park Hotel
405 Olive Way, 98101
206-523-8700; 800-426-5100
\$95

AUTHORIZED LODGING ACCOMMODATIONS

The following accommodations are authorized for ~~Premier~~⁹ use and may be booked either directly with the facility or through ~~our~~^{the} travel agent.

CHAINS



Admiral Benbow Inns	McIntosh Inns
Allstar Inns	Microtel
American Budget Inns	Motel 6
Arburgate Inns	Red Roof Inns
Best Inns	Red Carpet Inn
Budgetel	Regal Inns
Cricket Inn	Road Star
Cross Country Inns	Scottish Inns
Dillon Inns	Shilo Inns
Drury Inn	Sleep Inns
Econolodge	Super 8
Exel Inns	Susse Chalet
Fairfield Inn	Thrifty Inn
Heartland Inns	Traveler's Inn
Journey's End	Travelodge
Knights Inn	Vagabond Inns
L&K Motels	Wilson World
Master Hosts Inn	

FOR INSERTION IN: CIJE OPERATIONS MANUAL

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
TRAVELING IN U.S. AND CANADAno. 2.1
effective 10/27/94
supersedes 5/26/93
page 1 of 12I. OBJECTIVE

Managing our activities in an efficient and economical manner, without "frills," is a basic principle. All travelers are asked to be cost-conscious in their travel planning and to ensure that lodging, meal expense, car rental agencies, and airline carriers meet our standards. Our objective is to keep travel expenses cost effective, as well as to be practical and logical. Please know that all CIJE travelers will use this single set of standards and policies.

II. AUTHORIZED TRAVEL AGENT

The designated authorized travel resource should be used for travel and ticketing.

III. EXPENSE REIMBURSEMENTA. Reimbursement of Expenses

The CIJE reimburses travelers for legitimate travel expenses incurred on authorized trips. In most cases, expenses are paid by the person incurring them, and then reimbursed when the Travel Expense Statement (MAF 02) is approved by your designated approver.

B. Travel Expense Statement

1. Travel Expense Statements must be completed in ink (see Exhibits A). Receipts for expenditures should be attached to the back of the Travel Expense Statement.
2. Travel Expense Statements should be submitted for approval on a weekly or no later than monthly basis, depending on your travel schedule.
3. Fill travel reports out completely. Expense reports cannot be reimbursed when incomplete.
4. Unauthorized expenses will be deducted automatically. Both the traveler and approver will be notified of the amount and reason for the deduction.

C. Travel Expense Reimbursement Standards

Periodically, we review the travel expense reimbursement standards to ensure that they are reasonable. In this review process, data on travel costs is gathered from government and private sources. This data is used to update the travel standards.

D. Temporary Travel Advances

1. Temporary travel advances are available to those who travel only occasionally, and are limited to the estimated cost of the trip.

2. Temporary travel advances may also be obtained when airline rules require that tickets must be purchased 21 days or more prior to the date of travel.
3. When submitting a Travel Expense Statement in which a temporary advance was used, complete and process the form in the normal manner. Deduct the travel advance from the amount due you.
4. Temporary travel advances may be obtained through your supervisor on request.

E. Promotional Rebates, Coupons and Frequent Flyer Awards

Occasionally, organizations will offer promotional coupons, free trips, rebates, etc. which can be applied against the cost of future airline flights, stays at hotels or motels, car rentals, restaurants, etc. Since the CIJE pays for travel expenses resulting from authorized trips, such benefits are the property of the CIJE and should be processed as follows.

1. When a cash rebate is received, the amount of the rebate should be noted on the itemized invoice and used to reduce the cost of the service. The amount shown on the Travel Expense Statement will then reflect the net cost, after the rebate.
2. Any rewards realized from frequent flyer programs are for the benefit of the CIJE, and are to be used for CIJE trips. This is true for any coupons or other rebates.

IV. AIR TRAVEL

- A. All air travel will be on commercial lines. Use of private aircraft or charter airlines is not permitted. Least Cost Routing should always be used.
- B. The back-to-back ticketing technique should be used to obtain discounted air fares when a traveler knows in advance that there is a need to repeat a trip between cities. Back-to-back ticketing is defined as the purchase of two tickets covering travel to the same city on two different occasions. All back-to-back tickets will be billed directly to the CIJE by our travel agent. Therefore, no reimbursement for these airline tickets is expected. See Exhibit A, No. 5 for reporting such expenditures.
- C. Charges for excess baggage are not reimbursable unless the excess baggage is extra equipment required for a specific assignment.
- D. Travel To and From the Airport

Travelers are expected to utilize the most logical, and practical, least-cost method of travel to and from the airport.

V. GROUND TRANSPORTATION

A. Travel by Private Car

1. When it is appropriate to use your personal car for CIJE business, a mileage/kilometer allowance (see authorized rates on Exhibit B) is authorized to cover all expenses except for:
 - a. Toll charges - reimbursed at actual cost.
 - b. Parking - reimbursed at actual cost. At airports, charges are not to exceed the maximum long-term daily rate at the airport.

B. Receipts

1. A receipt for paid ground transportation (bus, courtesy van, taxi, etc.) is required when the expenditure for any one occurrence exceeds \$10.00.
2. A receipt for parking charges and toll charges over \$4.00 is also required.
3. As a general rule, obtain receipts wherever practical to do so.

VI. CAR RENTAL

A. Reservations

All rental car reservations must be made through our authorized travel agent. Generally, a compact car will be rented.

B. Insurance

When renting a vehicle, you should always take the collision protection charge and other forms of insurance coverage. You should not waive any coverage.

C. Gasoline

Gasoline purchases for a rental car are to be added to the vehicle cost and entered as a single total recorded in the "Car Rental Expense" block. Travelers are asked to fill up rental cars when returning them, to avoid incurring the excessive gasoline charge made by rental companies.

VII. HOTEL ACCOMMODATIONS

- A. All travel reservations for accommodations should be made as per the instructions given you. (To be developed)

- B. Single minimum rate rooms will generally be used.
- C. Charges are to be paid by you upon checking out. They should not be billed to the CIJE.
- D. Note: We do not provide reimbursement for any "guaranteed reservations" that were not cancelled due to your error.
- E. Laundry and valet expenses are reimbursable if you are away from home on CIJE business at least six consecutive days.

VIII. MEALS

- A. The actual amount spent on meals is reimbursable up to the maximum limits listed in Exhibit B. Tipping is not separately reimbursable as it is covered in the meal allowance.
- B. Please note that there are three levels of meal expenses. We expect you to follow the standard level when you can. We have published two additional levels, and ask you to use your judgment as to which level to follow. As a guide, we would expect the following.
 - 1. Use the standard level, as a general rule.
 - 2. When you are unable to conveniently take your meals in "reasonable" restaurants, you may use Level 2.
 - 3. In certain large cities, for example, New York or Los Angeles, you may find it necessary to use Level 3.
- C. Meal costs must be itemized daily on your Travel Expense Statement. All personal meals and all outside guest meals require a receipt. Tips to a maximum of 15% should be added to the receipt when they are not included.
- D. Reimbursement for meals is only authorized when you are away from home overnight or in the following instances:
 - 1. BREAKFAST - When required to eat away from home due to CIJE business (i.e., meetings, training sessions, etc.)
 - 2. LUNCH - When you are working more than 30 miles/48 kilometers from your base office. NOTE: If you work out of your home, that is your "base office."
 - 3. DINNER - When you must work past 7:00 p.m. away from your home, or when performance of job duties, due to travel, prevents you from being home by 7:00 p.m. In both instances, a meal expense must be actually incurred.

- E. Meals held as a "convenience" with other CIJE personnel in your home city are not reimbursable.
- F. The consumption of alcohol creates a potential hazard to the health and safety of all. Accordingly, alcoholic beverages are not appropriate and are not reimbursable.
- G. If, in line with CIJE business, you dine with another CIJE employee or consultant, each should pay for his or her own meal except when entertaining guests (See Section IX).

IX. ENTERTAINING GUESTS

If, in line with CIJE business, you have a meal with other non-CIJE personnel, it may be appropriate on occasion for you to pay for the whole check.

- A. As a general guideline, the price of such meals should follow our normal meal allowances. However, this may not be practical in all situations or locations. In such instances, good judgment should be exercised, and explained on your expense report.
Note: The total cost of your meal plus your guest(s) should be entered in the "entertainment and other non-travel expenses" category on the Travel Expense Statement.
- B. Complete the "entertainment and other non-travel expenses" category on the back side of the Travel Expense Statement and include the following:
 - 1. Date of expenditure
 - 2. Name of establishment
 - 3. Business purpose
 - 4. Name, title and organization of all attendees (including CIJE employees).
 - 5. Amount
- C. Attach a receipt showing the amount and the name of the establishment.

X. TELEPHONE COMMUNICATIONS

- A. Telephone charges should be itemized on your Travel Expense Statement by identifying the person or organization called.
- B. Direct dialing should be used to take advantage of the lower rate offered. An operator assisted call increases the cost of a phone call and should be avoided.

XI. NON-REIMBURSABLE ITEMS

The following expenses are not approved unless specifically authorized in advance, and individuals incurring them will do so at their own expense:

- A. Office equipment or tools.
- B. Any cost associated with cellular telephones, including equipment acquisition, installation, maintenance, usage and service fees.
- C. Excess baggage charges, unless the excess baggage is equipment required for a specific assignment.
- D. Mileage/kilometer charges on personal car for personal travel.
- E. "Guaranteed" reservations that are not used and were not cancelled due to your error.
- F. Tipping for meals, as this is included in the meal allowance. #



STANDARD INSTRUCTIONS FOR COMPLETING EXPENSE STATEMENT (See Exhibit A)

Note: Travel expense Statements must be completed in ink.

1. Entity/Project for CIJE related activities should always say "CIJE."
2. "Period Ending" should be completed with the concluding date of expenses covered in this statement.
3. Enter the address where the check should be mailed.
4. Specifically state the purpose for your travel. For example: "To meet w/consultants in N.Y., on (Date)." or, "To attend conference in Toronto, on (Date)."
5. Enter the amount of airline tickets obtained or provided to you by the CIJE on a prepaid basis. Attach the "original passenger receipt" copy(s) and the travel itinerary provided by our authorized travel agent to the back of the statement.
6. Note: All unused airline tickets should be attached to the front of the statement. This includes CIJE prepaid tickets as well as non-refundable tickets that were charged to the traveler.
7. Date of travel.
8. City traveled from.
9. City traveled to.
10. Amount of airline tickets which you used. Attach the passenger receipt copy(s) and the travel itinerary provided by our authorized travel agent to the back of the statement. In lieu of the original passenger coupon, attaching a clear photocopy (when possible) of the ticket with a note explaining the circumstances will be acceptable in the following situations.
 - a. When the original passenger coupon must be surrendered to the travel agent or airline to obtain credit for a ticket which was only partially used.
 - b. When "back-to-back" tickets have been obtained to qualify for discounted airline fares. In this case, the second copy of each of the two tickets will not be used until the second trip is taken. This requires that the "passenger receipt" of each ticket may not be torn out until all segments of each ticket have been used.

11. Total amount of personal auto expense incurred for each day as detailed on the reverse side of the statement.
12. In the event it is necessary to rent a car for CIJE business purposes, a compact car will be rented through the authorized travel agent and the amount of the rental plus fuel purchased entered here. The car rental agreement, gasoline receipt(s) and the travel itinerary, provided by our authorized travel agent must be attached to the back of the statement. See Section VI for detailed guidelines on car rental.
13. Amount of local transportation as detailed on the reverse side.
14. Motel and hotel charges are to be paid for by you upon checking out. See Section VII for detailed guidelines on accommodations.
15. Meals
 - a. Current meal standards are listed on Exhibit B.
 - b. See Section VIII of this policy for detailed guidelines on reimbursement of meal expenses.
16. Costs incurred for business related postage.
17. Telephone
 - a. Telephone charges should be entered here and detailed on the reverse side.
 - b. If no receipt is available, the calls should be listed on the reverse side of the Travel Expense Statement in the space provided as shown in Exhibit A, No. 17.

If a receipt is available, indicate the name of the person and city called next to each charge on the receipt.
 - c. Include original copy of any charge card billing with the name of the person called next to each charge.
18. Amount of all other reimbursable expenses should be entered here and detailed on the reverse side. Note: Entertainment expense should be detailed as indicated on Exhibit A.
19. Daily total of reimbursable expenses.
20. Deduct the amount of travel advances you received, if applicable, and determine the amount due to or from the CIJE.
 - a. If you spent more than the advance, deduct the amount of the travel advance from the total expenses and show the balance to be reimbursed.

FOR INSERTION IN: CIJE OPERATIONS MANUAL

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
TRAVELING IN U.S. AND CANADA

no. 2.1
effective 10/27/94
supersedes 5/26/93
page 9 of 12

- b. If the travel advance exceeds the expenses incurred, please submit your check with your Travel Expense Statement to repay the advance.
21. Submitter must sign here. Submit to designated approver who will approve and submit directly for reimbursement. No expense statement will be processed if the submitter's signature is missing.
22. Detail expenses incurred for the use of your personal car.

NOTE: Beginning and ending daily mileage/kilometer readings must be entered on the reverse side of the Travel Expense Statement in the space provided. Always record your car's total beginning and ending mileage, for example, beginning 26,152 - ending 26,247.

23. Original receipts should be attached to your Travel Expense Statement. Photo copies are not acceptable.



SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
 TRAVELING IN U.S. AND CANADA

Exhibit A

MANDEL ASSOCIATED FOUNDATIONS
TRAVEL EXPENSE STATEMENT

ENTITY/PROJECT C I J E ① PERIOD ENDING ② 9/15/94

NAME (PRINT) Albert Adams ADDRESS 123 Broadway ③ CITY Anytown STATE AZ ZIP 87654

P O MON
 U F TUE
 R WED Meet with consultants in NY on 9/1-9/2/94
 P T THUR Attend conference in Toronto 9/9-9/10/94
 O R FRI
 S I SAT. and/or SUN
 E P

 NON-REIMBURSABLE AIR TRAVEL CHARGED TO MAF
 (ATTACH RECEIPTS) (SEE NOTES 1 & 2)

⑤ \$ 697 BTB-Trip 1

DATE	7/	9/1	9/2	9/9	9/10			
FROM	⑧	Anytown	NY	Anytown	Toronto			
TO	⑨	NY	Anytown	Toronto	Anytown			
								TOTALS
AIR TRAVEL (SEE NOTE NO. 2)	⑩			525.00				525.00
ALTO. EXP. OWN CAR (DETAIL ON REVERSE SIDE)	⑪		14.46		15.46			29.92
CAR RENTAL EXPENSE (INCLUDE PURCHASED GAS)	⑫							
OTHER TRANS. (DETAIL ON REVERSE SIDE)	⑬	20.00	18.50	2.50	2.50			43.50
LODGING	⑭		135.00		112.00			247.00
BREAKFAST	⑮				6.00			6.00
LUNCH			7.50	6.75	8.00			22.25
DINNER		22.75		17.50				40.25
POSTAGE	⑯							
COMMUNICATIONS (DETAIL ON REVERSE SIDE)	⑰	2.25	.50					2.75
ENTERTAINMENT AND OTHER NON-TRAVEL EXPENSES (DETAIL ON REVERSE SIDE)	⑱		48.50					48.50
TOTAL - (EXCLUDE NON-REIMBURSABLE ITEMS)	⑲	45.00	224.46	551.75	143.96			965.17

NOTES:

1. Attach unused, company-paid tickets to the front of this report.
2. If this flight was not the least expensive, please explain why.

3. Attach receipts for Air Travel, Lodging, and all other appropriate receipts.
 Failure will delay reimbursement per Travel Policy.

4. Fill out this report completely. Expenses will not be reimbursed when a report is incomplete.

LESS ADVANCE (if applicable)

AMT. DUE MAF (attach check)

AMT. DUE FROM MAF

⑳ 965.17

 I hereby certify that all of the above listed expenses were authorized
 amounts incurred in connection with my official MAF duties.

②① (SIGN) Albert Adams 9/20/94

Date

MAF 02 (4/94)

Approved By (Print)

Virgil Vogel

(SIGN)

Virgil Vogel 9/22/94

Supervisor

Date

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
TRAVELING IN U.S. AND CANADA

no. 2.1
effective 10/27/94
supersedes 5/26/93
page 11 of 12

AUTO EXPENSE - OWN CAR

1. DATE	9/1	9/2	9/9	9/10				TOTALS
2. TRAVEL FROM:	Home	Airport	Home	Airport				
3. TO:	Airport	Home	Airport	Home				
4. TO:								
5. ODOMETER START	26174		27174					
6. ODOMETER FINISH		26203		27203				
7. MILES DRIVE:		29		29				58
8. MILEAGE RATE		.24		.24				.24
9. MILEAGE EXPENSE		6.96		6.96				13.92
10. PARKING		7.50		8.50				16.00
11. TOLLS		—						
12. TOTAL AUTO EXP. (10+11+12)		14.46		15.46				29.92

ATTACH ALL RECEIPTS, OTHER THAN UNUSED AIRLINE TICKETS. ATTACH UNUSED AIRLINE TICKETS TO THE FRONT.

OTHER TRANSPORTATION - TAXI, LIMO, BUS, OTHER (ATTACH RECEIPTS)

DATE	SPECIFY TYPE	FROM	TO	AMOUNT
9/1	Taxi	La Guardia	Roger Smith Hotel	20.00
9/2	Taxi	Roger Smith Hotel	La Guardia	18.50
9/9	Subway	Airport	Downtown Toronto	2.50
9/10	Subway	Downtown Toronto	Airport	2.50

COMMUNICATIONS (ATTACH RECEIPTS)

FROM	TO	PERSON CALLED	REASON	AMOUNT
Airport	Office	A. Smith	Check for messages	2.25
Hotel	JCCA	B. Jones	Confirm meeting	.50

ENTERTAINMENT AND OTHER NON-TRAVEL EXPENSES (ATTACH RECEIPTS)

[illegible]

FOR INSERTION IN: CIJE OPERATIONS MANUAL

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
TRAVELING IN U.S. AND CANADA

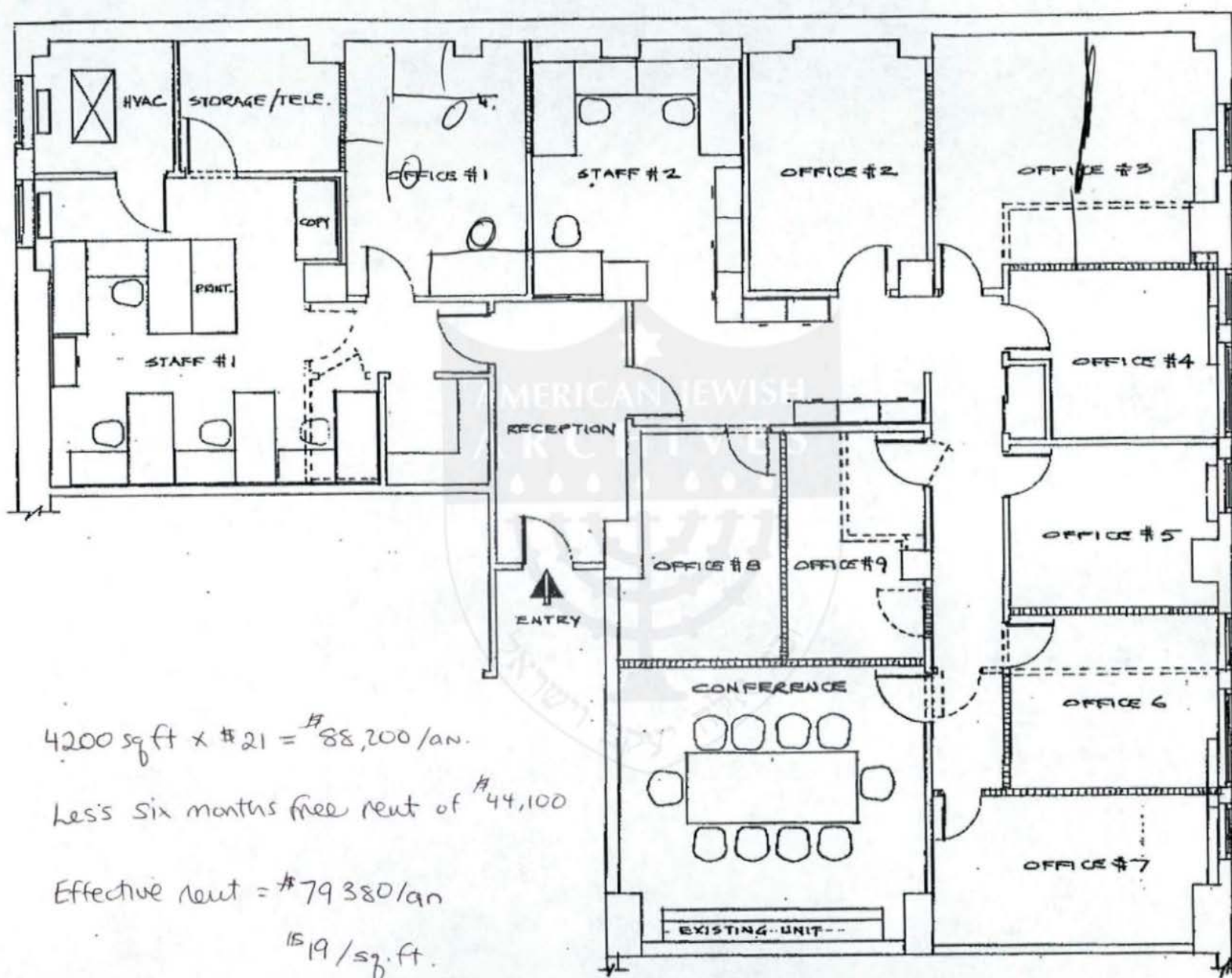
EXHIBIT B

no. 2.1
effective 7/01/96
supersedes 10/27/94
page 12 of 14

Exhibit B

TRAVEL ALLOWANCES
UNITED STATES

	<u>STANDARD LEVEL</u>	<u>LEVEL 2</u>	<u>LEVEL 3</u>
Breakfast	\$ 6.10	\$ 6.35	\$ 7.95
Lunch	\$ 6.10	\$ 8.50	\$10.60 +
Dinner	\$14.80	\$18.55	26.50
Mileage	26 cents/mile	26 cents/mile	26 cents/mile
Location	Columbus Milwaukee Nashville	Atlanta Baltimore Cleveland Denver Hartford	Chicago Boston Los Angeles New York Washington DC



$4200 \text{ sq ft} \times \$21 = \$88,200/\text{an.}$
Less six months free rent of \$44,100
Effective rent = \$79,380/an
\$19/sq.ft.

interoffice

MEMORANDUM

to: Mort Mandel, Alan Hoffmann
from: Karen Barth
subject: Board Structure
date: November 12, 1996

It has been clear for some time that our governance structure needs rethinking. Our Steering Committee is functioning well and is a real asset to the organization, but the Board is not supporting the work of CIJE in any meaningful way and is not as effective as it could be in getting important leaders in the Jewish community excited about our work.

We face an important decision. An effective Board structure is critically important to our ongoing success and especially to our mission of community mobilization. Though it will be difficult to make a change in Board structure at this point, it is certainly doable. However, if we make a mistake at this juncture, it would be difficult to change again.

There are four basic options that we have discussed. None of these are mutually exclusive. In fact, we could decide we need all of them.

- 1) A modest size Steering Committee or Board of CIJE that is responsible for setting direction and making major decisions
- 2) A small Executive Committee that makes interim decisions between Steering Committee or Board meetings
- 3) A large Board or Advisory Board that meets infrequently to hear about the work of CIJE and to provide very general advice on "big picture" issues
- 4) A very large group of interested senior leaders who would meet every two years to discuss issues in changing Jewish education

Within each of these options there are questions as to the specific objectives and role of each body (fundraising, governance, advice) and on the type of members who should be invited to join (e.g. lay or professional, large donors or not). CIJE has been struggling with these options for some time. In order to decide between them, we need to answer some fundamental questions about our objectives for the governance structure: What is our long term fundraising strategy and how do we want our Board/Governance structure to support it? What is our long term operational strategy and how do we want our Board/Governance structure to support it? What is

Mort Mandel, Alan Hoffmann

Page 2

November 15, 1996

our long term plan for spinning off institutions (e.g. TEI) and what kind of support will we need for this? How much staff time do we want to devote to the development and maintenance of Board relationships?

I see no way to reach a good decision about our Board structure without working through the above issues. I'd like to propose the following process to be linked in with our strategic planning process;

- 1) Solicit the opinion of some of our important and more active current Board members (e.g. Bronfman, Hirschhorn) as well as some we have failed to engage (e.g. Arnow). Try to understand what they have liked and disliked in their relationship with CIJE to-date and how they would like to be involved in the future.
- 2) As the fifth phase of our strategic planning process explicitly addresses the issues raised above, lay out the pros and cons on each of the four options above in relation to our strategic plan developed in the first four phases.
- 3) Cancel our April Board meeting but hold Board seminar on Steering Committee evening.

I think with this methodical approach we can not only arrive at an answer that will be right for CIJE but with a clearly articulated set of objectives it will be easier to implement the change effectively.

I look forward to discussing this with you when we meet on November 19th.

~~DRAFT~~

To: Mort, Alan

From: Karen

Subject: Board Structure

Date: November 12, 1996

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OFFIT BANK

The Investment Management Bank

Morris W. Offit, CFA
Chief Executive Officer

To Alan Hoffmann
At. Weston Hotel
206/728-2259

November 13, 1996

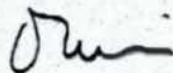
Mr. Alan Hoffman
Executive Director
The Council for Initiatives in Jewish Education
15 East 26 Street
New York, NY 10010-1579

Dear Alan:

Please know how much I enjoyed meeting Karen and you. I look forward to being with you on December 5. In the meantime, I have enclosed for your interest some material on our Non-Profit Forum. Subject to your approval, I will add your name to our invitation list.

All best wishes.

Sincerely,



/jb

Enclosure

VIA MESSENGER

520 Madison Avenue New York NY 10022-4213 212 350 3800 Fax 212 593 4711

5:30
Alan - This arrived late
Today - Will hold for
you unless you tell
us otherwise. (mail
will be in slot behind
my desk if you're
here in office over
weekend.)
Holly



Brandeis University

Joe Reimer file

Philip W. Lown
School of
Near Eastern and
Judaic Studies

Benjamin S. Hornstein
Program in Jewish
Communal Service
Waltham, Massachusetts
02254-9110

617-736-2990
FAX: 617-736-2070

October 28, 1996

Alan Hoffmann
CIJE
15 East 26th Street
New York, NY 10010

Dear Alan,


Please find enclosed the notes Susanne took on the consultation with lay leaders on October 18. We hope you find them clear and accurate to your memory.

This is a good occasion to thank you for all the help and advice that you have provided along the way. Clearly we would never have gotten to this point without your constant concern and consultation. As was said at the meeting, it has been a real partnership. We value that highly.

There is still a long way to go. But we felt the meeting on the 18th was a positive signpost along the way. Many thanks.

Sincerely,


Joseph Reimer


Susan Shevitz

enc.

ng

TASK FORCE ON JEWISH EDUCATION AT BRANDEIS

REPORT ON OCTOBER 18 CONSULTATION WITH LAY ADVISORS

Prepared by Susanne A. Shavelson

Meeting Participants:

- Lay Advisors and Consultants — Moses Deitcher, Phyllis Deitcher, Alan Hoffmann, Barry Holtz, Mort Mandel, Chuck Ratner, Esther Leah Ritz
- Brandeis Faculty — Marc Brettler, Josh Elkin, Edward Kaplan, Joseph Reimer, Jehuda Reinharz, Shulamit Reinharz, Jonathan Sarna, Len Saxe, Susanne Shavelson, Susan Shevitz, Dan Terris

Brandeis president and planning process chair Jehuda Reinharz began the meeting by welcoming all present. Participants then introduced themselves, describing briefly their backgrounds and their interest in Jewish education at Brandeis. Concerns raised included Jewish identity, particularly among youth; the need for development of professional and lay leadership; building the profession of Jewish education; and involving the non-religious Jew. Mort Mandel said that he has become increasingly convinced of the importance of education in the Jewish community's future. Jehuda Reinharz commented on his own long-term commitment to Jewish education, noting that this task force is the only one at Brandeis in which he is directly involved. Having deliberated for a year, he observed, the task force needs now to test its ideas with leaders of the North American Jewish community.

Needs of the Field

Joseph Reimer provided an overview of how the needs of the field of Jewish education have changed since the publication of *A Time to Act* in 1990 (see attachment, "Needs of the Field: Assessing Jewish Education in the 1990s"). Under the categories of participation, communal support, professionalization and research, he reviewed developments since 1990 that represent positive change, and challenges that continue to the present.

In Alan Hoffmann's view, the rise in the Jewish community's consciousness about Jewish education has been an important development, yet existing energy has not been efficiently focused and mobilized. Lay leadership, in particular, is an important issue — the community is a long way from having the critical mass needed to advocate for Jewish education. Chuck Ratner seconded Alan's observation about the rise in consciousness with a story from his experience in Cleveland, where lay audiences have been far more receptive to substantive Jewish content at meetings than they would have been even 10 years ago.

Esther Leah Ritz felt that the most successful initiatives have had the least involvement from denominational interests. She was skeptical of synagogues' fitness to carry the responsibility for "outreach" on their own, and felt that the participation of Jewish Community Centers, Hillels, and other nondenominational entities is crucial. She also asked a question that will be useful for the Brandeis task force to consider: how should evaluation research, which has long been part

of Brandeis's plans, be used? Moses Deitcher suggested that Brandeis could be an appropriate convener not just for Jewish educators and organizations, but also for academics involved in Jewish studies. This suggested another research question to Barry Holtz, namely, what has been the impact on university students of the boom in academic Jewish studies over the last 25 years?

Shulamit Reinharz noted another major change that has occurred (beginning before 1990) — the great growth in participation by women in both religious and communal life. She also observed that the needs enumerated leave aside the question of content. How, she asked, do we know when a person is Jewishly educated? Mort Mandel announced a new collection of essays on "What is an educated Jew?" that will help to answer this.

Brandeis Resources

Jehuda Reinharz turned the discussion to the university's resources in Jewish education. Brandeis has a large and diverse population of Jewish students from across the spectrum of Jewish life and religious identification. It is a major training ground for the future professional and lay leadership of the Jewish community. The university's current and potential resources for addressing needs in Jewish education are considerable. Faculty members offered some highlights of existing programs, including:

- The department of Near Eastern and Judaic Studies, the oldest, largest and most diverse in the country. It has trained many of the leading Judaic scholars now active and enrolls large numbers of students in courses each semester, including over 300 in Hebrew alone.
- The Hornstein Program in Jewish Communal Service, which has alumni in leadership positions around the world. Among the program's particular strengths are a combination of stability and dynamism, which allows it to change while retaining its core mission; training which offers a paradigm of community engagement and diversity; and its history as the first Jewish communal service program in the country which integrated Judaica, professional practice, and social science in its training.
- Social science research being carried out by Len Saxe at the Heller School for Social Welfare on drug use has yielded valuable data about identity formation that will be instructive for work on Jewish youth and adolescence.
- Brandeis's Jewish atmosphere: Edward Kaplan told of his own Jewish intellectual development, describing how the Brandeis environment provides opportunities for faculty from all disciplines and departments to increase their Jewish commitments, integrate Jewish studies with their other passions, and participate more in Jewish life on campus.

Chuck Ratner urged Brandeis to help communities understand how to use the scholarly expertise that exists at Brandeis and elsewhere to address communal problems: "We need the big ideas and the models."

The discussion turned to a consideration of Jewish identity and diversity, at Brandeis and in the general community. At Brandeis, 400 students gather each Friday night for Shabbat dinner. The event is non-denominational, highly diverse and very successful, but as Jehuda Reinharz pointed out, it happens this way because the university would not permit separate denominational gatherings.

Brandeis Activities

Susan Shevitz presented some of the task force's ideas, developed over the last year of planning, for matching the university's abilities with selected needs in the field of Jewish education. She asked the lay advisors present to consider whether these program directions represent "what a university can best do." Given that not everything can be done at once, she continued, "what's the best place to start?" Susan described three proposed action-oriented initiatives: pre-service training for Brandeis students, program development and research in youth and adolescence, and school leadership development. The fourth initiative proposed, the Colloquium on Education and the Jewish Future, would be a deliberative function intended to consider the major issues in Jewish education and the Jewish future from a variety of academic and practical perspectives (see attachment, "Proposed Activities").

The action-oriented initiatives have in common: 1) multidisciplinary approaches that foster collaboration between the academy and the field; 2) a recognition of the importance of research and evaluation; 3) a commitment to developing and working with a cadre of knowledgeable, capable lay leaders; and 4) components for the development and testing of ideas. The deliberative component, the Colloquium on Education and the Jewish Future, would bring together people who would not ordinarily have the opportunity to learn from one another. Leading Judaic scholars, other academics with an interest in Jewish education, communal leaders and educational leaders will meet to advance new ideas about the role of education in Jewish life, the future of the Jewish community, and other large, long-term questions.

Mort Mandel felt that the two questions — about the university's abilities and about priorities — were the same. The priorities would sort themselves out according to interest and competence. The pertinent question to consider was, what can Brandeis do better than anyone else — what at Brandeis singularly or specially equips it to undertake a given project? For general planning principles, he suggested thinking big but starting small, with impact in mind from the beginning to be able to measure progress. The process of planning, however, should be a journey, with opportunities built in for development, consultation and change, yet always moving toward a specific goal.

Of the four action areas proposed, Mort was most interested in the deliberative component and the youth and adolescence initiative. It will be necessary to have ideas and rich content, he advised, to attract the best minds to work on a problem. Brandeis should focus its efforts on initiatives that have the most potential for causing broad change in the community in the long term.

Esther Leah Ritz thought that a short-term, intensive on-site training program, with supervised long-distance learning from their communities, could have a significant effect on the practice of principals. If four or five principals in a given community undergo such training, it could have a significant impact. Chuck Ratner agreed that there is a real crisis for principals, and thought Brandeis could be a place where that was addressed. Susan Shevitz noted that the Heller School is one of several Brandeis resources with existing capabilities for developing programs in this area. Chuck also saw a possible role for Brandeis in training teachers of Hebrew. Mort Mandel agreed with this, because it plays to a specific Brandeis strength.

Alan Hoffmann suggested some ways of synthesizing the components, such as including school leadership programming within the youth and adolescence initiative. He discussed the

idea of the colloquium, which has been a powerful one since the beginning of the task force's deliberations. The task force itself, in fact, has been a model for the development of ideas and long-range plans. He also thought that pre-service training had major potential for encouraging the possibility of careers in Jewish education among Brandeis students. At the same time, however, the building of a BA program in Jewish education should probably be of a lower priority than other plans.

Josh Elkin saw a progression from one proposed action area to another: programming for youth and adolescence, to training for college students, to leadership development among educational professionals. These concentrate on the typical 10-year hiatus in Jewish involvement from the mid-teens to the mid-20s. He saw great possibilities for retaining youth and working with college students as potential professionals. Work in this area could help answer the question "What are the critical ingredients to move from age 13 to adult life?"

In Marc Brettler's view, any training programs Brandeis develops will serve as models for other communities. The impact will go far beyond the actual numbers trained at Brandeis. Mort Mandel agreed that it was worthwhile to demonstrate models for others to adopt and carry out, but felt that Brandeis should concentrate most of its efforts on what it is uniquely suited for. He liked the image of a progression through a portion of the life cycle, as it goes beyond a single, isolated experience.

Len Saxe spoke in support of long-range planning and idea development. Brandeis's strengths include academic excellence and an unusually productive faculty, and it will be important to provide them with space for their ideas to evolve and for their scholarship to be carried out.

Conclusion

Mort Mandel stated that now is the time to build the first room of the "house" for Jewish education that Brandeis has in mind. The university is in a position to provide leadership and conceptualization for the entire field. Even if youth and adolescence isn't the best choice as a starting point, it's certainly not a bad choice. Chuck Ratner noted that profession-building is present throughout the task force's proposed plans, and reminded the group of the importance of building lay leadership in every area. Alan Hoffmann suggested that as Brandeis is becoming a national address for Jewish educational issues, it can also become a convener for the lay leaders of institutions relevant to each area of concern. For example, youth and adolescence initiatives can provide opportunities for involving the lay leadership of JCCs, schools and camps. Barry Holtz thought that seminars with Brandeis faculty would be tremendously appealing to lay leaders, involving a variety of approaches to learning about relevant topics.

The meeting concluded with a discussion of next steps. The steering committee will now proceed with the development of a draft proposal and budget, to be reviewed with the task force in early December. When the specific design has progressed further, another lay advisors' meeting can be planned.

TASK FORCE ON JEWISH EDUCATION AT BRANDEIS

REPORT ON SEPTEMBER 19 TASK FORCE MEETING

Present: Joyce Antler, Marc Brettler, Joshua Elkin, Arthur Green, Irving Epstein, Barry Holtz, Edward Kaplan, Daniel Margolis, Alan Mintz, Joseph Reimer, Jehuda Reinharz (Chair), Shulamit Reinharz, Bernard Reisman, Myron Rosenblum, Jonathan Sarna, Leonard Saxe, Susanne Shavelson, Susan Shevitz, Larry Sternberg, Daniel Terris, Peter Witt.

Not present: Sylvia Barack Fishman, Robert Szulkin.

The purpose of this meeting was for the task force to be brought up to date on the steering committee's work since last spring, and for the task force to review the elements proposed for the center for Jewish education. Jehuda Reinharz opened the meeting by offering his own perspective on the planning process thus far. His involvement has been primarily with people outside the university, whose support will be important in the development and execution of Brandeis's plans. He has been in close touch with Mort Mandel, who is interested and excited about the task force's progress. In Cleveland Jehuda met another possible donor, Charles Ratner. He will choose from among several proposals related to Jewish education, but whichever initiative he decides to support, it will fit into the task force's plans. Other related developments include a three year \$750,000 grant from the CRB Foundation to train youth professionals to recruit teens for Israel trips, interest from the Meyerhoff family in developing a community project in Baltimore, and the new Jewish high school adjacent to campus.

Jehuda announced to the task force that there will be a meeting at Brandeis on October 18 with Mort Mandel and other high-level lay leaders to review the planning process. The purpose of this meeting will be to solicit their input and gain their support. He reminded the task force that this is the only such initiative at Brandeis in which he is directly involved, because he feels that it has the greatest potential for impact at Brandeis and on the American Jewish community.

Dan Terris began the review of proposed center elements with the *Colloquium on the Jewish Future*. He referred to the July 2 task force meeting on interdisciplinary seminars as a major influence on the steering committee's plans. The new name (from "Core Seminar") is meant to reflect the intention to convene an ongoing conversation about large issues concerning the present and future of the Jewish community and the role of Jewish education in it. The colloquium would give scholars and practitioners time and space to engage in dialogue about major issues that concern the entire community.

Art Green expressed the concern that each topic receive enough time for in-depth exploration and stressed the need for follow-up and continuity, perhaps with on-going working groups. Dan responded that each topic would most likely run for at least a year at a time. Joyce Antler pointed out the need to differentiate between two possible goals: the creation of dialogue between scholars and practitioners, or scholarly debate. Each would imply a different structure. Len Saxe urged the inclusion of a product planned into the

colloquium from the beginning. This could create dialogue by providing a stimulus to which people could react.

Alan Mintz thought that "on the Jewish future" sounded "grandiose." He thought that the colloquium's name should refer explicitly to Jewish education. Jonathan Sarna suggested "Colloquium on Education and the Jewish Future." He urged the involvement of the entire Brandeis community, including perhaps student-observers. Shulamit Reinharz wondered about the role of practitioners in the colloquium — what would work best for them? For true dialogue to take place, the colloquium would need to facilitate equal interchange and learning between practitioners and academics. Josh Elkin replied that this could be a valuable opportunity for practitioners, who ordinarily have very little time to reflect or engage in this type of dialogue. Jehuda Reinharz's sense was that the idea of the colloquium is strong and the issues for its agenda will emerge out of the center itself.

Larry Sternberg asked about the relationship of the colloquium to the other work of the center. If the colloquium is substantive, it may be desirable to link it and its products more closely to the other functions. Danny Margolis offered two caveats: to be selective when choosing practitioners to participate in the center, and to give practitioners the time and space to feel "removed" from their everyday lives for a period of time to allow for reflection.

Joseph Reimer presented the next center component, the *Major Programs*. These initiatives (formerly known as "Focus Areas") will be the principal outreach arms of the center. The center would start with one major program then add others over time, each of which will represent a strategic cut into the field. Each major program will identify ongoing work in its area of concern, then use university resources to advance that work. Questions remain to be answered: for a given topic, what will the goals, Jewish content, and empirical aspects of the endeavor be? Among the goals could be the raising of policy questions, an appropriate function of a university. Another question concerns dissemination: what kinds of information, in what forms, to what audiences could a major program communicate?

The steering committee envisions at present two initial major programs. The first would focus on youth and adolescence, followed by a major program in school leadership. Joe identified the former as an area of major need due to the growing population in this age group and the poverty of services available to it. Substantial resources, in the form of programs and research capacity, already exist at Brandeis. These could make the university's contribution uniquely helpful to the Jewish community.

Susan Shevitz followed with a description of the second proposed major program, in school leadership. She noted the chronic, long-term shortage of school personnel, including principals. She characterized the field of research into models and types of leadership in Jewish schools as "virgin territory," and also noted the potential for action projects and other opportunities for partnerships with the field. Training goals would include increasing the number of trained leaders (including training Brandeis students) and improving the skills of those already in the field, in the areas of Judaica, education theory, administration and leadership.

Several task force members expressed the desire for a clearer sense of the center's structure and staffing, in order to understand how the major programs will fit into the overall plan. Susan Shevitz responded that these specifics will emerge shortly from research currently being conducted into the structures, governance and collaboration models of existing centers at other universities. The steering committee noted that once the task force has approved a general plan for the center, they will actively engage the field in developing the plan further.

Task force members had other suggestions. Len Saxe was concerned that research and scholarship — the university's greatest strength — were not listed first among the goals of the major projects. Josh Elkin, however, felt that while Brandeis's strengths in scholarship were clear, the task will be to translate these into applications for the field. He also suggested a stronger relationship between the two proposed major projects, because of the critical need for leadership for youth. In addition, he urged attention to the issue of lay leadership. Shulamit Reinharz suggested integrating the colloquia into the major programs, making their focus broader. She also raised the question of how faculty members will deal with their other commitments, if they are going to be expected to participate in the center. In Joyce Antler's view, the university's function of dissemination and partnership is more important than direct intervention. Jonathan Sarna sought a more even balance between scholarship and practice. In his view, Brandeis is best at inquiries such as "The History of Leadership in Jewish Education," and should ensure that such inquiries are fostered.

Irv Epstein raised the issue of resources, commenting that faculty time and physical space will be harder to guarantee than money alone. A solution to the time issue would be to increase the pool of faculty members, but solving the space problem will be far more difficult. He sees a variety of potential benefits to the university from the center's work, including the expansion and improvement of educational programs and increased opportunities for research and other forms of scholarship. Barry Holtz suggested degree programs as an obvious area for university involvement, and which should be considered as part of this initiative. Alan Mintz agreed on the importance of degree programs, suggesting as an example the training of NEJS Ph.D.s for work in Jewish education.

Marc Brettler presented the third component of the center, the *Short-Term Projects*. These projects, several of which would be active at a given time, will signal the breadth of the center's concerns from the beginning. They would involve scholars and practitioners. Involvement with a short-term project could include participation in summer seminars, release time during the school year, or supplemental funding. Short-term projects would be on a smaller scale and of a shorter duration than a major program, centering around a smaller "cut" of the field. Topics would be chosen on the basis of community need and Brandeis faculty interest. Activities could include research projects, pilots (in curriculum, for example), or a seminar. These would be supported through outside funding, and could potentially become major programs over time. Short-term projects would provide an opportunity for coordinating faculty interests with the center by fitting a faculty member's area of interest into an existing structure or by creating a new framework to fit the interest.

Task force members were intrigued by this design, but some felt that it was difficult to react without a clearer conception of the center itself. Larry Sternberg observed that the relationship between the elements was more visible, and that the variety of elements was

exciting. In terms of priority-setting, he suggested starting with smaller initiatives and letting their progress determine directions for growth.

In response to task force members' questions about how the center will actually function, Irv Epstein observed that much will depend on who will be directing the center. A good leader, he felt, can both clarify options and provide leadership. Jehuda Reinharz suggested that some modeling of the center and its elements would be helpful for the next task force meeting.

Susan Shevitz concluded the meeting by presenting the timetable for the remainder of the planning process. Research is being conducted now about the structure and governance of other university-based, interdisciplinary research and policy centers around the country. During the early winter, a draft proposal will be submitted for the task force's evaluation for a multi-year plan to phase in the center. In the spring, the draft of the task force's report will be submitted to the task force for its review, to be followed by revision over the summer. By autumn 1997, the anticipated time of the task force's final meeting, the report and implementation plan should be complete.



Jehuda Reinharz
President

June 17, 1996

Mr. Morton L. Mandel, Chairman
Mandel Associated Foundations
1750 Euclid Avenue
Cleveland, OH 44115

Dear Mort,

It was a pleasure to speak with you the other day about the Task Force for Jewish Education at Brandeis and the progress in planning. On May 31st, I attended the last meeting of the steering committee with Alan Hoffmann and Barry Holtz and was very pleased to see how well this partnership between Brandeis and the CIJE has been evolving.

It was from that meeting that we generated the initial list of names for a lay advisory board for the Task Force. I am pleased that you and I had a chance to review those names during our phone conversation. We agreed on a core group of lay advisors to include yourself, Chuck Ratner, Charles Bronfman, and Ellie Katz. We mentioned Felix Posen as a possibility and agreed to think further of other lay leaders to invite.

Ideally, we should invite ten people to get a group of six to seven active participants. I am convinced that assembling this group will add immeasurably to the planning process as it offers the Task Force the crucial perspectives of communal leaders from across the continent.

At the May 31st meeting, we also agreed to look ahead to September, 1998, as a possible start-up date for the center for Jewish education that we hope to initiate at Brandeis. That would allow sufficient time for getting in place all the many elements on campus and in the community needed for a successful phase-in of this center.

During our conversation, we spoke of extending the planning process beyond the current one-year grant. I asked the steering committee to come up with a plan for extending the planning process and they have done so. They will be reviewing their plan with Alan and Barry this week and, after that review, will submit a more formal request. As it stands now, they see extending the current planning process with the Task Force through June, 1997, and will

Mr. Morton L. Mandel, Chairman
Mandel Associated Foundations
June 17, 1996
Page 2

seek to extend the current level of funding, with minor adjustments, for that added half-year. After June 1997, a more active pilot period would be needed to reach the start-up date of 1998.

As we have both reiterated, it is wonderful to see the partnership between us. This is most gratifying to me personally. With warmest regards from house to house,

Sincerely,

Jehuda Reinharz

JR:jg

Attachment

cc: Irving Epstein
Joseph Reimer
Susanne Shavelson
Alan Hoffmann
Barry Holtz

**STEERING COMMITTEE MEETING 12/5/96
PROPOSED AGENDA**

- | | |
|---------------|----------------------------|
| 9:30 - 10:15 | 1. Welcome |
| | 2. Calender Review |
| | 3. Minutes and Assignments |
| 10:15 - 11:30 | 4 Work Plan |
| 11:30 - 12:30 | 5 Strategic Plan |
| 12:30 - 1:00 | 6 Lunch |
| 1:00 - 2:00 | 7 CIJE Update |



FROM: Josie Mowlem, 102467,616
TO: Alan Hoffmann, 73321.1220
CC: Karen Barth, 104440,2474
DATE: 11/6/96 10:01 AM

Re: Copy of: Steering Committee

Steve Hoffman is coming into New York on Tuesday for other meetings. I called Chuck Ratner's office to try to get a feel for his schedule. He has a meeting the night before so his secretary was not sure what he would do.

There is an early flight so they could do it.

Here's a projected schedule if you start at 9:30 -- because I think it's doable.

9:30 - 10:15 ¹ welcome, ² minutes assignments

Check calendar - confirm scheduled of dates.

10:15 - 11:30 Work Plan

11:30 - 12:30 Strategic Plan

12:30 - 1:00 lunch

1:00 - 2:00 CIJE Update etc.

Let me know what you think. Josie

*Proposed
Agenda Dec 5 Steering com*

9:30 - 10:15

1. welcome

2. calendar review

3. minutes and assignment.

Chair
Morton Mandel

Vice Chairs
Billie Gold
Ann Kaufman
Matthew Maryles
Maynard Wishner

Honorary Chair
Max Fisher

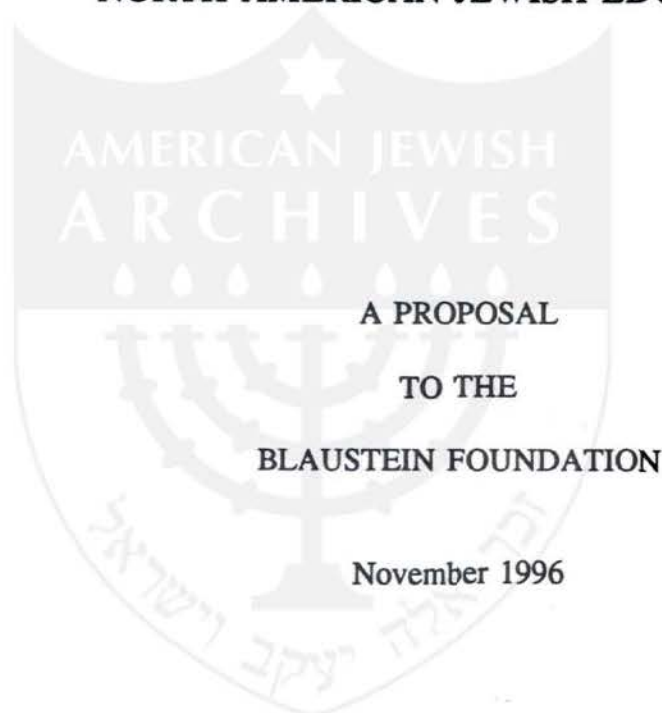
Board
David Arnow
Daniel Bader
Mandell Berman
Charles Bronfman
John Colman
Maurice Corson
Susan Crown
Jay Davis
Irwin Field
Charles Goodman
Alfred Gottschalk
Neil Greenbaum
Lee M. Hendler
David Hirschhorn
Gershon Kekst
Henry Koschitzky
Mark Lainer
Norman Lamm
Marvin Lender
Norman Lipoff
Seymour Martin Lipset
Florence Melton
Melvin Merians
Lester Pollack
Charles Ratner
Esther Leah Ritz
William Schatten
Richard Scheuer
Ismar Schorsch
David Teutsch
Isadore Twersky
Bennett Yanowitz

Executive Director
Alan Hoffmann

BUILDING EVALUATION CAPACITY

IN

NORTH AMERICAN JEWISH EDUCATION



November 1996

Submitted by the
Council for Initiatives in Jewish Education

1. Introduction and Overview

Evaluation is a pressing need in Jewish education. Throughout North America, Jewish educators are struggling to develop new resources and new strategies for strengthening Jewish teaching and learning. But, evaluation, a critical dimension of educational planning, is still neglected. The needs for evaluation are not understood; the challenges of evaluation are not accepted; the benefits of evaluation are not appreciated, both among education professionals and among communal leaders.

The Council for Initiatives in Jewish Education is deeply committed to the theory and practice of educational evaluation. CIJE board and staff believe that unless goals are clearly established and performance systematically monitored, feedback will be impaired and outcomes uncertain. If the Jewish educational enterprise in North America is to progress, then monitoring, evaluation, and feedback (MEF) must become an integral feature of Jewish education at both the national and local levels.

During the past three years, through the generous support of the Blaustein Foundation, CIJE has carried out a number of pilot MEF programs. These initiatives not only have helped CIJE to evaluate its activities, but also have informed CIJE's mission and strategy. One of the most important issues that emerged from the CIJE efforts was the need to promote a culture in which learning from evaluation is valued.

CIJE now seeks to expand its work in monitoring, evaluation, and feedback through three interrelated initiatives:

- 1) Setting an Example: Evaluation of CIJE's own programs most especially the Teacher-Educator Institute. CIJE must exemplify the MEF concept if we expect others to emulate our example.
- 2) Building Evaluation Capacity: Development of an Evaluation Institute which will create commitment to evaluation among educators and communal leaders and which will train evaluators for local communities.
- 3) Planning Ahead: In addition to implementing pilot programs and building capacity at both the national and local level, CIJE proposes to initiate a three-year planning process toward development of a National Center for Research and Evaluation in Jewish Education.

CIJE's MEF initiatives constitute the first integrated effort to transform the culture and capacities of Jewish education in this key area. We ask the continued participation of the Blaustein Foundation in this important effort over the next three years. A grant which provides annual support in the amount of \$175,000 will help CIJE to achieve its goals and to strengthen educational practice in local communities.

2. Project Background

From its inception, CIJE has been guided by the principle that initiatives in Jewish education need to be accompanied by evaluation. In this context evaluation has three basic purposes:

- 1) To make implementation of programs more effective.
- 2) To determine, after an appropriate period of time, whether a program is sufficiently productive to warrant further effort and resources.
- 3) To provide knowledge about what works--and how--so that successful programs can be adapted in different places.

CIJE has tried to operationalize this principle in its own programs and initiatives. CIJE's basic approach to the improvement and reform of Jewish education is predicated on intensive involvement in a small, carefully selected group of communities which will constitute 'laboratories of change' that can serve as models for other communities. For this CIJE strategy to be fully effective requires clear goals and a coherent sense of what we seek to achieve. Thus, the articulation of CIJE goals and systematic monitoring, evaluation and feedback establish the basis for assessing achievement and developing effective, replicable strategies.

CIJE has also tried to foster an "evaluation-minded" approach to educational improvement among its Lead Communities (Atlanta, Baltimore, and Milwaukee). In this effort we have had some success. However, community agencies typically lack the capacity to carry out systematic evaluations of their programs. Some communities simply do not know what to do. Other communities appear to avoid evaluation because they are over-committed or because evaluation often brings conflict and avoiding conflict is a high priority for agency staff. Still a third barrier is the paucity of qualified evaluators who can carry out knowledgeable, informative, and fair evaluations.

With support from the Blaustein Foundation, CIJE has integrated evaluation into its research, training, and consultations. Feedback from these initial efforts has had a profound effect on CIJE's own planning and strategies. Feedback has also helped the Lead Communities to direct their work. At this point, Federation staff at least pay lip service to the need to evaluate any new programs that are under consideration. More concretely, budgets for evaluation are being included in new programs. And, most importantly, key staff and lay leaders in all three communities recognize the value of basing decisions on substantive information rather than subjective impressions or anecdotal instances.

CIJE is now ready to expand on its initial efforts. Our research of the last three years shows clearly that the culture of many local Jewish communities ignores or evades evaluation. Even where communities are interested in program evaluation, they lack capacity to evaluate carefully, systematically, and fairly. It is the purpose of this project to increase both local and national capacity for monitoring, evaluation, and feedback and to plan ahead to the institutionalization of MEF in a National Center for Research and Evaluation in Jewish Education.

3. Recent MEF Achievements

During the past three years the CIJE monitoring, evaluation, and feedback (MEF) project has conducted systematic research in three Lead Communities to better understand their visions or goals for improving education, the backgrounds and training of Jewish educators, and the nature and extent of resources mobilized for educational reform. Community-based field researchers have gathered data on these issues from observation, interviews, and questionnaires. With these data in hand, CIJE's MEF staff and consultants have produced a substantial body of reports, policy briefs, and papers.

Among the most important work products of this first MEF effort are reports on the teachers in Jewish schools and the educational leaders in all three Lead Communities. The reports contrasted the stability and commitment of Jewish educators with their lack of preparation and limited professional growth. Based on these findings, the Lead Communities have taken new steps to improve the training and professional lives of Jewish educators. For example, Milwaukee has initiated a distance education collaborative with the Cleveland College of Jewish Studies, and Baltimore is considering up-graded benefits packages for full-time Jewish educators.

The MEF research effort has produced a number of new instruments which have now been revised and compiled in a Manual for the CIJE Study of Educators. The main components of the Manual are a questionnaire for educators, interview protocols for teachers and educational leaders, and coding instructions for field researchers. The Manual is ready for use, and Seattle, Cleveland, and Chicago have already carried out studies of their educators using the CIJE instruments. Several other communities are currently contemplating studies based on our Manual for the CIJE Study of Educators. Eventually, data collected in all the participating communities will become part of a North American database on Jewish education, a valuable resource for future policy research.

CIJE itself has organized two new national programs in response to the MEF research--the CIJE Leadership Seminars at Harvard and the CIJE Teacher-Educator Institute. CIJE's local and national initiatives are now working in concert to create systemic reform in Jewish communities. The Lead Communities are major participants in the CIJE national programs. For example, Atlanta has sent two supplementary school directors to the Leadership Seminars, and its central agency staff and a supplementary school director are enrolled in the Teacher-Educator Institute. As a result, new ideas for the professional development of educators are blossoming in Atlanta, and CIJE's ongoing evaluation will document the changes that are occurring in Atlanta and the other Lead Communities.

MEF research in the Lead Communities has shown the need for a CIJE Manual for Program Evaluation. The Manual, now in development, will provide guidance for program evaluation at the community level. However, the Manual will be fully effective only if we can increase capacity for evaluation in the local communities. Even where funds are available, expertise and will are in short supply. Accordingly, CIJE proposes to initiate an Evaluation Institute which will develop evaluation capacity among lay leaders, educators, and a cadre of evaluation associates.

4. Building Evaluation Capacity

For monitoring, evaluation, and feedback to have a significant impact in the planning and practice of Jewish education, it is necessary to create a context in which lay and educational leaders are supportive of MEF. At present, significant numbers of educators, lay leaders and funders feel unsure about what is "working" with respect to their long and short-term educational goals. They may know, for example, whether students like or dislike a program, but this information does not tell them about the extent to which or for whom the program is achieving its goals. Jewish educators are not alone in this concern; those involved in general education are often puzzled about the impact of their own programs and practices.

Lacking information about the connections between programs, practices and outcomes, educators, lay leaders and funders have difficulty setting priorities, making decisions, and developing arguments with which to convince each other and constituents about their programmatic choices. Data generated from systematic program evaluation can provide information about program effectiveness. With that information, all interested parties can be in a better position to make informed decisions about improvement, continuation, and support.

CIJE will continue to refine and enhance evaluation of its own programs, notably the Teacher-Educator Institute. Lastly, CIJE intends to institute long-range planning for a new National Center for Research and Evaluation in Jewish Education. Together, these related efforts will help to create long-term capacity for evaluation at both the local and national levels.

We also need to develop a cadre of trained professionals who have insight into the workings of the American Jewish life and who are capable of carrying out effective program evaluation. CIJE proposes a CIJE Evaluation Institute as the centerpiece of our new initiatives in the area of evaluation. The proposed evaluation institute will engage communal leaders and educators in the process of evaluation within their own communities and will develop professional evaluation associates in the participating communities who can carry out systematic program evaluation within the community. The Evaluation Institute will create local evaluation capability and create a national network of evaluation advocates and practitioners.

A. The Evaluation Institute

Recent CIJE studies clearly show that monitoring, evaluation, and feedback are poorly understood concepts among both lay and educational leadership at the local level. Even when the concept of evaluation is accepted by community and educational leaders, commitments to evaluation are limited and resources for evaluation are modest. For many communal and educational leaders, the term "evaluation" is synonymous with compliance and accountability and conjures up feelings of fear. Certainly, evaluation information can and should be used for such purposes. However, in proposing the establishment of an Evaluation Institute we are proposing a strategy that will enable educators, lay leaders and funders to value multiple uses of data. In

short, both the culture and the capacity for evaluation need to be radically altered. CIJE proposes an Evaluation Institute that works to transform the culture of Jewish educators, lay leaders and funders into one that values learning from research. The result should be Jewish education that is more effective in accomplishing the goals of those who fund and provide it.

To these ends, CIJE will plan and organize an Evaluation Institute which will draw on three bodies of knowledge and expertise: the first is the field of evaluation with its distinct methodologies and aims, challenges and possibilities; the second is knowledge of Jewish communal life in North America; and the third is new information and approaches developed in recent CIJE initiatives with the Lead Communities, notably the Manual for the CIJE Study of Educators and the CIJE Manual for Program Evaluation in Jewish Education.

The Evaluation Institute will comprise two related seminars. Each of the seminars will have distinct content, but participants in the two programs would meet together. This will ensure that those who "know" the context and those who "know" about evaluation teach and learn together. The CIJE Evaluation Institute will, therefore, facilitate discourse among communal leaders--lay and professionals, Jewish educators, and evaluation specialists. The component seminars CIJE proposes are as follows:

Seminar I: The Purpose and Possibilities of Evaluation

This two-session seminar is intended for Federation professionals, lay leaders and education professionals from participating communities. Its purpose is to help these leaders understand the need for evaluation, as well as its limits and possibilities. Participation will provide local Jewish communities with the advocates for evaluation that will help ensure MEF's role in community decision-making.

This seminar will engage teams of teachers, principals, and lay leaders from four to six selected communities. An Evaluation Institute representative will visit each participating community in advance of the seminar to consult with participants on key issues for which evaluation is needed in that community. This initial consultation will help the community to understand the kinds of questions that can and cannot be answered with data and to distinguish the kinds of questions that require long-term study from those that can generate more immediate usable information. The consultants will help the participants to define their own pilot evaluation project for application in their community.

The first session of the Evaluation Institute will convene the participants for an initial three-day seminar and workshop on program evaluation designed to develop inquiry skills and defines the uses and limitations of evaluation research. The workshop will encourage participants to learn by doing their own small-scale projects. Each team of participants will design a small-scale, short-term evaluation project to be piloted in their community; the team will leave the Institute with a data collection strategy and an understanding that they have the ability to ask systematic questions that will help them in their work. Institute staff will be available to provide guidance and counsel for the pilot projects.

The participating teams will re-convene for a second workshop session to learn how to analyze the data from their local pilot projects and how to draw implications from them. While not all of these exercises will produce significant data or informative analyses, participating in the process of evaluation will help the team to understand the possibilities and limitations of program evaluation. The participants will be asked to provide the Institute with feedback and to report to key constituents on their findings and experience.

We expect the Institute workshops and community consultations to produce a cadre of informed, committed evaluation advocates, lay and professional, in each of the participating communities. For this process to be fully effective, the Evaluation Institute staff will need to stay in touch with the participants in each community. Staff and consultant time is therefore allocated for on-going consultations and maintenance of the network of evaluation advocates and evaluation associates.

Seminar II: Evaluation in the Context of Jewish Education

The purpose of this seminar is to engage program evaluation experts in each participating community in discourse about the specific needs of MEF in Jewish education. Participants in the seminar will be program evaluation experts and social science researchers with the Ph.D. who are experienced in research on education, communities, public agencies or related areas. Through this seminar the participants will be oriented to the distinctive contexts and culture in which Jewish educational reform operates in North American communities with special attention to the politics of evaluation in the organized Jewish communities.

The seminar will provide a training program on the special issues associated with evaluating Jewish education and assist participants to function as a source of evaluation expertise for their local communities. This will enable participating communities to engage experts in long-term, ongoing relationships, assuring continuity in their MEF efforts. In addition, by entering into a relationship with a local expert, organized Jewish communities can exhibit their commitment to take evaluation seriously.

The Evaluation Institute will invite prospective evaluators to participate in a special training seminar and also to work with CIJE staff and consultants in the two-part seminar for communal and educational leaders. The latter will offer advocates and evaluators the opportunity to work together and to create the basis for ongoing collaboration in future. The Evaluation Institute will invite evaluators to become CIJE Evaluation Associates, participants in a network of program evaluators trained to work in the Jewish community.

B. Assessing CIJE Initiatives: The Teacher-Educator Institute

It is also important for CIJE to strengthen assessment of its own ongoing programs, even while building evaluation capacity in local communities. As a prominent exponent of Jewish educational reform, CIJE is obligated to exemplify the best principles and practices of education, including monitoring, evaluation, and feedback. MEF initiatives are essential if CIJE is to document effective programs and to disseminate information about them to a national constituency; they are also valuable for CIJE's own planning and program development.

The CIJE Teacher-Educator Institute (TEI) is a major effort to build the profession, and its evaluation is therefore a major focus of CIJE's MEF commitment. TEI is a multi-year project to create a cadre of outstanding teacher-educators for supplementary Jewish education. Data from the CIJE Lead Communities clearly indicates that professional development programs are infrequent, and their quality is inadequate to meet the challenges of Jewish education. The project brings together teams of educational leaders from communities across North American, including school directors and central agency personnel. These outstanding leaders will form both national and local networks of teacher-educators who share a vision of teaching and learning and who support one another in instituting new models of professional development. Participants will also provide enhanced professional development for the educators of their schools and communities.

Evaluation of TEI will focus on a wide range of outcomes for communities, schools, and TEI participants. At the communal level, CIJE will examine changes in the extent and quality of opportunities for professional development in five communities. In two of these communities CIJE will carry out intensive case studies of changes in the contexts, activities, and beliefs about professional development, and in two schools we will evaluate opportunities for teachers' professional development as compared with the standards articulated by TEI. For individual TEI participants, we will study how the professional development opportunities they design and implement have changed as a result of participation in TEI. The following studies will be conducted through surveys, interviews, and observations:

Study of Professional Development Programs: To assess changes in programs CIJE will compare programs that currently exist to programs established in response to TEI. In contrast to most ongoing programs--which are typically infrequent, isolated, and fragmented--TEI intends to foster new understandings in which particular professional development programs are part of a coherent overall program. By working with key teacher-educators TEI expects to bring about changes in the quantity and quality of professional development in participating communities. The TEI approach will focus on targeted populations, empower participants to learn from their own practice, establish bridges to classrooms, and strengthen relations within and among institutions.

To assess baseline conditions, CIJE has recently distributed a Professional Development Program Survey to central agency staff and supplementary school principals in participating communities. This new data will be combined with information previously

gathered from the Lead Communities to yield a rich portrait of professional development programs early in the TEI process. The surveys will be re-administered in the third year of assessment to monitor changes in professional development programs in five targeted communities.

In addition to the surveys, CIJE will interview TEI participants from five selected communities to document changes in their thinking and practices of professional development. This analysis will uncover the mechanisms through which changes occur in professional development opportunities. The interviews will reveal how TEI participants understand their roles as teacher-educators, how those roles may change, and how participants are working to create more meaningful growth for educators in their schools and communities.

Intensive Case Studies: The potential success of TEI lies only partly in formal programs for professional development. Evaluation is needed to understand the multiple ways in which TEI can promote professional growth. Informal interactions between principals and teachers, for example, can be an important source of professional development. TEI participants and those affected by TEI participants may become more adept at learning from their own professional practices. To examine these kinds of subtle changes, we will need to conduct in-depth analyses that reach beyond surveys and interviews.

CIJE will conduct intensive case studies in two communities to assess changes in the extent and quality of professional growth in both formal and informal activities. The two communities selected for study will have participants from both central agency staff and from the supplementary schools working as teams, since these partnerships offer the kinds of support through which positive changes are most likely to occur. The case studies will include interviews with key participants and observations in selected schools.

Reports from these evaluation efforts will provide feedback to TEI planners and leaders about the effectiveness of the TEI initiative; they will also provide information to local and national Jewish audiences who are interested in implementing or participating in similar programs.

C. Toward and National Center for Research and Evaluation

A basic goal of CIJE, first articulated in A Time to Act, is the building of a capability for research and evaluation of Jewish education in North America. With the generous support of the Blaustein Foundation, CIJE has taken important first steps in that direction. If further support enables CIJE to realize the program described in this proposal, we will be ready by 1999 to move onto a new level of capacity-building: creation of a national infra-structure for effective research and evaluation in Jewish education.

During the next three years, building on the base of recent achievements, CIJE will have served as a catalyst for developing a working cadre of community evaluation specialists, for creating a national database on Jewish educators and Jewish education, and for mobilizing community support for ongoing, systematic monitoring, evaluation, and feedback. Three years from now, the CIJE effort will shift from particular MEF initiatives to the establishment of a National Center for Research and Evaluation, perhaps affiliated with a leading research university, that will provide an institutional framework for research and evaluation in Jewish education.

Accepting this as a long-term goal and initiative, CIJE proposes to use the next three years to gather ideas and recommendations for the organization of the National Center and to develop the Center's mission statement, program goals and objectives, organizational plan, and operating budget. It is important that when the time is ripe for the establishment of the National Center for Research and Evaluation in Jewish Education, a thoughtful, substantive plan be in place, ready for implementation.

This planning effort will require intensive consultations with communal leaders, Jewish educators, experts in research and evaluation, and development specialists. During the next three years, with support from the Blaustein Foundation, CIJE will convene a series of planning meetings, conference calls, and brainstorming sessions to develop a master plan for the proposed National Center. The CIJE planning initiative will make use of CIJE lay and professional leadership, the team of expert consultants who are carrying out the MEF initiatives, participants from the Lead Communities and other communities represented in the Evaluation Institute and the Teacher-Educator Institute. Together, these committed lay and professional leaders will develop a phased plan for the National Center that can help to launch Jewish education on a new course in the 21st century.

5. MEF Project Personnel

CIJE is deeply committed to monitoring, evaluation, and feedback in Jewish Education. Because of this commitment, CIJE board and professional leadership will be actively involved in oversight of each MEF initiative described in this proposal. The CIJE board has carefully reviewed MEF programs to date, and will continue to do so in the proposed three-year grant period. CIJE will also employ its Evaluation Advisory Committee--a distinguished panel of scholars, evaluators, lay leaders, and educators--to refine the CIJE MEF project.

Three nationally outstanding educational evaluators will work with the CIJE staff in the realization of the proposed initiatives. Each of these distinguished scholars brings to the project a wealth of professional experience and abiding commitments to the cause of Jewish education. Their participation will ensure that the MEF programs will conform to the highest standards of American educational and scholarly practice while infusing the evaluation of Jewish education with the methodologies of general education. The three principal consultant-investigators are:

Adam Gamoran is Professor of Sociology and Educational Policy Studies at the University of Wisconsin, Madison. Dr. Gamoran has been Co-Director of Monitoring, Evaluation and Feedback for CIJE since 1991 and is co-author of Background and Professional Training of Teachers in Jewish Schools and Teachers in Jewish Schools, both published by CIJE. Dr. Gamoran is a specialist in educational policy, the sociology of American education, and program evaluation. In this project he will co-direct the evaluation of the Teacher-Educator Institute and participate in developing plans for the National Center for Research and Evaluation in Jewish Education.

Ellen Goldring is Professor of Educational Leadership and Associate Dean of Peabody College at Vanderbilt University. Dr. Goldring has served as Co-Director of Monitoring, Evaluation, and Feedback for CIJE since 1992. She is the co-author of Principals of Dynamic Schools: Taking Charge of Change and other articles on educational leadership and school re-structuring. She is also a co-author of Background and Professional Training of Teachers in Jewish Schools and Teachers in Jewish Schools. Dr. Goldring is an expert in change management, educational leadership, and program evaluation. In this project she will co-direct the evaluation of the Teacher-Educator Institute and participate in developing plans for the National Center for Research and Evaluation in Jewish Education.

Barbara Neufeld is President of Education Matters, Inc. and a lecturer on administration, planning and social policy at the Harvard Graduate School of Education. Dr. Neufeld is an expert on the evaluation of school improvement efforts. Dr. Neufeld is the author of numerous reports and papers; she co-authored Professional Development Schools in Massachusetts and contributed to Professional Practice Schools: Linking Teacher Education and School Reform and Better Schooling for the Children of Poverty. Dr. Neufeld will direct the CIJE Evaluation Institute and participate in developing plans for the National Center for Research and Evaluation in Jewish Education.

6. Plan of Work

The proposed CIJE monitoring, evaluation, and feedback initiatives will be realized over a three-year period, January 1997 through December 1999. Work on the Evaluation Institute, the CIJE program evaluation, and planning for the National Center for Research and Evaluation will continue throughout the three-year period. Work time and budget will shift slightly from 1997 to 1999 as the start-up costs of the Evaluation Institute decline and as planning intensifies for the National Center. The workplan proposed here is predicated on close cooperation among the CIJE staff and consultants and on integration of knowledge and research from all CIJE initiatives.

Year One (1997)

In the first year of the proposed grant period, CIJE staff and consultants will devote major attention to planning and development of the Evaluation Institute. Work on assessment of the Teacher-Educator Institute will continue apace, and planning for the National Center for Research and Evaluation in Jewish Education will come on-line in the second half of 1997. Specific tasks are as follows:

- Planning and organization of the Evaluation Institute (EI) in consultation with CIJE board, staff, and consultants, and with communal and educational leadership in local communities; recruitment of Institute staff and participants; implementation of the first integrated series of seminars in Fall 1997.
- Completion of the CIJE Manual for Program Evaluation and completion of reports on CIJE's Teacher-Educator Institute based on the 1996 TEI program; consultations with the Lead Communities (Atlanta, Milwaukee, and Baltimore) and with Chicago, Kansas City, Cleveland, Madison, and Columbus.
- Implementation of the Intensive Case Studies; observations in Atlanta and Baltimore and interviews of Cohort I and Cohort II TEI participants; drafting of interim TEI evaluation reports.
- Initiation of planning for the National Center for Research and Evaluation in Jewish Education; recruitment of the planning team; consultations with community leaders, Jewish educators, and academic scholars; convening of initial planning meeting and brainstorming sessions (conference calls).
- Preparation of first annual progress report and evaluation; review by CIJE staff and board; submission of revised reports to CIJE and the Blaustein Foundation.

Year Two (1998)

In the second year of the grant period evaluation efforts will continue on all three initiatives. The CIJE Evaluation Institute will recruit and train a second cohort of advocates and evaluation associates, while maintaining ties to the first-year participants. TEI and related program evaluation will continue, and planning for the National Center for Research and Evaluation will intensify as ideas and recommendations are focused and refined. Specific tasks are as follows:

- Continuation of the Evaluation Institute (EI) seminars with Cadre 1; recruitment of a second cadre of participants--from both old and new communities--for the EI; networking and consultations with communal and educational leaders and evaluation associates.
- Ongoing data collection for the Intensive Case Studies; observations in Atlanta and Baltimore; interviews of TEI participants and educators with whom TEI participants work (i.e., teachers and principals); drafting of the second interim TEI evaluation report.
- Community consultations (Atlanta, Baltimore, Cleveland, Milwaukee, and others); collection of data on characteristics of educators in Jewish schools.
- Planning for the National Center for Research and Evaluation in Jewish Education; preparation of written planning pieces; invitational planning meeting of academic researchers in general and Jewish education; consultations on using large databases for studying Jewish education and its effects.
- Preparation of a Policy Brief on professional development in Jewish education in conjunction with CIJE senior staff.
- Drafting of a second annual progress report and evaluation review by CIJE board and staff; submission of revised reports to CIJE and the Blaustein Foundation.

Year Three (1999)

In the third and final year of the proposed grant period, CIJE staff and consultants will complete planning for the National Center for Research and Evaluation in Jewish Education. Evaluation of the TEI and related programs will continue, and the CIJE Evaluation Institute will work with its third cohort of communal and educational leaders and evaluation associates. By the conclusion of this year, CIJE will have developed a national network or infrastructure of evaluation associates who will share in the work of program evaluation within the participating communities. The National Center for Research and Evaluation will mark the next stage of program development for which CIJE will serve as a catalyst and consultant. The primary tasks of this year are as follows:

- Continuation of the Evaluation Institute seminars with Cadre 2; recruitment of a third cadre of participants--from both old and new communities--for the EI; networking and consultations with communal and educational leaders and evaluation associates.
- Follow-up surveys of professional development activities in selected TEI participant communities.
- Drafting and editing of TEI evaluation reports, studies of professional development programs, and Intensive Case Studies.
- Community consultations in Atlanta, Baltimore, Cleveland, Milwaukee, and other communities.
- Completion of planning for the National Center for Research and Evaluation in Jewish Education; consultations with academic researchers, community leaders, and Jewish educators; preparation of a mission statement, program descriptors, implementation plan, and cost estimates; convening of an invitational meeting to review and refine the final planning report.
- Ongoing evaluation of TEI and related CIJE programs; interviews and observations with participants and with teachers and principals in the participating communities.
- Preparation of the third annual progress report and final project report; review by the CIJE board and staff; revision and submission of the revised reports to CIJE and to the Blaustein Foundation.

By the completion of the third year, CIJE will have significantly increased both national and local capacity to undertake program evaluation in Jewish education. CIJE's long-range goal is to alter the culture of Jewish education and communal decision-making so that evaluation becomes an educational strategy integral to Jewish education. In short, CIJE proposes to help develop a national network of inquiring educators, communal leaders, and evaluators who are committed to understand and use effective educational evaluation.

In this important enterprise CIJE asks the support and participation of the Blaustein Foundation.