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Subseries 1: Meetings, 1990–1998.

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Planning meeting, November 1992.

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American Jewish Archives website.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

afed

MEMORANDUM

TO: Shulamith Elster
Seymour Fox
Ellen Goldring
Sol Greenfield
Annette Hochstein
Barry Holtz
Jim Meier
Art Naparstek
Jack Ukeles
Jon Woocher

DATE: November 2, 1992

FROM: Art Rotman

SUBJECT: CIJE Planning Meeting

This is to confirm our meeting for Thursday, November 19, 3:00-8:00 p.m. and Friday, November 20, 9:00 a.m.-12:00 p.m. The Planning Meetings will take place in the JCC Association Conference Room at 15 East 26th Street.

I look forward to seeing you then.

MEMORANDUM

file

To: Art Rotman

From: Jack Ukeles *Jack*

Date: November 3, 1992

Re: att'd

cc: Shulamith Elster
Sol Greenfield
Jim Meier

=====

I am enclosing a draft memo from you to the Execs on calendar and a draft memo from me to the Planning Directors about the Workshop on November 23 & 24 (to be enclosed with the first memo).

I assumed that you would only participate in the evening session and not participate in a formal way on the 24th since the Federation Execs will not be present; which is why I didn't list you for any sessions. This will leave you free to come in or not as your day develops. If you are planning to spend the day, you should be on the program. Please advise and I will adjust accordingly.

I also assumed that Sol would not play a role in leading any sessions. Please advise if that is correct.

We can use this draft as the basis for our discussion on Thursday, and I can fax it to the communities on Friday.

Draft-11/2/92
MEMORANDUM

To: Steve Gelfand
Marshall Levin
Howard Neistein

From: Jack Ukeles

Date: November 6, 1992

Re: Lead Communities Planning Workshop

=====

As you know, we are planning a workshop on November 23 and 24th to focus on the development of Lead Communities Plans. I am writing to share our thinking to date, and to elicit your suggestions for the agenda. If you have any minor comments, please just mark this up and fax it back. If you have major concerns, please give me a call.

The draft agenda includes an 9:00AM "sketch" of each community. We are suggesting that one person from each community take ten to fifteen minutes to touch on the highlights of the community's Lead Communities Proposal, and to share the basic facts about the community. We will circulate a summary of the basic data on the three communities in the packet mailed just before the meeting.

Title: LEAD COMMUNITIES PLANNING WORKSHOP

Purpose: To develop a common approach to Lead Communities Planning.

The emphasis is on "how to do it". To the extent possible, we want to identify potential roadblocks to successful planning and devise approaches to eliminating these.

Participants:

Lauren Azoulai	Atlanta
Steven Gelfand	
Chaim Botwinnick	Baltimore
Nancy Cutler	
Marshall Levin	
Howard Neistein	Milwaukee
Shulamith Elster	CIJE
Sol Greenfield	
Jim Meier	
Jack Ukeles	

ART ROTMAN ANNETTE
SEYMOUR

Location: JCC Association
14th Floor (conference room)
15 East 26 Street (between Madison Avenue and Fifth Avenue)
New York City

Logistics: CIJE will cover costs at the meeting (food and hotel); the community is expected to cover transportation costs. Joanne Schaeffer in our office is handling hotel arrangements. She will be booking a room for each out of town participant in the _____ Hotel on _____ Street. If anyone prefers to make their own arrangements, please let her know as soon as possible.

Program

Monday, November 23

6:00PM	Welcome Workshop Introduction	Art Rotman Jack Ukeles
6:30PM	Dinner	
7:30PM	Towards Systemic Change in Jewish Education The Genesis of the Lead Communities Concept	Seymour Fox Annette Hochstein
9:00PM	Open Discussion of the Lead Communities Project	Shulamith Elster

Tuesday, November 24

8:00AM	Coffee	
8:30AM	Review of Lead Communities Planning Calendar	Jack Ukeles
9:00AM	A sketch of each Lead Community as a context for improving Jewish education <ul style="list-style-type: none"> • Atlanta • Baltimore • Milwaukee 	<hr/> <hr/> <hr/>
10:30AM	A Portrait of a Lead Community [Plan]	Shulamith Elster
11:30PM	Planning Guide	Jim Meier
12:30	Lunch	
1:30PM	Connections <ul style="list-style-type: none"> • Introducing Best Practices • The Talent Bank • Continental Educational Resources • Continental Financial Resources 	Barry Holtz Jim Meier Shulamith Elster Shulamith Elster
3:00	Issues <ul style="list-style-type: none"> • Toward a common language: what do we mean by "improvement"; "system"; "settings" "populations" "and" "programs" • How should the CIJE staff interact with the Community staffs • When should we work as a foursome and when as a set of doubles? • Where in the process it makes sense to have a community-specific approach and where it makes sense to have a general North American Approach. • Agenda: Timing and content of Meeting in January with execs and lay leadership 	Jack Ukeles
4:30	Adjournment	

Draft - 11/3/92
M E M O R A N D U M

To: Friedman
Meyers
Sarnat
(separate memos)

From: Art Rotman

Date: November 6, 1992

Re: Lead Communities: next steps

=====

I envision the following next steps in the Lead Communities process:

- 1 The Letter of Understanding. By now, you have had a chance to review the draft. Unless I hear from you to the contrary, I am assuming that you foresee no major difficulties from your community's point of view. If you do foresee problems with the dates, I am available to come to _____ [Atlanta, Baltimore, Milwaukee] to help the process along. Please let me know as soon as possible if such a visit is needed.
- 2 The GA. By now invitations should have been received for the forum on Thursday and the breakfast on Friday.
- 3 Planners Workshop. We have scheduled a workshop in New York City on November 23d and 24th for your Lead Community planners. This will be a "nuts and bolts" discussion of the Lead Communities Planning process. A draft agenda is enclosed; additional material will go out before the meeting.
- 4 We envision an "event" in December in your community. We anticipate a format similar to the site visit last spring:
 - A pre-meeting with the lay President of Federation; the Exec; and the Chair of the Lead Communities Committee to discuss overall progress and deal with issues or concerns.
 - A meeting with top community lay leadership at which the Letter of Understanding would be signed, and the plans for the year will be discussed.
 - A meeting with pros to discuss both planning and educational issues.

You may also want to consider:

a community-wide event to which the Jewish educational "stakeholders" are invited

[for Baltimore letter only]

a small meeting with Charles Bronfman and the key local major donors and potential donors to Jewish education.

[for Atlanta letter only]

- 5 Sometime later this year -- the exact date will have to be built around calendars -- we envision a meeting involving a major CIJE leader (e.g. Mort Mandel) to meet with the most important current and potential local donors.

[for Milwaukee letter only]

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[for Milwaukee and Atlanta letter only]

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Peabody College

VANDERBILT UNIVERSITY



NASHVILLE, TENNESSEE 37203

TELEPHONE (615) 322-7311

Department of Educational Leadership • Box 514 • Direct phone 322-8000

MEMORANDUM

TO: Art Rotman
Shulamith Elster

FROM: Ellen Goldring

SUBJECT: November Meetings

DATE: November 3, 1992

As you begin to finalize the agenda for the November 19-20 meeting, I wanted you to know my schedule. Since I teach on Thursdays, I will not arrive in New York until 5:30 p.m. On November 20, I will leave on a 1 p.m. flight. If you could arrange for my contributions to the agenda to fall between those times, I would be grateful.

The field researchers will be attending the November 23-24 meeting. I will not.

If I can be of any help as you plan the agenda, please do not hesitate to contact me.

I called to
tell her to come!

S.

Meeting is 3-8 on the 19th
I think it would be good to
have Ellen - she can
do her piece Friday am -
we'll have to end early on
Friday anyway!

Post-It® brand fax transmittal memo 7671		# of pages • 1
To Art Rotman, Shulamith Co. Elster	From E. Goldring Co. Vanderbilt Univ.	
Dept. CIE	Phone # 322-8000	
Fax #	Fax #	

Exhibit 1

Draft - 11/3/92
MEMORANDUM

To: Friedman
Meyers
Sarnat
(separate memos)

From: Art Rotman

Date: November 6, 1992

Re: Lead Communities: next steps

Add for ③

①

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1 The Letter of Understanding. By now, you have had a chance to review the draft. Unless I hear from you to the contrary, I am assuming that you foresee no major difficulties from your community's point of view. If you do foresee problems with the dates, I am available to come to _____ [Atlanta, Baltimore, Milwaukee] to help the process along. Please let me know as soon as possible if such a visit is needed.

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You may also want to consider:

sent p. 3
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(2)

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[for Baltimore letter only]

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[for Milwaukee and Atlanta letter only]

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TELEFAX

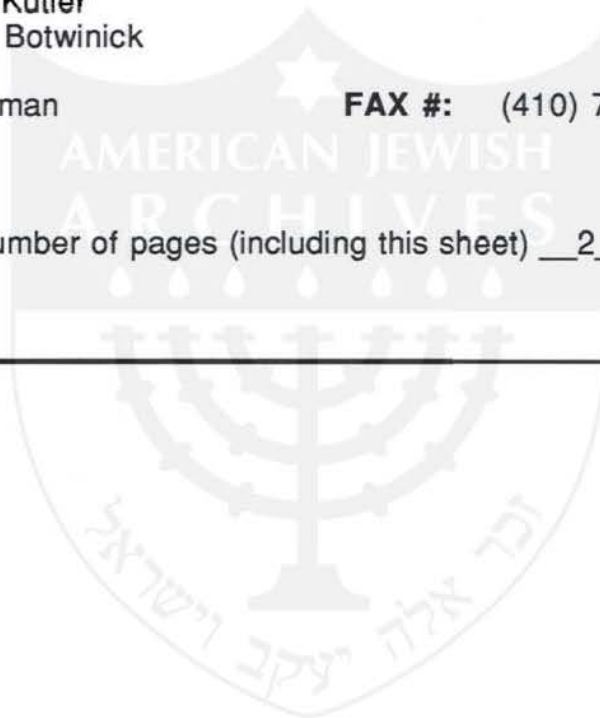
TO: Marshall Levin
Nancy Kutler
Chaim Botwinick

DATE: November 6, 1992

FROM: Art Rotman

FAX #: (410) 752-1177

Number of pages (including this sheet) 2



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New York, NY 10003
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TELEFAX

TO: Steve Gelfand
Lauren Azoulai

DATE: November 6, 1992

FROM: Art Rotman

FAX #: (404) 874-7043

Number of pages (including this sheet) 2

AMERICAN JEWISH
ARCHIVES



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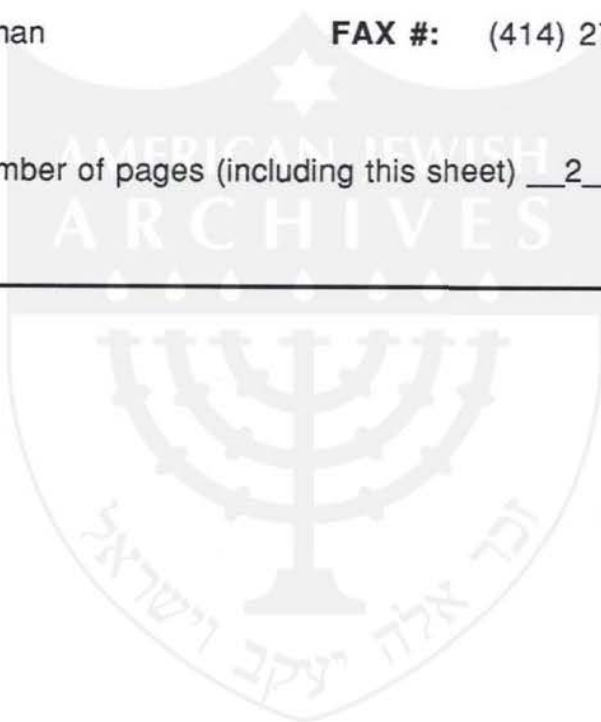
TO: Howard Neistein

DATE: November 6, 1992

FROM: Art Rotman

FAX #: (414) 271-7081

Number of pages (including this sheet) 2



PLEASE HOLD THESE DATES

MONDAY, NOVEMBER 23

AMERICAN AND JEWISH

TUESDAY, NOVEMBER 24

The Council for Initiatives in Jewish Education will host a dialogue in New York with Atlanta, Baltimore, and Milwaukee planners on immediate and long-range plans for the revitalization of Jewish education through its Lead Communities Project.

We will begin with dinner at 6:00 p.m. on Monday and continue till 4:30 p.m. on Tuesday. Please contact Jo Ann Schaffer at (212) 532-1961, if you would like her to make hotel arrangements for you.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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file

TELEFAX

To: Annette Hochstein

Date: November 6, 1992

From: Arthur Rotman

FAX #: 011 972 2 619 951

Number of pages (including this sheet) _____

MESSAGE:

1. In view of the fact that Seymour was not available Friday, we will not make any final decisions until the three of us have had a chance to speak together early next week.
2. In the meantime, we have, as you know, invited the planners of the three communities to a meeting on the evening of the 23rd and all day on the 24th. We agreed in our phone conversation that this meeting would proceed. I asked you to develop the program and approach for this meeting. It is entirely in your hands. You will also determine which of the staff you will want with you at those meetings.

We have also scheduled a meeting of the extended staff, including Naparstek, Holtz and Woocher, on November 19 from 3:00 p.m.-7:00 p.m. and Friday the 20th, 9:00 a.m.-12 noon.

We agreed that the documents that you will want to use with the planners should be the subject of the discussion at the meetings on the 19th and 20th. You undertook to develop these documents by either editing what we already have available and/or creating whatever new documents you may find necessary. These documents would, of course, have to be in the hands of our staff several days in advance of the meeting on the 19th which would then call for them being faxed by November 13 the latest.

It is all yours.

3. The Planning Guide to which reference is made in the papers I sent you yesterday is the one that was developed some time ago and I am enclosing a copy.

Looking forward to talking with you and Seymour.

Tel. 972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To: Art Rotman	Date: November 6, 1992
From: Annette Hochstein	No. Pages: 3
Fax Number: _____	

Dear Art,

Unrelated to our conversation of yesterday, I wanted to share two points with you.

1. The letter of understanding:

I have no comments about the body of the text. But I believe that in our conversation overlooking the Mediterranean sea, we mentioned that the appendix should be deleted. If I forgot to mention it then, here is the thought: the appendix is too brief to be useful as illustration, and some of the points invite misinterpretation (e.g. the fourth paragraph). Therefore I recommend that it be dropped.

2. Upcoming staff meeting

Thank you for the confirmation of the staff seminar of November 19 and 20. We here have conducted our own mini-seminar in preparation of that meeting and worked at trying to establish what a first year workplan for lead communities might entail, and flowing from that perhaps what some of the agenda of the staff meeting might include. Here is where we come out:

The first year of work with lead communities should include the following broad elements (I am not relating here to the process: setting up of local mechanism for implementation etc.);

- a. Introduce lead community idea into the community
- b. Prepare plans including:
 1. Educational self assessment
 2. Lead Community plan (5-year plan)
- c. Year 1 workplan - including:
 1. Introduce monitoring, evaluation, feedback project and set up feedback process
 2. Implementation of several projects in each of the key areas of endeavor (personnel, community)
 3. Launch vision/goals project with particular reference to Monitoring Evaluation and Feedback project.
 4. Learning best practices

Here is a very brief elaboration on each:

a. the concept of lead community, the broad idea and its details needs to be introduced thoughtfully to various populations in each lead community so that they know what to expect and what to do (educators, rabbis, lay people, professionals and planners in the community). One of our assignments at the staff meeting would be to discuss how this is going to happen. It would be wonderful if we could, at the end of the meeting, agree on what needs to happen with each of these population groups (e.g. we want to make sure that their needs are addressed, their concerns taken into consideration, their participation in the project specified, the mode of work defined, the benefits likely to accrue to them explained, etc...). We would also decide how to do this (individual meetings, meetings by groups in the lead communities, meetings of all groups at a joint seminar convened by the CIJE, etc.).

b. The second element of this year's workplan is the planning assignment. This includes:

1. The need for the community to study its own educational system, its strengths, weaknesses and needs. For that to happen, the staff must be in a position to offer guidelines and guidance, including on such items as how to conduct an assessment of the educators in the community, whether to introduce achievement tests or not, what sort of inventory of educational opportunities we need and to what level of detail, data on attendance, etc. Preparatory work includes the need to identify elements of such assessment studies that have been undertaken in the Jewish or the general education systems.

2. Preparation of a five-year plan. This would be the outcome of the work of the local mechanism, whatever its form (committee, commission, sub-groups, planner, etc.); together with the joint CIJE-Lead Community seminar. It would include all the elements of plan from the definition of needs and targets, through the implementation plan.

c. Year-1 workplan.

This element has already begun. Let me just illustrate item c.2. In order to keep the momentum, to build on expectations and respond to them, to begin to build the local educational capacity and in order to gain time we would recommend that the CIJE offer for immediate implementation several projects which we know will be required, and for which we need very little lead time. These projects would be in the areas of personnel training and community mobilization (e.g., summer in-service training seminar for lead teachers at each of the training institutions; seminar for program for all day school principals in the lead community; program for all supplementary school principals and all informal settings program directors; training program for all school board members; etc.). These suggestions (of which we would bring many more to the staff seminar) would represent areas of consensus and agreed upon needs.

* * * * *

If the staff seminar end with a better understanding of these items and the way to introduce them and bring them about in the lead communities, we will have advanced the project significantly. I would love to discuss this with you whenever convenient on the phone.

Best regards,


Annette

(3)

Draft-11/2/92 MEMORANDUM

To: Steve Gelfand
Marshall Levin
Howard Neistein

From: Jack Ukeles

Date: November 6, 1992

Re: Lead Communities Planning Workshop

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Insert to p ①

(4)

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MIKE Howard Neistein
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CISE Sol Greenfield
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CISE *Pls CISE staff*
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Mandel Institute

מכון מנדל

Tel. 972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To: Art Rotman	Date: November 8, 1992
From: Annette Hochstein	No. Pages: _____
Fax Number: _____	

Dear Art,

Following our conversation on Friday I did some planning for the staff meeting of November 19th and 20th and the lead communities meeting of November 23rd and 24th. Here are my thoughts:

The general framework of the meetings should remain as you have planned them, though if the meeting on the 19th could start earlier and/or end later, that could give us much needed time. With minor changes (to accommodate a changed agenda), I recommend that your memo to participants should also go as planned (see exhibits). The major change suggested is the agenda for each of the meetings. Could we discuss them when we speak on the phone? There are also some additions to the participants list which otherwise should not be altered.

I think both of us would be happy if we could conclude this round of meetings with the following outcomes:

1. That the participants understand the lead communities project and the tasks resulting from it (e.g., the idea of focussing simultaneously on several major areas such as personnel; the need to hire 2-3 educators for new positions).
2. That the staff agree on how to present and introduce the project to various actors and actor groups in the community (what do we want lay people, professionals, educators, rabbis to know about the project and how and when do we want to do this).

3. We want to sketch the first year workplan so that participants leave the meeting knowing what to do the next morning, and what needs to be done over the next 12 months.

4. We want to set joint work modes and dates for subsequent meetings.

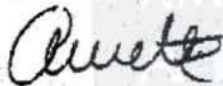
These outcomes require, of course, appropriate modifications for each of the two meetings. I attach suggested agendas.

As to the talent bank proposal: the ideas expressed in this document are interesting -- we should discuss them before taking a decision.

Seymour and I will be arriving in New York early on November 18th in order to allow for individual meetings before the two workshops. Would it be possible for the three of us to meet at any time during the 18th or 19th?

I hope this is helpful.

Best regards,



Annette



COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128

New York, NY 10003

Phone: (212) 532-1961

FAX: (212) 213-4078

TELEFAX

To: Annette Hochstein

Date: November 9, 1992

From: Arthur Rotman

FAX #: 011 972 2 619 951

Number of pages (including this sheet) 1

MESSAGE:

Some time ago we discussed the fact that you will have two of the Jerusalem Fellows join us for the meetings here in November. At the time, I asked for a one or two sentence bio on each. Would you please provide.

Thanks for your prompt revisions to the mailing to the Lead Communities, etc. Material as revised going out immediately.

The plan for November 23 and 24 now calls for six community representatives and to be "trained" by nine of us doesn't sound right. What do you suggest?

Lead Communities Planning Workshop

AGENDA

Monday, November 23rd, 1992

6:00 p.m.-10:00 p.m.

- I. Welcome Art Rotman, Director CIJE
- II. Workshop Introduction Shulamith Elster, Chief Education Officer
- III. A Sketch of Each Lead Community as a Context for Improving Jewish Education
 - Atlanta _____
 - Baltimore _____
 - Milwaukee _____
- IV. Lead Communities
 - A Concept and Its Implementation Seymour Fox
Annette Hochstein
- V. Discussion

Tuesday, November 24th, 1992

8:00 a.m.-4:30 p.m.

COFFEE

- I. Lead Communities at Work: Presentation & Discussion Shulamith Elster & staff Members
 - A. Building the Profession
 - Mobilizing Community Support
 - Working with the Major Settings (day schools, JCCs, supplementary schools, early childhood programs, the Israel Experience, etc.)
 - B. Support Projects:
 - 1. Best Practices
 - 2. Setting Goals, the Vision Project
 - 3. Monitoring, Evaluation & Feedback

C. Organizing for Change

1. Structure
2. Process

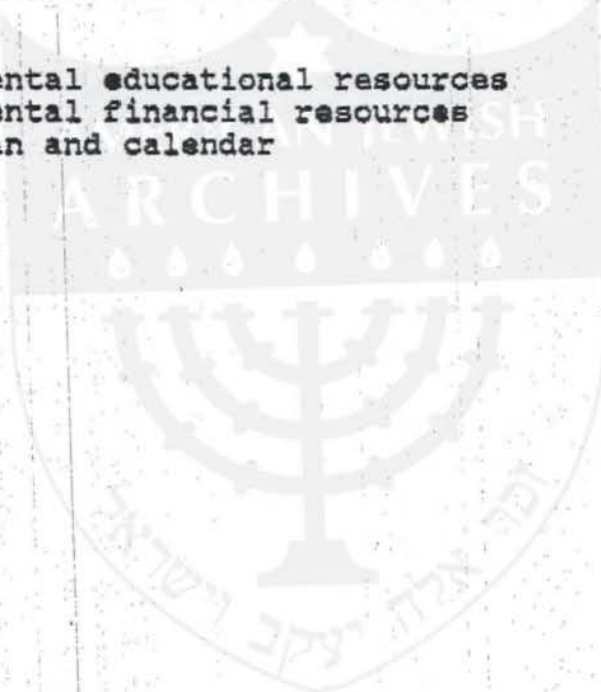
II. Lunch**III. Work Plan -- Year 1**

Jack Ukeles
& staff members

- a. Introducing the Project into the Community
- b. Assessing the Educational System
- c. Preparing the 5-Year Plan
- d. Projects for Immediate Implementation
- e. Planning guide

IV. Working Together: CIJE, Lead Communities Shulamith Elster

- Agenda
- Continental educational resources
- Continental financial resources
- Workplan and calendar



Draft for discussion
CIJE STAFF MEETING**Suggested Agenda****Thursday November 19th and Friday November 20th, 1992****I. Introducing the Lead Community Idea Into the Community**

- a. Desired outcomes
 - 1. Lay leaders
 - 2. Professionals and planners
 - 3. Educators and rabbis
- b. Method and setting (individual meetings, seminars, workshops)
- c. Timetable

II. Year 1 Work Plan: Including

- a. Best practices project (discuss, choose, strategy for adapting)
- b. Introduce the monitoring, evaluation, feedback project and set up feedback process
- c. Implementation of pilot projects in each key area of endeavor (personnel and community)
- d. Launch the vision/goal projects with reference to monitoring, evaluation and feedback project

III. The Planning Assignment for Lead Communities

- a. Educational self-assessment
- b. The 5-year plan

IV. Lead Communities Planning Workshop

- a. Suggested outcomes and format
- b. Participants
- c. Program
- d. Timetable

V. Other CIJE Assignments:

- a. Working with purveyors of educational services (e.g., training institutions, JCCA, JESNA, CLAL, CAJE, etc.)
- b. Working with foundations
- c. Fundraising

VI. Next Steps

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

TELEFAX

TO: Seymour Fox
Annette Hochstein

DATE: November 11, 1992

FROM: Art Rotman

FAX #: 619 452

Number of pages (including this sheet) 2

MESSAGE:

At your request we have extended the conference times on the 19th/20th and 23rd/24th. In addition, we have allowed for a session on Thursday at 11:00 a.m. with a limited group. I have also set up a postmortem with the same group.

We have far too many people on the 23rd and 24th. I am suggesting that the "observers" not be seated at the discussion table so that the people who need to be there can be in closer contact with one another.

Thanks for your suggested agenda for the 19th and 20th. I have made some revisions and you will be getting a revised copy within the next day or two.

Using the "Lead Communities at Work" I have begun the process of developing an interpretive document on the work of the CIJE for us all to discuss. I am not sure it will be ready for discussion on the 19th, but if it is, I will send you a copy in advance.

The agenda for the meeting on the 23rd and 24th will be hammered out in the meetings of the 19th and 20th.

Warm regards,

Art

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

TELEFAX

TO: Annette Hochstein **DATE:** November 12, 1992

FROM: Art Rotman **FAX #:** 619 452

Number of pages (including this sheet) 1

MESSAGE:

As you requested, Shmuel Wygoda will be included in the Staff Meetings on November 19/20. However regarding the Planners Meeting on the 23/24, I am really anxious to reduce the number at the table, so for the moment let's say Shmuel will be an observer. We can talk about this again later.

It looks like our next staff meeting will probably be on Tuesday, December 1, from 9:00-11:00 a.m.

You can call me on November 17. I will be free from 10:00 a.m. to 12:30 p.m. and from 2:30 p.m. on.

I will be out of the office Thursday and Friday attending the GA. The agenda has not been finalized but you will receive it as quickly as possible.

Warm regards,

Art

Tel. 972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To: Art Rotman Date: 11/12/97
From: Annette Hochstein No. Pages: 1
Fax Number: _____

AMERICAN JEWISH
ARCHIVES

Dear Art,

Thanks for your fax with the meetings schedules.

We here are keen to see your agenda, and to know that it is in synch with the preparations our team is doing. As regards participation in the meeting of 23/24 - I agree with your suggestion, but would like Shmuel Wygoda -- who is our key person for several content elements (day schools; syllabus; the Orthodox) to sit at the main discussion table. He was also omitted from the participants' list for November 19/20 and will of course be there.

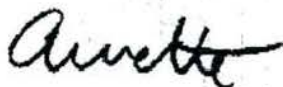
I was pleased to receive copy of the letter from Milwaukee -- when we meet we will need to discuss how one can be a Lead Community when the critical funding element is missing!

We would like to schedule a call with you before leaving the country, in order to wrap-up jointly the preparations of our many meetings. Could you please suggest times.

Do you already know when we would have a second staff meeting (30/11; 1/12; 2/12?).

Best Regards,

Annette



COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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163 Third Avenue #128, New York, NY 10003
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Honorary Chair
Max M. Fisher

Chair
Morton L. Mandel

Vice Chairs
Charles H. Goodman
Neil Greenbaum
Matthew J. Maryles
Lester Pollack

Executive Director
Arthur Rotman

Chief Education Officer
Dr. Shulamith R. Elster

November 11, 1992

Mr. Gary Gatza
New York County Medical Society
15 East 26th Street
New York, NY 10010

Dear Gary:

We would like to request the use of the Medical Society's conference room for a meeting we have scheduled for Thursday, November 19, at 12:30 p.m. The meeting will probably break between 3:00-3:30 p.m and resume in the JCC Association Conference Room. There will be 11 participants.

I understand that you will let me know later this week what the fee will be for use of the conference room.

CIJE is headed by Art Rotman, who is also the Executive Vice President of the Jewish Community Centers Association. They are two distinct organizations...it's a long story, but that is the reason for the different mailing address printed above.

We very much appreciate your making this space available to us.

Jo Ann Schaffer

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Executive Director
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Chief Education Officer
Dr. Shulamith R. Elster

November 11, 1992

Ms. Blanche Rothman
UJA/Federation
130 East 59th Street
New York, NY 10022

Dear Blanche:

The Council for Initiatives in Jewish Education would like to utilize the Liff Room for a dinner meeting to be held on Monday, November 23, 1992, from 6:00-9:00 p.m. We expect an attendance of 19 people. Dinner should be kosher and we would like to have roast chicken.

I need to discuss the details of the evening with our Executive Director, Art Rotman, and will be in touch with you as soon as I have more information.

Your help is greatly appreciated.

Sincerely,



Jo Ann Schaffer

*Carl Liff Room
2nd floor
one long board table*

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

TO: S. Elster
S. Fox
E. Goldring
S. Greenfield
A. Hochstein
B. Holtz
D. Marom
J. Meier
A. Naparstek
J. Ukeles
J. Woocher
S. Wygoda
Henry Zucker

DATE: November 12, 1992

FROM: Jo Ann Schaffer

SUBJECT: November 19/20

This is to confirm a meeting on November 19 from 12:30-6:30 p.m. to take place at 15 East 26th Street, 11th floor (NY County Medical Society's Conference Room, Suite 1101). A dairy lunch is planned.

The meeting will continue the following day and will be held in the JCC Association's Conference Room on the 14th floor, 8:30 a.m.-12:00 p.m. A light breakfast will be available at tthe start of the meeting.

P.S. A room has been reserved for you at the Roosevelt Hotel, 45th Street and Madison Avenue. Confirmation #N1119WG.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

TO:

✓ S. Elster *
✓ S. Fox *
E. Goldring
S. Greenfield
✓ A. Hochstein *
B. Holtz
D. Marom
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* This group will meet with Art Rotman from 11:00 a.m.-12:30 p.m. in the JCC Association's Mazer Study.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

DATE: November 12, 1992

TO: Lauren Azoulai
Chaim Botwinick
Shulamith Elster *
Seymour Fox *
Steve Gelfand
Roberta Goodman
Annette Hochstein *
Barry Holtz
Nancy Kutler

Marshal Levin
Daniel Marom
Jim Meier
Howard Neistein
Claire Rottenberg
Julie Tammivaara
Jack Ukeles *
Jon Woocher
Shmuel Wygoda

FROM: Jo Ann Schaffer

SUBJECT: November 23rd/24th

This is to confirm a dinner meeting on Monday, November 23, from 6:00-9:00 p.m. to take place at UJA/Federation, 150 East 59th Street, the Carl Leff Room on the Second Floor.

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MEMORANDUM

DATE: November 12, 1992

TO: Lauren Azoulai
Chaim Botwinick
✓ Shulamith Elster *
✓ Seymour Fox *
Steve Gelfand
Roberta Goodman
✓ Annette Hochstein *
Barry Holtz
Nancy Kutler

Marshal Levin
Daniel Marom
Jim Meier
Howard Neistein
Claire Rottenberg
Julie Tammivaara
✓ Jack Ukeles *
Jon Woocher
Shmuel Wygoda

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MEMORANDUM

DATE: November 12, 1992

TO: Lauren Azoulay
Chaim Botwinick
—Shulamith Elster
—Seymour Fox
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Roberta Goodman
—Annette Hochstein
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11/19, 20

October 26, 1992

To: Jo Ann Schaffer

From: Arthur Rotman

When we send out the notices for the Staff meetings in November, I would like you to remind me re the possible inclusion of Steve Hoffman and or Hank Zuckor.

Call at
GA

send notice for 11/19 meeting

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

TO: Diane Rogoff

DATE: November 12, 1992

FROM: Jo Ann Schaffer

SUBJECT: Meetings Arrangements

I will need your help in arranging lunch/refreshments for three meetings being held within the next two weeks.

Thursday, November 19

This meeting will begin at 12:30 p.m. with lunch for 14 people. HOWEVER, the meeting is being held in the conference room of the NY County Medical Society on the 11th floor. You and I will need to go down there to check out the facilities. They have given us permission to bring in food but I don't know what kind of set up they have.

The meeting should break at either 3:00 p.m. or 4:30 p.m. and move to the JCCA Conference Room. We will need coffee, tea, soft drinks, fruit, etc. set up when they get there. (Note: Sol Greenfield is have a Regional Directors meeting in the Conference Room that day which is scheduled to end at 2:30 p.m.) We will probably have to clean up the mess on the 11th floor right away because they close at 5:00 p.m. I'll help as much as I can. The meeting will conclude at 6:30 p.m.

Friday, November 20

We will begin at 8:30 a.m. in the JCCA Conference Room with breakfast for 14 people: coffee, decaf, tea, juice, mini-muffins, bagels and the fixings.

Art expects to finish at 12:00 p.m. Should we have fresh coffee at 11:00 a.m.?

Tuesday, November 23

We need to set up the Conference Room for 18 people. (Neither Art nor I will be attending; I'm not sure who will be in charge.) The tables should be set in a square with the bottom end separated from the three-table configuration. (There are five people who are designated as "observers" and who should be segregated in some way from the main group.)

- They will start with the usual breakfast;
- coffee break at 11:00 (?);
- lunch at 12:00-12:30 p.m. Let's order dairy. The lunch with the salmon mousse and white fish seemed to be a hit last time.
- coffee break at 3:00 p.m with cheese and fruit

They are scheduled to end at 4:00 p.m.



Separate does not need hotel

HOTEL ACCOMMODATIONS

HOTEL

CONFIRMATION

THURSDAY, NOVEMBER 19

E. Goldring	Roosevelt Hotel 45th & Madison	N1119WG
-------------	-----------------------------------	---------

MONDAY, NOVEMBER 23

H. Neistein	Dumont Plaza 150 East 34th Street 481-7600	53825
R. Goodman	Dumont Plaza	53827
J. Tammivaara	Dumont Plaza	54014
C. Rottenberg	Dumont Plaza	54015
L. Azoulai	Roosevelt Hotel 45th & Madison 661-9600	E1123AA
S. Gelfand	Roosevelt Hotel	A1123GG
C. Botwinick	Roosevelt Hotel	A1123GB
N. Kutler	Roosevelt Hotel	A1123GK
M. Levin	Roosevelt Hotel	A1123GL

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
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New York, NY 10003
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MEMORANDUM

TO: Ellen Goldring

DATE: November 11, 1992

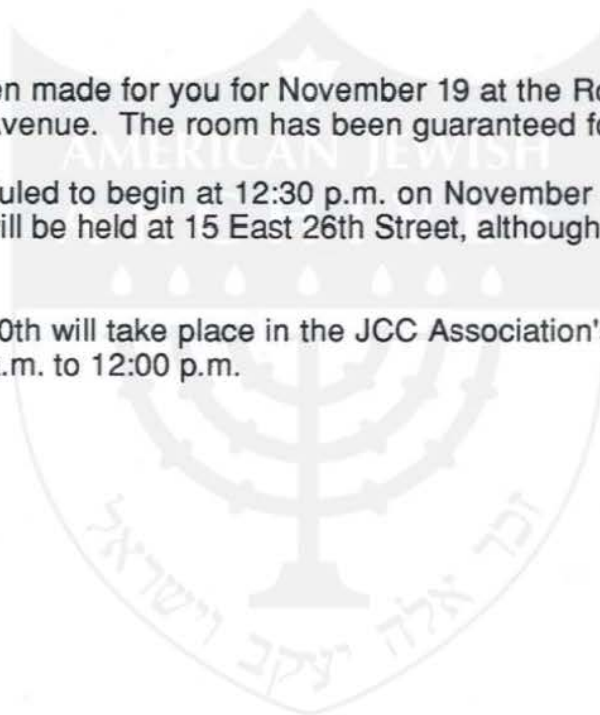
FROM: Jo Ann Schaffer

SUBJECT: Meeting Times/Hotel

A reservation has been made for you for November 19 at the Roosevelt Hotel at 45th Street and Madison Avenue. The room has been guaranteed for late arrival.

The meeting is scheduled to begin at 12:30 p.m. on November 19 and should end around 7:00 p.m. It will be held at 15 East 26th Street, although the exact site is yet to be determined.

The meeting on the 20th will take place in the JCC Association's Conference Room, 14th floor, from 9:00 a.m. to 12:00 p.m.



COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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MEMORANDUM

DATE: November 12, 1992

TO: Lauren Azoulai
Chaim Botwinick
Shulamith Elster
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Shmuel Wygoda

FROM: Jo Ann Schaffer

SUBJECT: November 23rd/24th

This is to confirm a dinner meeting on Monday, November 23, from 6:00-9:00 p.m. to take place at UJA/Federation, 150 East 59th Street, the Carl Leff Room on the Second Floor.

The meeting will continue the following day in the JCC Association's Conference Room on the 14th floor from 8:30 a.m.-4:00 p.m. A light breakfast will be available at the start of the meeting and we will also provide a dairy lunch.

Lauren, a room has been reserved for you at the Roosevelt Hotel, 45th Street and Madison Avenue, Confirmation #E1123AA. The Hotel's phone number is (212) 661-9600. As our organization has neither a travel agent nor an account with the hotel, we would appreciate your charging the room to your credit card and submitting the bill to us for reimbursement.

Post-It™ brand fax transmittal memo 7671		# of pages ▶ 1
To L. Azoulai	From Jo. Schaffer	
Co.	Co.	
Dept.	Phone #	
Fax # (404) 874-7043	Fax #	

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MEMORANDUM

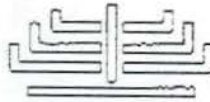
TO: Art Rotman
FROM: Shulamith Elster

DATE: November 13, 1992
SUBJECT: Agenda for 11/19-20

Barry Holtz is scheduled to speak sometime during the 3:15-4:45 p.m. slot on Nov. 19, however, he cannot be there until about 6:00 p.m. I suggest trying to work him in on the second day. Actually there is a lot to cover under "B" so you may want to just limit that time segment to Goals and Pilot Projects.

Also, participants need to know what is expected of them: Will you be calling each with specific assignments?

I'll be in Milwaukee on Monday and Detroit for the JCCA on Tuesday.



to NM 12/17/92

Atlanta Jewish Federation

1753 Peachtree Road, Northeast/Atlanta, Georgia 30309/404-873-1661/FAX 404-874-7043

November 25, 1992

Dr. Shulamith Elster
CIJE
163 Third Avenue #128
N.Y., NY 10003

Dear Shulamith:

Good seeing you at the lead communities meeting. While we have a long way to go, we made good progress. All of us in Atlanta are looking forward to receiving the material we discussed within the next few weeks so the local planning process can begin.

Lauren and I incurred the following expenses:

Eastgate Tower, two rooms	\$310
taxis (no receipts)	37
parking	12
Total	\$359

Please make the check payable to me. Thanks.

Sincerely,

Steven E. Gelfand
Associate Executive Director

PRESIDENT—Gerald D. Horowitz • FIRST VICE PRESIDENT—David N. Minkin
VICE PRESIDENTS—Jack N. Halpern, S. Stephen Selig III
TREASURER—Mark Lichtenstein • ASSISTANT TREASURERS—Elliott Cohen, Jody Franco
SECRETARY—Larry Joseph • ASSISTANT SECRETARIES—Candy A. Berman, Ann L. Davis
CAMPAIGN CHAIRMAN—Arnold B. Rubenstein, M.D. • EXECUTIVE DIRECTOR—David I. Sarnat



UJA-FEDERATION OF NEW YORK

130 East 59 Street, New York, N.Y. 10022 (212) 980-1000

CONFERENCE AND BANQUET CENTER

INVOICE

Council for Initiatives
In Jewish Education
163 Third Avenue #128
New York, NY 10003
Attn: Ms. Jo Ann Schaffer

Date: 12/31/92
Invoice #: 1012

Date of Function: 11/23/92
Function No.:
Description: Dinner Meeting

FOR USE OF FACILITIES AT 130 EAST 59TH STREET

___ Meeting Room	___ hours	@\$ ___	per hour	\$ NO CHARGE
___ Ballroom (part)	___ hours	@\$ ___	per hour	
___ Ballroom (all)	___ hours	@\$ ___	per hour	
___ Prefunction Area	___ hours	@\$ ___	per hour	

Reception ___	No. of persons ___	@\$ ___	per person	\$ 247.00
Dinner <u>X</u>	No. of persons <u>19</u>	@\$ <u>13.00</u>	per person	
Breakfast ___	No. of persons ___	@\$ ___	per person	
Lunch ___	No. of persons ___	@\$ ___	per person	
Snacks ___	No. of persons ___	@\$ ___	per person	
Other ___	No. of persons ___	@\$ ___	per person	

Total \$ 247.00

Please attach copy of invoice to your remittance and mail to attention of Accounting Department.

OK
Adler
076

file

MEMORANDUM

To: Art Rotman

From: Jack Ukeles

Date: 11/16/92

Re: Att'd draft memo to participants in the planning workshop

=====

I went through Annette's draft and mine, and isolated the common topics. I will be out of town tomorrow, but my office can fax this if it is o.k. Please advise my office.



M E M O R A N D U M

To: Steve Gelfand
Marshall Levin
Howard Neistein

From: Jack Ukeles

Date: November 17, 1992

Re: Lead Communities Planning Workshop

=====

I am enclosing a brief description of the Workshop scheduled for November 23 and 24th. I am writing to share our thinking about topics to date, and to elicit your suggestions for the agenda. If you have any minor comments, please just mark this up and fax it back. If you have major comments, please give me a call.

We would like to include a brief "sketch" of each community. We are suggesting that one person from each community take ten to fifteen minutes to touch on the highlights of the community's Lead Communities Proposal, and to share the basic facts about the community.

You might want to re-read A Time to Act and the "Rationale" piece of the Lead Communities Guidelines in preparation for the meeting. We will also send you a packet of airplane/train reading material right before the meeting.

Suggested Topics:

Lead Communities: A concept and its implementation
Introducing the Project into the community
Best Practices
Continental educational resources
Continental Financial resources
A sketch of each of the three Lead Communities as a context for improving Jewish education
The Year One Work Plan
Planning Guide
Monitoring, Evaluation and Feedback

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

TO: Shulamith Elster

DATE: November 17, 1992

FROM: Art Rotman

SUBJECT: Revised Agenda for 11/19-20

Attached is a revised Agenda for our meetings on November 19 and 20. You are scheduled to lead the meeting for the following items at the approximate times indicated:

Thursday, November 19

12:30 p.m.

The First Year

- Desired Outcomes
(with A. Hochstein)

4:30 p.m.

Community Mobilization and Work Process
(with S. Fox, J. Ukeles)

Friday, November 20

8:30 a.m.

Lead Communities Planning Workshop
(with J. Ukeles, A. Hochstein)

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

TO: Seymour Fox

DATE: November 17, 1992

FROM: Art Rotman

SUBJECT: Revised Agenda for 11/19-20

Attached is a revised Agenda for our meetings on November 19 and 20. You are scheduled to lead the meeting for the following items at the approximate times indicated:

Thursday, November 19

4:30 p.m.

Community Mobilization and Work Process
(with J. Ukeles, S. Elster)

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

TO: Ellen Goldring

DATE: November 17, 1992

FROM: Art Rotman

SUBJECT: Revised Agenda for 11/19-20

Attached is a revised Agenda for our meetings on November 19 and 20. You are scheduled to lead the meeting for the following items at the approximate times indicated:

Friday, November 20

10:15 a.m.

Monitoring, Evaluation, and Feedback



COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

TO: Annette Hochstein

DATE: November 17, 1992

FROM: Art Rotman

SUBJECT: Revised Agenda for 11/19-20

Attached is a revised Agenda for our meetings on November 19 and 20. You are scheduled to lead the meeting for the following items at the approximate times indicated:

Thursday, November 19

12:30 p.m.

The First Year

- Overview and Work Plan
- Expectations of CIJE
- Planning with Lead Communities
(with J. Ukeles)

Friday, November 20

8:30 a.m.

Lead Communities Planning Workshop
(with J. Ukeles, S. Fox)

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

TO: Barry Holtz

DATE: November 17, 199~~2~~

FROM: Art Rotman

SUBJECT: Revised Agenda for 11/19-20

Attached is a revised Agenda for our meetings on November 19 and 20. You are scheduled to lead the meeting for the following items at the approximate times indicated:

Thursday, November 19

3:45 p.m.

Best Practices



COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

TO: Art Naparstek

DATE: November 17, 1992

FROM: Art Rotman

SUBJECT: Revised Agenda for 11/19-20

Attached is a revised Agenda for our meetings on November 19 and 20. You are scheduled to lead the meeting for the following items at the approximate times indicated:

Thursday, November 19

5:45 p.m.

Governance and Finances
(with A. Rotman)



COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

TO: Jack Ukeles

DATE: November 17, 1992

FROM: Art Rotman

SUBJECT: Revised Agenda for 11/19-20

Attached is a revised Agenda for our meetings on November 19 and 20. You are scheduled to lead the meeting for the following items at the approximate times indicated:

Thursday, November 19

12:30 p.m.

The First Year

- Planning with Lead Communities
(with A. Hochstein)

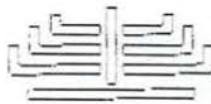
4:30 p.m.

Community Mobilization and Work Process
(with S. Fox, S. Elster)

Friday, November 20

8:30 a.m.

Lead Communities Planning Workshop
(with S. Elster, S. Fox)



cc: J. UKELES

Atlanta Jewish Federation

1753 Peachtree Road, Northeast/Atlanta, Georgia 30309/404-873-1661/FAX 404-874-7043

MEMORANDUM

TO: Art Rotman
FROM: Steve Gelfand
DATE: November 18, 1992

Sorry that we didn't have a chance to meet at the GA to discuss the letter of understanding. Hopefully we will be able to spend some time discussing it on Monday night or Tuesday.

Marshall Levin, Howard Neistein, and I talked during the GA about Jewish education planning in our communities, CIJE, and agenda items which we would find useful at the meeting next week. I'm not certain what your plans are, but we would like you to consider the following:

1. Roles and lines of communication - Each organization in the system--CIJE, Ukeles Associates, Federations--and individuals associated with these organizations have different responsibilities within the lead communities project. What are they? Who talks to whom about what?
2. Resource development - CIJE has significant financial expectations of the communities. What process will CIJE use to help us access external resources? How can this be incorporated into the letters of understanding?
3. Consultants - Each community has a "line of credit" for consultation. What are the specifics?
4. Year 1 planning - We would like to develop mutual goals and objectives for the first year, and to agree on a process to achieve them.

Looking forward to seeing you in a few days.

PRESIDENT—Gerald D. Horowitz • FIRST VICE PRESIDENT—David N. Minkin
VICE PRESIDENTS—Jack N. Halpern, S. Stephen Selig III
TREASURER—Mark Lichtenstein • ASSISTANT TREASURERS—Elliott Cohen, Jody Franco
SECRETARY—Larry Joseph • ASSISTANT SECRETARIES—Candy A. Berman, Ann L. Davis
CAMPAIGN CHAIRMAN—Arnold B. Rubenstein, M.D. • EXECUTIVE DIRECTOR—David I. Sarnat



UKELES ASSOCIATES INC.
THE CABLE BUILDING
611 BROADWAY
NEW YORK, NY 10012
Tel: (212) 260-8758
Fax: (212) 260-8760

November 20, 1992

Steven Gelfand
Associate Director
Atlanta Jewish Federation
1753 Peachtree Road, NE
Atlanta, GA 30309

Dear Steve,

At the workshop scheduled for November 23rd & 24th, we plan to cover the following topics:

1. A sketch of each of the 3 lead communities as a context for improving Jewish education
2. Lead Communities: a concept & its implementation
3. Introducing the project into the community
4. Best practices & consultation
5. Monitoring, evaluation & feedback
6. The year I workplan
7. Planning
8. Contributions of continental foundations, organizations, & providers of programs

For the community sketches, we suggest that one person from each community take 10-15 minutes to touch on the highlights of your lead community proposal, to describe steps to date to get organized, and to share some basic facts about the community. I am enclosing a composite of the information that was collected during the proposal review process.

You might find it helpful to re-read **A Time to Act** & the "Rationale" of the **Lead Community Guidelines** in preparation for the meeting.

I hope that we will find a few minutes to chat individually about the letter of understanding. We do not envision any group discussion of the letter itself.

We look forward to a productive engagement.

Very truly yours,

A handwritten signature in dark ink, appearing to read 'Jacob Ukeles', written over a horizontal line.

Jacob B. Ukeles
President



UKELES ASSOCIATES INC
THE CABLE BUILDING
611 BROADWAY
NEW YORK, NY 10012
Tel: (212) 260-8758
Fax: (212) 260-8760

November 20, 1992

Howard Neistein
Community Planning Director
Milwaukee Jewish Federation
1360 North Prospect Avenue
Milwaukee, WI 53202

Dear Howard,

At the workshop scheduled for November 23rd & 24th, we plan to cover the following topics:

1. A sketch of each of the 3 lead communities as a context for improving Jewish education
2. Lead Communities: a concept & its implementation
3. Introducing the project into the community
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We look forward to a productive engagement.

Very truly yours,

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Jacob B. Ukeles
President



UKELES ASSOCIATES INC
THE CABLE BUILDING
611 BROADWAY
NEW YORK, NY 10012
Tel: (212) 260-8758
Fax: (212) 260-8760

November 20, 1992

Marshall Levin

Director of Community Planning & Budgeting

The Associated: Jewish Community Federation of Baltimore

101 West Mount Royal Avenue

Baltimore, MD 21201-5781

Dear Marshall,

At the workshop scheduled for November 23rd & 24th, we plan to cover the following topics:

1. A sketch of each of the 3 lead communities as a context for improving Jewish education
2. Lead Communities: a concept & its implementation
3. Introducing the project into the community
4. Best practices & consultation
5. Monitoring, evaluation & feedback
6. The year I workplan
7. Planning
8. Contributions of continental foundations, organizations, & providers of programs

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Jacob B. Ukeles
President

MEETING MATERIALS

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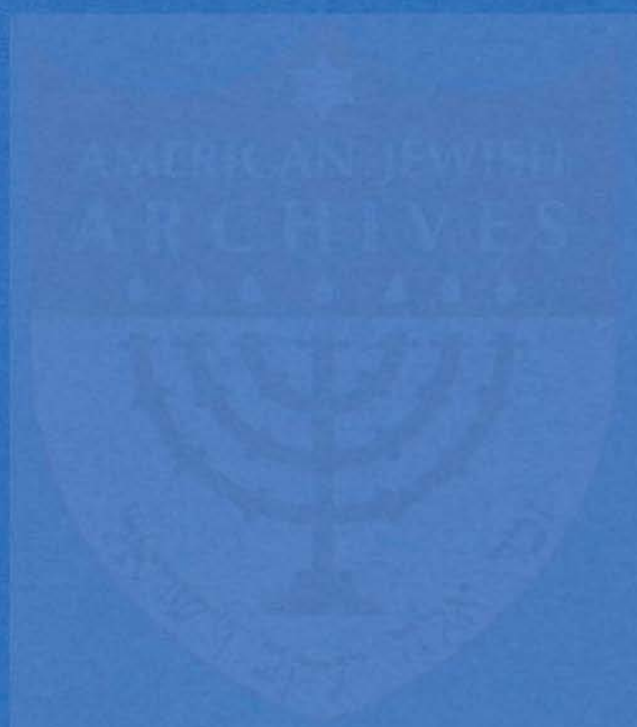
MEETING MATERIALS

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MEETING MATERIALS



PROPOSED FEEDBACK MECHANISM IN LEAD COMMUNITIES

The field researchers are expected to prepare quarterly reports on their findings in Lead Communities. During the first year, the reports will document the state of Jewish education in the three communities, with particular reference to visions for change, mobilization of the communities, and the professional lives of educators. (These reports will presumably be complemented by local self-studies addressing participation rates and other quantitative indicators.) Especially in the first quarterly report, the field researchers will document the process of becoming a Lead Community, and they will monitor the process throughout the year. Each community's report will reflect the particular pace and direction of planning within that community.

Preparation and Dissemination

The field researchers, with input from the director and associate director of evaluation and their advisory committee, will produce the first set of reports on the Lead Communities by the end of January 1993.

The January reports will be delivered to Art Rotman, the Executive Director of CIJE. He will send each community's report to its respective project director. In a cover letter, he will offer to have our field researchers provide one or more oral presentations to professional and/or lay leaders (at the discretion of the local project director) based on the portions of the report that are appropriate for wider dissemination. Each community will receive only its own report.

In addition, the evaluation staff (director, associate director, and field researchers) will prepare a summary report which will include comparative information about the three communities and an assessment of CIJE's progress to date. This report will be delivered to Art Rotman, who may wish to share it with the CIJE Board subcommittee on evaluation. }

Subsequent quarterly reports will be disseminated in the same manner, subject to modification based on our experience in January.

Content of the First Report

The first report must document the process of becoming a Lead Community. It must reveal the critical issues facing the Lead Communities as they attempt to mobilize and invigorate their systems of Jewish education. Examples of possible issues are:

- mobilization and cooperation among various groups within lead communities, e.g., federation professional and lay leaders
- achieving consensus within communities about what it means to be a "Lead Community"
- bringing educators into the Lead Community process
- getting community members to express visions for Jewish education.



CENTRE for EDUCATIONAL SOCIOLOGY
Department of Sociology

The University of Edinburgh
7 Buccleuch Place
Edinburgh EH8 9LW
Scotland

Fax UK (0)31 668 3263

Email CES@uk.ac.edinburgh

Telephone UK (0)31 650 1000

or direct dial UK (0)31 650 4186/4187

November 6, 1992

To: Art Rotman

From: Adam Gamoran and Ellen Goldring

CC: Evaluation project advisory committee

Re: Proposed feedback mechanism for CIJE and lead communities

The purpose of this memo is to propose a system for distributing and disseminating the quarterly reports prepared by our field researchers. We offer it now for your approval, with the suggestion that you present it for discussion to members of the lead communities, so they can have some input regarding the form and content of the quarterly reports.

The memo describes the distribution of quarterly reports, with each community receiving its own report. In addition, we mention a summary report. The summary report is intended for the CIJE administration (and, at your discretion, for the board subcommittee on evaluation). It will contain comparative information about the three communities, as well as an overall assessment of the CIJE's progress.

The field researchers are expected to prepare quarterly reports on their findings in lead communities. During the first year, the reports will document the state of Jewish education in the three communities, with particular reference to visions for change, mobilization of the communities, and the professional lives of educators. (These reports will presumably be complemented by local self-studies addressing participation rates and other quantitative indicators.) Especially in the first quarterly report, the field researchers will document the process of becoming a lead community, and they will monitor this process throughout the year. Each community's report will reflect the particular pace and direction of planning within that community.

Preparation and dissemination

The field researchers, with input from the director and associate director of evaluation and their advisory committee, will produce a first set of reports on the lead communities by the end of January.

The January reports will be delivered to Art Rotman, the Director of the CIJE. He will send each community's report to the respective local project directors. In a cover letter, he will offer to have our field researchers provide one or more oral presentations to professional and/or lay leaders (at the discretion of the local project director) based on the portions of the report that are appropriate for wider dissemination. Each community will receive only its own report.

In addition, the evaluation staff (director, associate director, and field researchers) will prepare a summary report. The summary report will include comparative information about the three communities, and an assessment of CIJE progress to date. This report will be delivered to Art Rotman, who may wish to share it with the CIJE Board subcommittee on evaluation.

Subsequent quarterly reports will be disseminated in the same manner, subject to modification based on our experience in January.

Content of the first report

The first report must document the process of becoming a lead community. It must reveal the critical issues facing the lead communities as they attempt to mobilize and invigorate their systems of Jewish education. Examples of possible issues are:

- mobilization and cooperation among various groups within lead communities, e.g. federation professional and lay leaders
- achieving consensus within communities about what it means to be a "lead community"
- bringing educators into the lead community process
- getting community members to express visions for Jewish education

NAME	1992	
	Nov	

[illegible]

LEAD COMMUNITIES—A PARTIAL SCENARIO

4-6 PILOT PROJECTS

PERSONNEL—IN SERVICE

Principals & JCC Execs

2 Teachers & Informal Eds from each Institution

1 New Hire

Israel Summer Seminar

Networking the 3 Communities

COMMUNITY MOBILIZATION

National Leaders Mobilize Local Leaders

Leadership Training

Program for all Boards

Denominational Leadership Training

Public Sessions on Vision & Best Practices

[illegible]

LEAD COMMUNITIES—A PARTIAL SCENARIO

												1992												1993												1994		
												Nov	D	J	F	M	A	M	J	J	A	S	O	Nov	D	J	F											
															LOCAL CIJE																							
															FORMED (AND IN FORMATION)																							
REPRESENTATIVE																																						
Champion																																						
Lay Leaders																																						
Educators																																						
Rabbis																																						
Professionals																																						
STAFFED																																						
TASKFORCES																																						
In-Service Training																																						
Planning & Self-Assessment																																						
The Lives of Educators																																						
Monitoring & Evaluation																																						
Visits to Israel																																						
PRODUCTS (EXAMPLES)																																						
Educators' Survey																																						
5-Year Plan (Rosh Hashana or G.A.)																																						
Pilot Projects																																						

LEAD COMMUNITIES—A PARTIAL SCENARIO

EDUCATORS' SURVEY

PLAN

REPRESENTATIVE TASKFORCE

STAFF (LOCAL UNIVERSITY?)

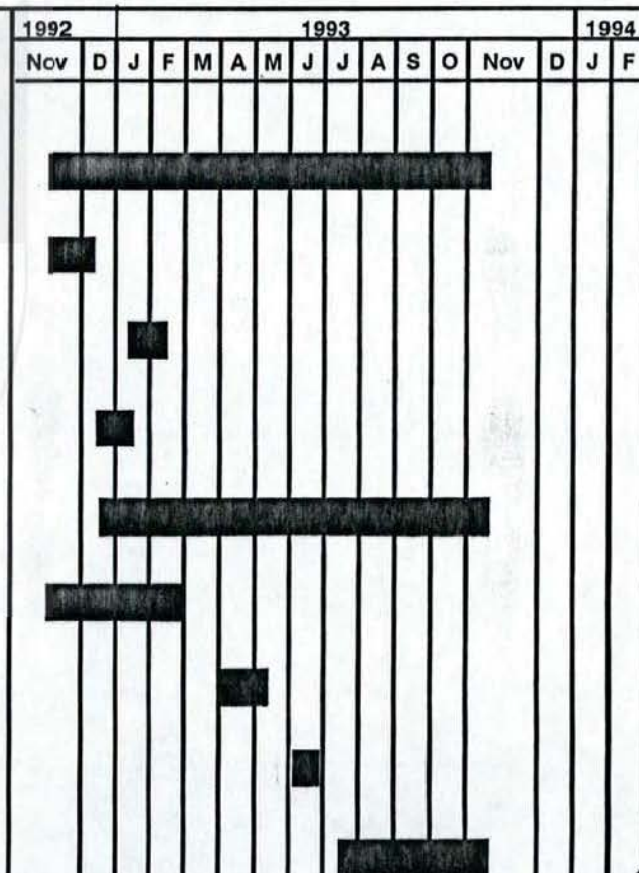
MOBILIZE & INVOLVE EDUCATORS

DESIGN

CARRY OUT

ANALYZE

REPORT & DISCUSS FINDINGS



BEST PRACTICES

Develop Method for Training

Develop Translation Method

6 AREAS COMPLETED

PROJECT PRESENTED

FIRST 2 AREAS SELECTED

CONSULTANTS SELECTED & TRAINED

WORK WITH SUPPLEMENTARY SCHOOL PRINCIPALS

Joint Planning of Implementation

NETWORK WITH EARLY CHILDHOOD TEACHERS

Joint Planning of Implementation

PLAN ROUND 2 OF PROJECT

[illegible]

DESIGN FEEDBACK LOOP

ONGOING WORK

3 REPORTS

[illegible]

LEAD COMMUNITIES—A PARTIAL SCENARIO

5-YEAR PLAN (SEE SEPARATE)

ASSESSMENT OF EDUCATIONAL SYSTEM

Prepare Detailed Guide

Profile

Inventory

Educators' Survey

Achievement Measures

Clients' Survey

Etc.

THE PLAN—ROUND 1

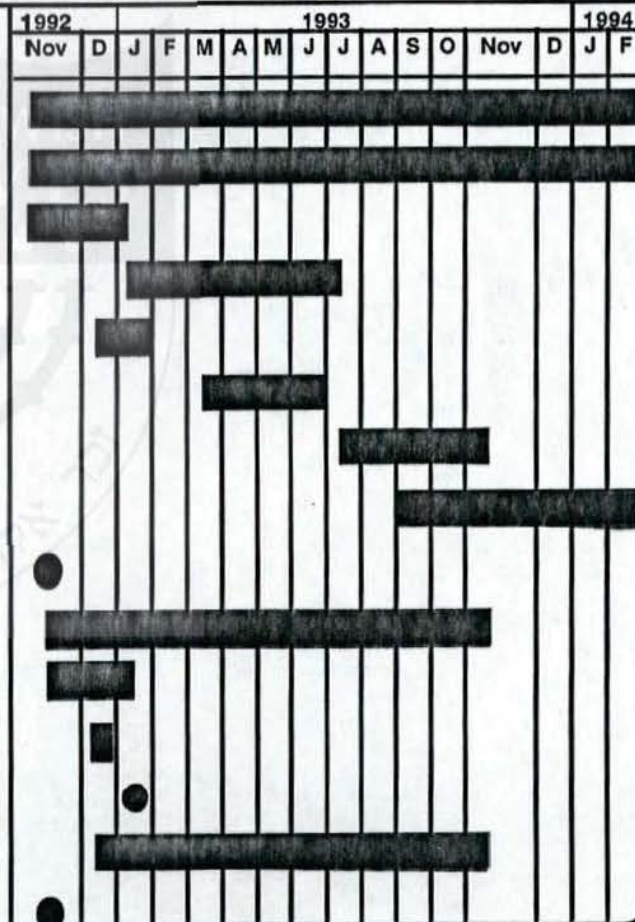
Prepare Detailed Guide

Staff

Taskforce Set-Up

Give Assistance as Needed

Etc.



LEAD COMMUNITIES—A PARTIAL SCENARIO

[illegible]

IMPLEMENTATION OF THE RECOMMENDATIONS

BUILDING THE PROFESSION

In-service training launched
Educators' survey completed — taskforces
dealing with implications
Best practices
Networking—various
2 new hires
1 new position
Educators participation

COMMUNITY MOBILIZATION

Champion recruited
Leadership training
New leaders
Goals discussed
Educators discussed
Networking with cije leaders
Networking between communities

ISRAEL AS A RESOURCE

Plans for “every youth”
Educators summer seminar

RESEARCH

Monitoring, evaluation, feedback
Data base—assessment

CIJE NOVEMBER MEETINGS

11/17/92

WEDNESDAY, NOVEMBER 18

10:00 a.m.

A. Rotman, S. Fox, A. Hochstein

THURSDAY, NOVEMBER 19

11:00 a.m.-12:30 p.m.
Mazer Study

S. Elster, S. Fox, A. Hochstein, A. Rotman, J. Ukele

12:30-6:30 p.m.
NY County Medical
Society, 11th fl

Planning Meeting
Participants:

S. Elster
S. Fox
E. Goldring
S. Greenfield
A. Hochstein
B. Holtz

D. Marom
J. Meier
A. Naparstek
A. Rotman
J.A. Schaffer
J. Ukeles
J. Woocher
S. Wygoda

FRIDAY, NOVEMBER 20

8:30 a.m.-12:00 p.m.
JCCA Conference Room

Planning Meeting continued

MONDAY, NOVEMBER 23

9:00 a.m.-12:00 p.m.	A. Rotman, M. Mandel, A. Hochstein, S. Fox																					
12:00-2:00 p.m.	A. Rotman, M. Mandel																					
6:00-9:00 p.m. UJA/Federation Liff Room	Staff and Lead Communities Planners Meeting Participants: <table border="0" style="width: 100%;"> <tr> <td>L. Azoulai</td> <td>D. Marom</td> </tr> <tr> <td>C. Botwinick</td> <td>J. Meier</td> </tr> <tr> <td>S. Elster</td> <td>H. Neistein</td> </tr> <tr> <td>S. Fox</td> <td>A. Rotman (MON only)</td> </tr> <tr> <td>S. Gelfand</td> <td>Claire Rottenberg</td> </tr> <tr> <td>R. Goodman</td> <td>J. Tammivaara</td> </tr> <tr> <td>A. Hochstein</td> <td>J. Ukeles</td> </tr> <tr> <td>B. Holtz</td> <td>J. Woocher</td> </tr> <tr> <td>Nancy Kutler</td> <td>S. Wygoda</td> </tr> <tr> <td>Marshal Levin</td> <td></td> </tr> </table>		L. Azoulai	D. Marom	C. Botwinick	J. Meier	S. Elster	H. Neistein	S. Fox	A. Rotman (MON only)	S. Gelfand	Claire Rottenberg	R. Goodman	J. Tammivaara	A. Hochstein	J. Ukeles	B. Holtz	J. Woocher	Nancy Kutler	S. Wygoda	Marshal Levin	
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R. Goodman	J. Tammivaara																					
A. Hochstein	J. Ukeles																					
B. Holtz	J. Woocher																					
Nancy Kutler	S. Wygoda																					
Marshal Levin																						

TUESDAY, NOVEMBER 24

8:30 a.m.-4:00 p.m. JCCA Conference Room	Staff & Lead Communities Planners meeting continued
4:30 p.m.-6:00 p.m. Mazer Study	S. Elster, S. Fox, A. Hochstein, A. Rotman, J. Ukeles

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

CIJE STAFF MEETING Thursday, November 19, 1992 Friday, November 20, 1992

Participants: S. Elster, S. Fox, E. Goldring (Arrival 1:00 p.m. Thurs.), S. Greenfield (Arrival 3:00 p.m. Thurs.) , A. Hochstein, B. Holtz, D. Marom, J. Meier, A. Naparstek, A. Rotman, J.A. Schaffer, J. Ukeles (Arrival 3:30 p.m. Thurs.) , J. Woocher, S. Wygoda

AGENDA

THURSDAY, NOVEMBER 19

NOTE: Aside from starting and adjournment times, all times are approximate

12:30
(Including Lunch)
NY County Medical
Society, Suite 1101
15 East 26 St., 11 Fl.

THE FIRST YEAR

A. Hochstein

- Overview and Work Plan
- Desired Outcomes

S. Elster

- Expectations of CIJE

- Pilot Projects
- Goals Project
- Other

A. Hochstein
A. Hochstein

- Planning with Lead Communities

J. Ukeles
A. Hochstein

- Short & Long Range Plan
- Self Assessment

3:30 p.m.

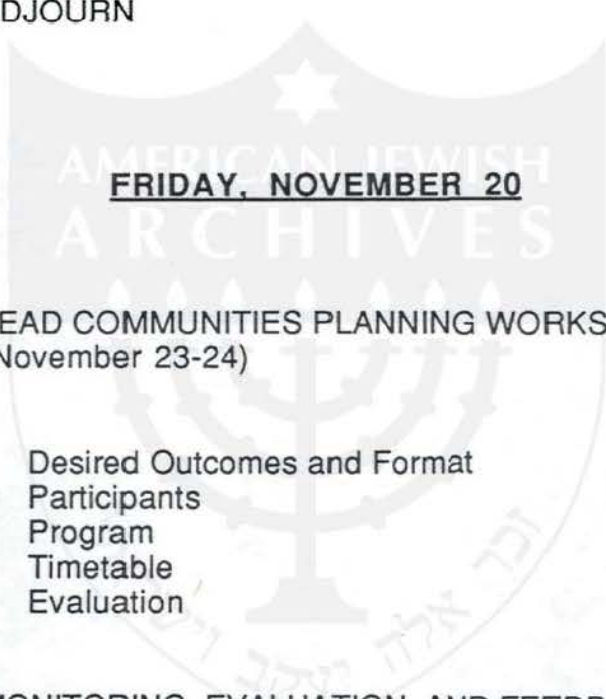
BREAK

(Move to JCCA Conference Room for remainder of meeting)

3:45 P.m.

BEST PRACTICES

B. Holtz

4:30 p.m.	COMMUNITY MOBILIZATION AND WORK PROCESS	S. Fox J. Ukeles S. Elster
	<ul style="list-style-type: none"> • Introduction of Lead Communities Idea into the community • Local Mechanism for Implementation • Organizational and Process Issues 	
5:45 p.m.	GOVERNANCE AND FINANCES	A. Rotman A. Naparstek
6:30 p.m.	ADJOURN	
 <p><u>FRIDAY, NOVEMBER 20</u></p>		
8:30 a.m. JCCA Conference Room 14th Floor	LEAD COMMUNITIES PLANNING WORKSHOP (November 23-24)	S. Elster A. Hochstein J. Ukeles
	<ul style="list-style-type: none"> • Desired Outcomes and Format • Participants • Program • Timetable • Evaluation 	
10:15 a.m.	MONITORING, EVALUATION, AND FEEDBACK	E. Goldring
11:15 a.m.	OTHER WORK AND NEXT STEPS	A. Rotman
	<ul style="list-style-type: none"> • Purveyors • Next Staff Meeting • Assignments • Timetable • Other 	
12:00 p.m.	ADJOURN	

CIJE MEETING PARTICIPANTS

THURSDAY, NOVEMBER 19 (11:00 A.M.-12:30 P.M.)
JCC Association. Mazer Study. 14th floor

Shulamith Elster
Seymour Fox
Annette Hochstein

Art Rotman
Jack Ukeles

THURSDAY, NOVEMBER 19 (12:30-6:30 P.M.)
15 East 26th Street. 11th floor (NY County Medical Society, Suite 1101)
FRIDAY, NOVEMBER 20 (8:30 A.M.-12:00 P.M.)
JCCA Conference Room. 14th floor

Shulamith Elster
Seymour Fox
Ellen Goldring (from 1:00)
Sol Greenfield (from 3:00)
Annette Hochstein

Barry Holtz
Daniel Marom
Jim Meier
Art Naparstek
Art Rotman

Jo Ann Schaffer
Jack Ukeles
Jon Woocher
Shmuel Wygoda

MONDAY, NOVEMBER 23 (6:00 P.M.-9:00 P.M.)
UJA/Federation. 130 East 59th Street. Liff Room
TUESDAY, NOVEMBER 24 (8:30 A.M.-4:00 P.M.)
JCC Association. Conference Room. 14th floor

LEAD COMMUNITY PLANNERS

Lauren Azoulai (Atlanta)
Steve Gelfand (Atlanta)
Chaim Botwinick (Baltimore)
Nancy Kutler (Baltimore)
Marshal Levin (Baltimore)
Howard Neistein (Milwaukee)

STAFF/CONSULTANTS

Shulamith Elster
Seymour Fox
Annette Hochstein
Barry Holtz
Jim Meier
Art Rotman (MON. only)
Jack Ukeles
Jon Woocher

OBSERVERS

Roberta Goodman
Daniel Marom
Claire Rottenberg
Julie Tammivaara
Shmuel Wygoda

TUESDAY, NOVEMBER 24 (4:30-6:00 P.M.)
JCC Association. Mazer Study. 14th floor

Shulamith Elster
Seymour Fox
Annette Hochstein

Art Rotman
Jack Ukeles

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Lead Communities Planning Workshop November 23-24, 1992

AGENDA

Monday, November 23

- I. Welcome
- II. Workshop Introduction
- III. A Sketch of each Lead Community as a context for improving Jewish Education
 - Atlanta
 - Baltimore
 - Milwaukee
- IV. Lead Communities: A Concept and Its Implementation

Tuesday, November 24

- I. Central Elements:
 - Building the Profession
 - Mobilizing Community Support

Community "Caucuses"

- II. How CIJE Can Help
 - Best Practices and Consultation
 - The Goals Project
 - Monitoring, Evaluation, and Feedback
 - Contributions of foundations, organizations, and providers of programs

III. Organizing for Change: Structure and Process

LUNCH

IV. Work Plan -- YEAR ONE

- Introducing the Project into the Community
- Assessing the Educational System
- Preparing the 5-Year Plan
- Projects for Immediate Implementation

V. Working Together: CIJE and Lead Communities

VI. Next Steps

VII. Evaluation of the Day



PROPOSED FEEDBACK MECHANISM IN LEAD COMMUNITIES

The field researchers are expected to prepare quarterly reports on their findings in Lead Communities. During the first year, the reports will document the state of Jewish education in the three communities, with particular reference to visions for change, mobilization of the communities, and the professional lives of educators. (These reports will presumably be complemented by local self-studies addressing participation rates and other quantitative indicators.) Especially in the first quarterly report, the field researchers will document the process of becoming a Lead Community, and they will monitor the process throughout the year. Each community's report will reflect the particular pace and direction of planning within that community.

Preparation and Dissemination

The field researchers, with input from the director and associate director of evaluation and their advisory committee, will produce the first set of reports on the Lead Communities by the end of January 1993.

The January reports will be delivered to Art Rotman, the Executive Director of CIJE. He will send each community's report to its respective project director. In a cover letter, he will offer to have our field researchers provide one or more oral presentations to professional and/or lay leaders (at the discretion of the local project director) based on the portions of the report that are appropriate for wider dissemination. Each community will receive only its own report.

Subsequent quarterly reports will be disseminated in the same manner, subject to modification based on our experience in January.

Content of the First Report

The first report must document the process of becoming a Lead Community. It must reveal the critical issues facing the Lead Communities as they attempt to mobilize and invigorate their systems of Jewish education. Examples of possible issues are:

- mobilization and cooperation among various groups within lead communities, e.g., federation professional and lay leaders
- achieving consensus within communities about what it means to be a "Lead Community"
- bringing educators into the Lead Community process
- getting community members to express visions for Jewish education.

Program

Monday, November 23

6:00PM	Welcome Workshop Introduction	Art Rotman Jack Ukeles
6:30PM	Dinner	
7:30PM	Towards Systemic Change in Jewish Education The Genesis of the Lead Communities Concept	Seymour Fox Annette Hochstein
9:00PM	Open Discussion of the Lead Communities Project	Shulamith Elster

Tuesday, November 24

8:00AM	Coffee	
8:30AM	Review of Lead Communities Planning Calendar	Jack Ukeles
9:00AM	A sketch of each Lead Community as a context for improving Jewish education <ul style="list-style-type: none"> • Atlanta • Baltimore • Milwaukee 	<hr/> <hr/> <hr/>
10:30AM	A Portrait of a Lead Community [Plan]	Shulamith Elster
11:30PM	Planning Guide	Jim Meier
12:30	Lunch	
1:30PM	Connections <ul style="list-style-type: none"> • Introducing Best Practices • The Talent Bank • Continental Educational Resources • Continental Financial Resources 	Barry Holtz Jim Meier Shulamith Elster Shulamith Elster
3:00	Issues <ul style="list-style-type: none"> • Toward a common language: what do we mean by "improvement"; "system"; "settings" "populations" "and" "programs" • How should the CIJE staff interact with the Community staffs • When should we work as a foursome and when as a set of doubles? • Where in the process it makes sense to have a community-specific approach and where it makes sense to have a general North American Approach. • Agenda: Timing and content of Meeting in January with execs and lay leadership 	Jack Ukeles
4:30	Adjournment	

STEVEN E. GELFAND

4629 Smoke Rise Lane

Marietta, Georgia 30062

Home: 404/992-1292 Office: 404/870-1600

SUMMARY

^{FIFTEEN}
Fourteen years of Federation experience in planning, allocations, and campaign with additional responsibility for staffing and/or supervising community relations, public relations, women's division, endowment fund, leadership development, projects in Israel and Federation management functions.

EMPLOYMENT

8/83-Present

Atlanta Jewish Federation

*Associate Executive Director**Assistant Director***Planning, Allocations and Agency Relations Responsibilities**

- staffed community planning, allocations, capital planning and strategic planning committees
- supervised demographic study
- supervised strategic planning process
- designed and implemented priority-setting process
- managed resettlement program

Campaign Responsibilities

- staffed major gifts upgrade effort, and six campaign divisions (builders & real estate, mercantile, manufacturing & sales, physicians, dentists, attorneys)
- staffed President's Mission, Young Leadership Mission, Community Mission, Family Mission and Washington Missions
- staffed long range campaign planning committee
- provided capital campaign consultation to local agencies

Communications Responsibilities

- developed communications strategy
- supervised preparation of all public relations and advertising efforts, including Annual Report
- worked with advertising agency
- spoke to news media on behalf of Federation

Management Responsibilities

- supervised planning and allocations associates, community relations director, endowment fund director, Young Leadership intern, program development director, public relations staff, in addition to supervising Israel projects, and community development function
- staffed Jewish Family Services, Hillel and Hebrew Academy executive search committees
- interviewed candidates for all professional positions
- administered FEREP program
- staffed Board of Trustees in executive's absence

Atlanta Bureau of Jewish Education*Interim Director (3/91-present- 9/92)*

- supervised all management functions and provided board and executive committee support for a \$550,000 agency with nine staff

9/77-7/83

Worcester Jewish Federation

Assistant Executive Director
Acting Executive Director

- responsible for all management functions of small intermediate federation
- responsible for annual campaign of \$2.3 million and endowment fund of \$3 million
- staffed board of directors and executive committee
- supervised five professionals and three support staff

Director of Planning & Research
Planning & Research Associate

- staffed planning and allocations committee
- responsible for annual campaign assignments through \$5,000 giving category
- designed and implemented budget and control system
- managed HUD 202 housing application and building program
- managed resettlement program

PUBLICATIONS AND PRESENTATIONS

Lighting the Way to the Next Century: Year 2000 Committee Final Report. May, 1990.

Managing New Trends in Center-Federation Relations. Journal of Jewish Communal Service, 1986, 63 (2), 144-146.

The Priority-Setting Game. A gamed simulation created for the 1985 Planner's Institute.

Community Development: A Marketing Application. A paper presented at the UJA Institute on Futuristic Fund Raising, July, 1985.

Social Marketing and Federations. Journal of Jewish Communal Service, 1984, 60 (4), 290-298.

NATIONAL POSITIONS

Member, CJF Community Planning Committee, 1990-
Chair, CJF National Resettlement Professional Advisory Committee, 1990-*92*
Member, CJF LCBC/JBC Study Committee, 1991-
Member, CJF Shroder Awards Committee, 1990-*92*
Member, CJF Resettlement Committee, 1990-
Chair, Social Planner's Group, January, 1988 - June, 1989
Co-Chair, Planner's Institute, January, 1988
Chairman, Integrating Demographic Information into Strategic Planning for Campaign. Conference of Jewish Communal Service, May, 1986
Past Member, UJA Advisory Committee on Developmental Services and New Gifts
Past Member, CJF Community Planning Executive Committee
Past Member, AJCOP Membership, Professional Development, and Conference Program Planning Committees

EDUCATION

M.B.A., May, 1982. Boston College.
Specialization in marketing and strategic planning.
M.S.W., May 1976. University of Michigan.
Specialization in community organization.
B.A., Cum Laude, May 1973. State University of New York at Albany.
Major in psychology.

Dr. Chaim Y. Botwinick

Brief Biography

Dr. Chaim Botwinick is Executive Director of the Board of Jewish Education of Baltimore, Inc. Prior to assuming his current post, Dr. Botwinick served as Director of Jewish Education for the UJA-Federation in New York City and Director of Administration and Planning and Assistant to the Executive Vice President at the Board of Jewish Education of Greater New York. He served as Executive Administrator of the Fund for Jewish Education in New York and was research coordinator of the Greater New York Study on Supplementary Schools.

Dr. Botwinick serves on a number of national Boards, including the Executive Committee of the Council for Jewish Education, the National Collaborative on Public and Non-Public Schools, and the Editorial Board of Jewish Education Quarterly. He also served as a member of the New York State Task Force on Equity and Excellence in Education and the Presidents National Commission on the Holocaust.

Dr. Botwinick has a Masters Degree in Organizational Development and a Doctorate in Educational Administration and Supervision.

BIOGRAPHY: LAUREN AZOULAI

5162 Corners Drive

Dunwoody, GA 30338

Home: (404) 671-9293 Office: (404) 870-1611

Current Position: Senior Planning Associate,
Atlanta Jewish Federation

Previous Positions
Held:

Director of Public Affairs, United Way of
Metropolitan Atlanta

Director of Planning and Allocations,
Jewish Federation of South Broward,
Hollywood, Florida

Director, Florida Region of the American
Friends of Tel Aviv University

Director, Women's Division, Greater Miami
Jewish Federation

Assistant Director, Israel Programs
Center, Greater Miami Jewish
Federation

Community Social Worker, Gezer Regional
Council, Naan, Israel

Public Relations Consultant, Hebrew
University of Jerusalem, Israel

Education:

B.S.W., Baerwald School of Social Work,
1976, Hebrew University of Jerusalem,
Specialization in Community Organization

M.S. in Human Service Administration,
1982, Nova University