



THE JACOB RADER MARCUS CENTER OF THE
AMERICAN JEWISH ARCHIVES

MS-831: Jack, Joseph and Morton Mandel Foundation Records, 1980–2008.

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

Subseries 1: Meetings, 1990–1998.

Box
18

Folder
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Barth, Karen. Meeting. 3 August 1998, 1998.

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

LP/KAB
August 3, 1998

1. Sector
2. Workplan & Budget #1, #2
3. Communication Plan #3
4. Audit
5. Updates
 - Recruiting
 - Accountant
 - Legal



CIJE 1999 WORKPLAN

DRAFT AUGUST 3, 1998



CRITICAL PATH PROJECTS

- 
- JEWEL “STARS” PILOT
 - CFWW LAUNCH
 - THE FORUM
 - FIELD SITE PILOT

**IN-PROCESS PROJECTS THAT ARE ALSO CORE TO THE
STRATEGY/NOT CRITICAL PATH**

- TEI
- INDICATORS
- RABBINIC CONFERENCE
- HIGH SCHOOL LEADERS
- BALTIMORE LAY LEADERSHIP



**PROJECTS TO BE REDUCED, COMPLETED, POSTPONED OR PHASED
OUT**

- Ha Shaar – Complete in 99
- TuM – Reduce
- Early Childhood – Reduce to Research only



SUPPORT PROJECTS

CORE PROJECTS	CRITICAL PATH				EARLY CORE PROJECTS					PLANNING PROJECTS	
	Jewel Pilot	Forum	CFWW	FS	*Indicators	*TEI	HS Leaders	*Rab Conf	*Balt.	Jewel	Early Childhood
RESEARCH <ul style="list-style-type: none"> Econ of Jew Ed. SyN change Res Change Think Tank Lay Leadership Res. Rabbi's Survey Best Practice in Rabbinic Ed 	✓ ✓ ✓ ✓	✓ ✓ ✓ ✓	✓ ✓	✓ ✓		✓	✓	✓ ✓	✓ ✓ ✓		
PUBLICATIONS <ul style="list-style-type: none"> Policy Brief on Prof Dev SyN Change Beit Rabban 		✓									
	✓	✓	✓	✓							

*committed

DRAFT

DRAFT

DRAFT

Message for communicating the sector initiative (by phone or in person)

- The Mandel Foundation is re-organizing in order to expand its impact in the areas in which it is working.
- There will be three sectors: *Jewish Education and Continuity; Urban Neighborhood renewal; Leadership Development and Non-profit Management.*
- The Foundation will be intensifying its already large commitment to Jewish education.
- The major projects of the foundation ("wholly owned subsidiaries") will become operating arms of the foundation and hence will be respectively renamed "the Mandel Foundation/ Israel" - formerly the *Mandel Institute* and "the Mandel Foundation/ New York" -formerly the *CIJE*.
- Professional education endeavors in Jerusalem will all work under one umbrella, the Mandel School for Professional Leadership (under whose auspices will operate the School for Educational Leadership; Jerusalem Fellows; Executive Development Program; Senior Civil Service program and Ph.D. Fellowship program).
- Prof. Seymour Fox has been appointed head of the Jewish Education and Continuity Sector. The Sector's initiatives will be coordinated globally.

Proposed Initial Communications Plan

To Whom	Message	Who Does It	When	How
FOUNDATION BOARD	See Attached	MLM	DONE?	Personal calls to those who don't know
II BOARD	See Attached	MLM STAFF	AUGUST	MLM personal calls to Posen, Burak, Tadmor, Stock Staff Calls Joffe, Marks, etc./ Ritz, Pollack, done?
IJE BOARD Lee Hendler	See Attached	MLM	ASAP	Personal Call to Lee Hendler - all others done?
IJE STAFF	See Attached	MLM/SF	AUG 10th	Meeting
ISRAEL STAFF	See Attached	MLM	AUGUST	Letter from MLM *
CONSULTANTS & TEACHERS	See Attached	MLM	AUGUST	Letter from MLM *
MINISTRY OF EDUCATION	See Attached	SF	AFTER AUG 15th	Meeting with Minister of Education & Director General Senior Staff
MINISTER OF FINANCE	See Attached	MLM	AUG/SEP	MLM personal call or letter*
IJE FUNDERS	Message to be crafted by Ruder- Finn	Lester/MLM	AFTER AUG 15th	Letter from MLM *
EL/CAPE FUNDERS	Message to be crafted by Ruder- Finn	MLM	AUGUST	Personal calls MLM/SF

* Letters to be drafted by MI and CIJE

Proposed Initial Communications Plan

to Whom	Message	Who Does It	When	How
<p>RIENDS, GRADUATES & KEY LAYERS IN JEWISH ED. (e.g. Alan Finkelstein, Reynold Levy, Levora Steinmetz, Beverly Gribbetz, Josh Elkin, Shorsh, Zimmerman, Bramson)</p>	<p>Message to be crafted by Ruder- Finn</p>	<p>MLM</p>	<p>AFTER AUG 15th</p>	<p>Letter *</p>
<p>THE COMMUNITY (US, ISRAEL, OTHER)</p>	<p>Message to be crafted by Ruder- Finn</p>	<p>Ruder-Finn?</p>	<p>NOVEMBER</p>	<p>Press Release</p>

* Letters to be drafted by MI and CIJE

LP/KAB
9/9/98

1. Update on Sector / MLM

2. Chairman's Council

3. Foundation Research

4. Amy Stein

5. Update on JEWEL and Consulting Firm

#1

#2, #3



DRAFT - #1

Lester Pollack
Centre Partners Management, LLP
30 Rockefeller Plaza
Suite 5050
New York, NY 10020

DATE

Dear _____:

I am happy to report to you that the Mandel Foundation has decided to reorganize its philanthropic activities in North America and around the world, with the goal of ensuring continuity for the Foundation's work in the future. We at CIJE are deeply involved in creating a plan to strengthen and intensify the activities of the Foundation in the area of Jewish Education. With so many changes in the works, we have decided to postpone our Chairman's Council breakfast, which was scheduled for October 22nd.

We will get back to you with a date as soon as possible. I look forward to seeing you then and to updating you on these exciting developments.

Regards,

Lester Pollack

MANDEL CONSULTING GROUP, INC.

- “Executive Director”: President, CEO, Managing Director. Time split: Managing, Consulting
- Core group of consultants
- ??? Other consultants
 - Resource group
 - “Network”
 - Affiliates
 - Jewish?
- Professional Development program open to more
- Tools; intellectual property
- Work with Direct Service and Umbrella Jewish Education (JE) Institutions to bring about...
- Paid market fee for service
- Legal, tax, organizational structure and financial structure
- Client criteria?
 - They can be helped
 - Not necessarily ability to pay (scholarships)
 - Working at correct level / decision-maker
- Connected to Mandel Leadership Center
- Sources of funds
 - Mandel Foundation - Professional manpower, start-up, overhead
 - Fees → consultants
 - Other philanthropists → scholarship, grants, direct to institutions
- Geography
 - Start with East - NY, Boston, DC, Cleveland, Baltimore, etc.
- Back office support

CONSULTANTS - Advantage

- Mandel Group - 1st contact, provides education resources
- Leads → clients
- Peak loading
- Tools
- Collections / Administration
- Mandel - name / connection
- Colleagues
- Joint-billing
- Acknowledgement / recognition
- Exclusivity
- “Quality” consultants; “IBM factor”
 - The name
 - Name brand
 - Not “consultations”
- Training
- Benefits
- Communications
 - PR
 - Materials production



Foundations

Organization	Location	Contact	Responsibility	Timing	Next Steps	Comments
✓ MegaGivers Group		Jeff Solomon-Bronfman				- 16 different arenas - Tobin
Wexner		Fern Kattleman				Has hired consultant to do evaluation
✓ Nathan Cummings		Rachel Cowan Charlie Halpern				
Moriah Fund		Mary Ann Stein				
Revson		Lisa Goldberg				
✓ Speilberg		Margery Tabankin				
Covenant Foundation		Judith Ginzburg				
✓		Lee Hender (Meyerholt)				
Lilly Foundation		Bob Lynn				Episcopal Alban

Consulting Work

- Internal work
 - Operating programs
 - Strategies
- Grantees

Same questions, with revisions as foundations

Others - Big, but not mega

- Gruss - Ezra Merkin
- Henry and Edith Everett
- Michael Rukin - Boston
- Ira Stone?

Federations

Organizations	Location	Contact	Responsibility	Timing	Next Steps	Comments
✓	NYC	John Ruskay Aliza Kurschan				
✓	Cleveland	Steve Hoffman Mark Gurvis				
✓ Federation (CJP) Consulting Firm for Synagogues	Boston	Carolyn Keller Barry Schrage				
✓	Detroit Miami	Mandell Berman David Page (Lay) Bob Aronson Jacob Solomon				
✓	Mexico England	Schmuel Ben Alal				

Internal organizations

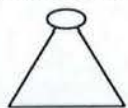
- How would you use MCG to help direct service institutions or continuity commission or bureau in your community?

How have

- 1
- 2
- 3
- 4
- 5

How would

- Who was the best
- How find
- What did you pay
- Why satisfied



- Where else

National Institutions

Organizations	Location	Contact	Responsibility	Timing	Next Steps	Comments
✓ HUC		Norman Cohen				CIJE past client
Brandeis		X				
JESNA						
✓ Hillel		Richard Joel				
JTS						
✓ PEJE		Josh Elkin				
✓ Boston Hebrew College		David Gordis				
✓ National Umbrellas - JCCA Federations		Mark Cherendorf				
Yeshiva University		Bob Hirt				
Jewish Life Network		Yitz Greenberg				

- Use of consultants
- Whole range of issues
- 2 Levels
 - Internal
 - Members / affiliates
- Same, but revised questions

Consultants

Consultant	Location	Organization	Responsibility	Timing	Next Steps	Comments
✓ Len Schlesinger						
✓ David Schnall						Orthodox world
Laurie Neimark		M2				
✓ Peter Geffen						Consulting to Day Schools; Good educator
Nancy Axelrod						
✓ Rabbi Elias						Rest of the Orthodox world
✓ Michael Hammer						
Heather Booth						
Si Kahn						Social justice
✓ Sally Gottesman						

Different Question

- Understand their experience in working with Jewish Community

Consulting Firm Models

Organization	Location	Contact Name	Responsibility	Timing	Next Steps	Comments
✓ M2		Laurie Neimark				
McTemps	Chicago					
✓ Technical Advisory Group		Liz Curtis				
✓ MAG		Susan Gross				Nonprofit
✓ ISM (Independent School Management)						
✓ Ford Foundation						\$, MAG, Social action
✓ Robin Hood		Lisa Smith				
✓ NX Consulting Partners		Liz Haas (MCK. alumna)				
Support Center		Terry Williams				
✓ Alban Institute						

Institutions: Synagogues

Organization	Location	Contact Name	Responsibility	Timing	Next Steps	Comments
Chizuk Amuno	Baltimore	Lee Hendler R. Joel Zaimin ✓				
Fairmont	Cleveland	(ask Mark Gurvis) ✓				
Valley Beth Shalom	LA	R. Ed Feinstein				
White Plains	NY	R. Gordon Tucker				
Rodeph Shalom	NY	Exec. Dir.				
Reform Movement		Dan Friedlander ✓				
Lincoln Square Synagogue		Adam Mintz ✓				
NY Federation	NY	Michael Paley ✓				

- 1) Formal education program
- 2) Broader vision and development of the synagogue
- 3) Fundraising
- 4) Same 4 questions tried to build a congregation around education

Institutions: Schools

Organization	Location	Contact Name	Responsibility	Timing	Next Steps	Comments
Agnon	Cleveland	Ray Levy ✓				
Big Tradition						
Start-up School		✓				
A school system		✓				
JCC's						
JCC of Columbus	Columbus	Joel Dinkins ✓				
92 nd St. Y	NY	Saul Adler ✓				

- List of questions
- Same overall as Federations



Institutions: Camps

Institution	Location	Contact Name	Responsibility	Timing	Next Steps	Comments
Sunrise Lake		John Ruskay ✓ can tell us				
Camp Ramah		Shelly Dorph ✓				



NEXT STEPS

1. Charts

- Potential clients
- Potential consultants
- Model Firms

2. Determine next steps

3. Interview guides

- Type rough notes from charts
- Revise

4. First Meeting

- Early Meeting--Early December
- Big Meeting--January-February
- Number of people
- Location

5. Draft Intro. letter

			NEXT STEPS	TIME	RESP.

July, 98

We are writing to share the activities we have implemented during the past few months to facilitate our ongoing planning efforts toward the creation of a North American Center for Jewish Educational Leadership (JEWEL).

THE NEED

It has been clear to all of us for some time that there is a need in the North American Jewish community for such a Center for both lay and professional educational leaders, which can deal with recruitment, preparation and development programs, and placement.

There is a shortage of prepared senior leaders who can inspire, shape, alter and transform communities, institutions and people. Current programs leave important gaps: On the professional side, as our own CIJE study of educators found, only 35% of school leaders have formal preparation in both education and Judaic Studies, while only 27% have a degree or certification in administration or leadership. Furthermore, there are limited opportunities for in-service development for senior leaders and for people changing careers. There are few development programs targeted for lay leaders in Jewish education and there are few organized efforts to recruit lay people into the field.

THE CONCEPT

We have sponsored a number of consultations that have focused on the fundamental issues in the development of Jewish educational leadership today. Our consultations include close collaboration and deliberations with our colleagues at CAPE and the Mandel Institute. We have called upon additional outside experts including Professors: Michael Rosenak, Hebrew University; Judith McLaughlin, Harvard University; and Mike Milstein, University of New Mexico.

These consultations have been instrumental in helping us begin to develop a foundation of ideas that could inform an approach to leadership preparation and development for North America.

These ideas include:

- This center must establish an ongoing link between ideas, scholarship and feedback from the field.
- Our approach rests on integrating Jewish text study with the development of a personal vision **of leadership and specific leadership tools.
- Our approach affirms the importance of linking institute activities with ongoing mentoring and supports in the field.
- The center should provide opportunities for the preparation and development of both lay and professional leaders jointly and separately.

These consultations have lead to an initial conceptual plan that outlines what a National Center for Jewish Educational Leadership may entail:

Such a center would provide an integrated approach to the recruitment, placement and development of senior lay and professional leaders who are able to vitalize, energize and

influence Jewish education in North America. The target groups to be served will include both current and potential professional and lay leaders.

The center will have three closely linked functions:

- recruitment and placement
- leadership preparation and development
- planning for personnel needs

Examples of possible programs in these areas could include:

Recruitment and Placement

1. Matching searches
2. Databases, web sites
3. Career counseling and planning

Leadership Preparation and Development

1. Long term programs
2. Fast track fellows programs
3. Alumni networking
4. Seminars for leaders of training institutions
- 5 Teacher Education Institute

Personnel Planning

1. Community/ Institutional consultations
2. Conferences

PLANNING PROCESS

We are in the middle of the first phase of our planning process for JEWEL. We are pleased to report that our colleagues at CAPE and the Mandel Institute have agreed to join us in this planning effort.

To date we have begun a number of data gathering activities.

1. We have commissioned papers to review the field of leadership preparation and development in four domains (not in the Jewish world):

- a) educational leadership – Mike Milstein, Professor of educational leadership, University of New Mexico
- b) business – Terry Bacon, President, Lore International
- c) board/lay leadership development – Nancy Axelrod, Vice President, A.T. Kearney (global management consulting executive search firm)
- d) not-for-profit/public service – Dennis Young, Professor of non-profit management, Case Western Reserve University

2. Additionally, we are mapping the current leadership development offerings in the Jewish

community for both lay and professional leadership. Sally Gottesman, a freelance consultant and researcher with extensive experience working in the Jewish community, is working with Karen Barth and Ellen Goldring on this phase of the work.

3. Pearl Beck, who is a senior research fellow of the City University of New York, has begun to research lay leadership in Jewish education to better understand what are current practices and what the needs are in this area.

4. We are also reviewing feedback from our earlier pilot programs.

We anticipate that this first phase of planning will be completed in October 1998. At that point, we will draft a concept paper, which begins to more clearly define the objectives, philosophy and programs for JEWEL.

During the next phase of our planning process, we will visit best practice sites that are identified by the commissioned papers and conduct a needs assessment in the field. Based on this new information, we will modify the concept paper and begin to address the practical issues of creating JEWEL as an institution.

FLAGSHIP PILOT PROGRAM

To test and implement the ideas that are emerging from the JEWEL planning process, we are developing a professional pilot program for senior leadership from a wide variety of settings (e.g., school leaders, senior agency professionals, camp directors). This pilot will be the springboard for implementing the principles developed and codified in the planning phases enumerated above.

The target audience for this program will be senior and highly experienced professionals from a wide variety of Jewish educational settings. The pilot will be an intensive two-year program, including a core curriculum and individual study and tutorial components to meet specific goals for each participant. One important component of this work will include mentoring participants and consulting with some of their institutions. The initial program will target leaders in the contexts of their institutions and will include several seminars that will involve professional leaders with their key lay leaders as well.

Our work on other JEWEL pilots is continuing to move forward. These pilots include:

- The Forum
- The pre-GA lay leadership pilot
- The conference on rabbinic education
- TEI – Cohort 3
- The professors group

We looking forward to further discussion about JEWEL at our forthcoming board meeting.