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Planning workshop at Mandel Institute in Jerusalem,
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Planning Workshops
1991
Jerusalem



Planning Workshop with the Council for Initiatives in Jewish Education

January 7-10, 1991

Held at the Mandel Institute, Jerusalem

Participants:

Ami Bouganim, Shulamith Elster, Seymour Fox, Annette Hochstein, Steve Hoffman, Alan Hoffmann, Danny Marom, Marc Rosenstein, Arthur Rotman

Introduction

S. Hoffman reviewed his paper on the mission, method of operation, and structure of the CIJE (Exhibit 1).

There was a discussion of relative priorities of the recommendations of the Commission in order to determine where to begin: lead communities, building the profession, research, and building community support.

There was general consensus that all areas interact, but that lead communities seems to serve as a focus for the others, as well as being visible, concrete and proactive. Therefore, it was agreed that this area should be our first priority. At the same time, there was consensus that the lead communities effort does not entirely subsume all other areas — and that we therefore must move on the other fronts too.

Lead Communities

Some concerns and dilemmas which arose in the discussion of how to implement the local communities project:

- a. We cannot ignore other efforts underway and focus only on lead communities; there may be other community and foundation projects deserving of our interest and support.
- b. In choosing candidates for lead communities, do we prefer those which have weaknesses (e.g. lack of top leadership) which we can remediate as a demonstration, or do we choose communities which are already strong, to model excellence (but possibly not significantly replicable)?

- c. There may be a tension between the local perception of the community's priorities and our view of what must be done to fulfill our goals for the lead community as a demonstration site or model of excellence.
- d. Possible considerations in selection process:
 - 1. city size
 - 2. geographical location
 - 3. lay leadership commitment
 - 4. planning process underway
 - 5. financial stability
 - 6. availability of academic resources
 - 7. strength of existing institutions
 - 8. presence of some strong professional leadership
 - 9. willingness of community to take over process and carry it forward after the initial period.

In general, there was difficulty in conceptualizing a clear set of criteria for choosing lead communities—and in deciding among the goals of replicability/demonstrability/models of excellence. What emerged from this discussion was consensus on the idea of differentiated criteria: different communities might be chosen for different reasons. On the other hand, we clearly cannot afford to fail: however we choose candidates, we must be convinced that between the community's resources and our own, success is likely.

There was agreement that the CIJE needs to clarify what a lead community is: what are the specific categories of actions and/or programs and/or processes which form the heart of the lead community effort. However, there was no closure on content. Two aspects were considered:

- a. The lead community is characterized by a certain type of planning approach, involving comprehensive, systematic planning; a national perspective and involvement (via various national educational institutions, movements, etc.); and the bringing in of outside resources, human and material.
- b. In addition to "a," the lead community would be required to make certain educational, programmatic commitments (e.g., to in-service training, leadership development, etc.)

The following points were agreed upon:

- a. The centrality of systematic assessment and planning and the role of the CIJE in providing resources and incentives for this process.
- b. The full support of top local lay leadership as a sine qua non.
- c. The overall goal of creating fundamental reform, not just incremental change; of creating new approaches, not just extinguishing fires.

- d. The importance of an approach based upon research, analysis and national decision-making.
- e. Lead communities serve as laboratories, but not as the only laboratories: we might be supporting experiments elsewhere for eventual application in a lead community.
- f. The need to establish a contractual relationship between the CIJE and the lead community.

The discussion moved on to the issue of what the CIJE would provide for a lead community. A model which served as a basis for discussion was that of an account manager: someone who must work closely with a client and understand all of his needs in depth and who must be creative in bringing in various other resources to fulfill those needs.

Thus, the CIJE would serve a facilitating, matchmaking, guiding, managing role. Closure was not attained on an exact role description, but a number of specific applications of this concept were discussed:

- a. Providing a "roster of experts" (persons and institutions) on whom the lead community can call for specific assistance.
- b. Arranging for the seconding of staff resources from existing institutions to the lead community.
- c. Providing up-to-date information on developments in general and Jewish education relevant to the communities' planning process.
- d. Finding and "certifying" best practices is a valuable service which the CIJE needs to provide to assist lead communities. This turns out to be not as simple as first appears. The CIJE will have to invest resources and energy into studying the whole concept of best practice, and developing procedures for finding, certifying, and communicating best practices to lead communities and others.
- e. Serving as a broker between lead communities and foundations, for providing funding and for particular programs relevant to the communities' needs.
- f. Guiding the local planning and research process, providing assistance as needed, quality control, monitoring and feedback.

There ensued a discussion of the essential "building blocks" which would have to be part of a lead community's plan of action. At this stage of our work, the following were suggested:

- a. Programs to train personnel.
- b. Lay leadership development.
- c. Israel program development.
- d. A framework or frameworks for deliberation on educational philosophy and goals.

It was agreed that the "tone" set by the CIJE is important: we need to embody and stand for excellence, continuously to hold before the communities a model of thoughtful, serious planning, research, and implementation.

The consensus was that the CIJE has a responsibility to set the very highest standards possible, demanding tough quality control, never "settling" for compromises on work quality.

ACTION AGENDA FOR IMPLEMENTING LEAD COMMUNITIES

1. Recruit planning team (in-house and/or borrowed) to map out overall program.
2. Develop selection procedure and criteria, and "visiting team" if necessary.
3. Prepare assessment/diagnostic tools to assist communities in self study ("educational profile").
4. Set up monitoring/feedback loop: procedure and framework for ongoing evaluation.
5. Set up process for identifying, documenting, and disseminating "best practice."
6. Set up framework for training and assisting community leadership in developing:
1) proposals, 2) community educational plans, and 3) local monitoring/feedback loop.
7. Establish framework for creating "programmatic menus" to help communities choose new ideas and programs for implementation.
8. Start ongoing process of accumulating "roster of experts" — contacts in the academic world (and other worlds) who can provide assistance to communities in self-examination, planning, and introducing innovations.
9. Start ongoing process of building contacts with foundations with interests in supporting specific categories of programming, in order to help find funding for lead communities' innovations.
10. Develop key elements of contract defining relationship between lead communities and CIJE; what are the specific requirements of the lead community and of the CIJE?
11. Create framework for discussions with and among continental agencies (e.g., JESNA, JCCA, denominational education bodies, etc.) regarding a) their providing services to lead communities; b) the identification of "best practice" programming which may exist on a continental level under the auspices of these agencies and may be useful to lead communities.

Building the Profession

All participants contributed to a list of components of the process of building the profession of Jewish education:

- recruitment
- pre-service training
- in-service training
- senior personnel development
- retention
- image and recognition
- certification
- compensation
- professional organizations and networking
- career development
- supervision and evaluation
- research
- the contribution of general education
- empowerment
- paraprofessionals and volunteers.

Of these, five received highest priority ranking by the group:

1. Pre-service training
2. In-service training
3. Recruitment
4. Compensation
5. Networking

In discussion of how to attack this list, the issue arose of the tension between the CIJE's inclination to do its own process leading to a master plan for, say, pre-service training, and the need to involve other "players" in the planning (e.g., Y.U., J.T.S., H.U.C., J.C.C.A., federation planners, etc.). What will happen if there are conflicts between CIJE's standards, methods and directions and the possibly less exacting approaches of existing institutions? The Mandel Associated Foundations, the Wexner Foundation and others must also be integrated into the picture since they have decided to invest in pre-service education. It was agreed that this is a difficult issue, requiring sensitive and creative thought.

Moving to pre-service training, several suggestions were made:

1. We should see what we can learn from work being done in general education, and possibly use scholars and institutions from that world in our planning.
2. We should talk to all the current "players" to get a picture of the state of the art.
3. We could involve other foundations (Bronfman Foundation to fund Israel Experience components of teacher- training, Wexner Foundation for the training of elites, etc.).
4. The Mandel Institute in Jerusalem may be running a world-wide planning seminar in the spring, of which we could take advantage.
5. We must keep all options open and under careful scrutiny and look at all possible options including those in general education.

A. Hochstein accepted the assignment to produce a paper defining the questions and issues which must be addressed in developing a master plan for pre-service training, to guide the CIJE in beginning the process. A. Hoffmann accepted a similar assignment for in-service education.

With respect to compensation, discussion was brief; no closure was reached on a plan of action, or even whether the CIJE should remain in a study/advocacy role or actually become involved, for example through encouraging the setting up of a national pension plan.

Networking was also discussed briefly; while there was consensus that networks must be studied and supported, no specific suggestions were made.

ACTION AGENDA FOR BUILDING THE PROFESSION

1. A. Hochstein's paper to guide development of a master plan in pre-service training.
2. A. Hoffmann's paper to guide development of a master plan in in-service training.
3. Coordinate efforts with MAF in developing plans with existing pre-service training institutions.
4. Establishing contact with interested foundations to become involved in parts of the program.
5. Set up a planning team to map out efforts and assign roles in pursuing the five top priorities (and others).

Research Agenda

Two aspects of educational research which are necessary were presented:

- Policy research, including monitoring, evaluation and program design.
- Pure research including the education of educators, the philosophy of education, etc.

Participants suggested a number of areas crying out for research attention:

- standardized achievement testing
- market research
- research itself—a “map” of the field is needed
- best practices
- data about teachers
- evaluation methods
- history and philosophy of Jewish education.

And they proposed several different ways in which the CIJE might serve the needs of Jewish educational research:

- a. Coordination of research efforts; influencing and stimulating.
- b. Reaching out to research institutions to create centers for Jewish educational research.
- c. Making useful connections among research needs, researchers, and sources of funding.
- d. Modeling research-based planning.
- e. Work to create new centers of research and train/recruit new researchers.

Three concrete results:

- a. The CIJE will commission a preliminary paper, preferably by Israel Scheffler, on the state of Jewish educational research. This will serve as the basis of the work of a high level task force which will recommend a course of action in order to establish a research capability.
- b. J. Woocher will prepare a thought paper on the issue of maintaining a data base of Jewish educational research.
- c. There is a need to pay special attention to current good research while the longer term approach is being developed.

ACTION AGENDA FOR RESEARCH

1. Commission a preliminary paper, preferably by Israel Scheffler, on the state of Jewish education research and on the need for strategic planning.
2. Based on this paper, set up a high level task force which will recommend a course of action in order to establish a research capability.
3. J. Woocher will prepare a thought paper on the issue of maintaining a data base of Jewish educational research.
4. Seek to develop connections among and support for existing researchers, on specific need-drive projects, while waiting for the entire system to be rebuilt.
5. Actively model research-based planning from the beginning, commissioning research and borrowing researchers to provide a research base for every project we undertake.
6. Make it clear, to our lay leadership and to that of communities (e.g., lead communities) and agencies interacting with us, that we do not move without research.

Developing Community Support

A number of suggestions were made regarding models and directions for pursuing this goal:

- a. The model of the Commission on Jewish Education in North America: give top leaders important decisions to make and let them work with outstanding professionals.
- b. A constant flow of special events, programming, support, and personal cultivation is necessary to keep lay leaders enthusiastic and involved.
- c. We need to select and cultivate first-echelon leaders in the federation and UJA worlds and bring them into education.
- d. We should use exciting and dramatic methods to interest our target leadership; e.g., prestigious retreats, meetings with high-status leaders and scholars like Nobel laureates, university presidents.
- e. We should capitalize on the headway already made in this direction, by working to involve people who already have been touched by the Commission.
- f. Systematic creation of a supportive climate by PR and marketing activities; e.g., wide distribution of *A Time to Act*, newsletters, materials for rabbis, encouragement of Commission members to speak and write.

- g. We should develop new programs for educating lay leadership, and work with existing ones (e.g., CLAL, JESNA, JCCA).
- h. We need to cultivate the heads of the three religious movements.

No specific plan of action was agreed upon, though there was consensus that we need to develop one. Meanwhile, S. Hoffman undertook personally to work to involve several key leaders of national stature in the work of the CIJE.

ACTION AGENDA FOR DEVELOPING COMMUNITY SUPPORT

1. Marketing plan for *A Time to Act*.
2. Efforts to cultivate top echelon continental leadership from non-educational settings for involvement in CIJE.
3. Reach-out to existing top leadership with interest in education (e.g., denominations, Commissioners).
4. Planning team to develop series of high level programs for attracting new top leadership and keeping those already involved excited (e.g., retreats, prestigious meetings, etc.).
5. Establish systematic ongoing public-relations program.

Putting It All Together

The final session was devoted to considering some of the elements of a rough strategic plan, connecting priorities in a logical order and fitting them to a calendar.

Several general principles were agreed upon:

- a. Work of CIJE must be characterized by expertise, quality, and excellence.
- b. We must focus on change — planned, systematic, monitored change.
- c. We must have a comprehensive outlook.

Council for Initiatives in Jewish Education**Planning Workshop****January 7-10, 1991**

Participants: Ami Bouganim, Shulamith Elster, Seymour Fox, Annette Hochstein, Steve Hoffman, Alan Hoffmann, Danny Marom, Marc Rosenstein, Arthur Rotman

INTRODUCTION

S. Hoffman reviewed his paper on the mission, method of operation, and structure of the CIJE and reported that:

- * Letters of invitation to board members have gone out.
- * Board meetings have been scheduled for March, July, and November of 1991.
- * Senior policy advisors group will probably be larger than first thought (up to 20), but will have a different role than that of the senior policy advisors to the North American Commission (generally as advisors on specific questions and ideas).

There was a discussion of relative priorities of the recommendations of the Commission in order to determine where to begin: lead communities, building the profession, research, and building community support.

There was general consensus that all areas interact, but that lead communities seems to serve as a focus for the others, as well as being visible, concrete and proactive. Therefore, it was agreed that this area should be our first priority. At the same time, there was consensus that the lead communities effort does not entirely subsume all other areas -- and that we therefore must move on the other fronts too.

LEAD COMMUNITIES

Some concerns and dilemmas which arose in the discussion of how to implement the lead communities project:

- a. We cannot ignore other efforts underway and focus only on lead communities; there may be other community and foundation projects deserving of our interest and support.
- b. In choosing candidates for lead communities, do we prefer those which have weaknesses (e.g. lack of top leadership) which we can remediate as a demonstration, or do we choose communities which are already strong, to model excellence (but possibly not significantly replicable)?
- c. We must be wary of revealing too much about selection criteria, so as not to arouse resentment among communities not chosen.
- d. There may be a tension between the local perception of the community's priorities and our view of what must be done to fulfill our goals for the lead community as a demonstration site or model of excellence.
- e. Possible considerations in selection process:
 1. city size
 2. geographical location
 3. lay leadership commitment
 4. planning process underway
 5. financial stability
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The following points were agreed upon:

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The discussion moved on to the issue of what the CIJE would provide for a lead community. A model which served as a basis for discussion was that of an account manager: someone who must work closely with a client and understand all of his needs in depth and who must be creative in bringing in various other resources to fulfill those needs.

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The consensus was that the CIJE has a responsibility to set the very highest standards possible, demanding tough quality control, never "settling" for compromises on work quality.

Action Agenda for Implementing Lead Communities

1. Recruit planning team (in-house and/or borrowed) to map out overall program.
2. Develop selection procedure and criteria, and "visiting team" if necessary.
3. Prepare assessment/diagnostic tools to assist communities in self study ("educational profile").
4. Set up monitoring/feedback loop: procedure and framework for ongoing evaluation.
5. Set up process for identifying, documenting, and disseminating "best practice."
6. Set up framework for training and assisting community leadership in developing 1) proposals, 2) community educational plans, and 3) local monitoring/feedback loop.
7. Establish framework for creating "programmatic menus" to help communities choose new ideas and programs for implementation.
8. Start ongoing process of accumulating "roster of experts" -- contacts in the academic world (and other worlds) who can provide assistance to communities in self-examination, planning, and introducing innovations.
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10. Develop key elements of contract defining relationship between lead communities and CIJE; what are the specific requirements of the lead community and of the CIJE?
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BUILDING THE PROFESSION

All participants contributed to a list of components of the process of building the profession of Jewish education:

- * recruitment
- * pre-service training
- * in-service training
- * senior personnel development
- * retention
- * image and recognition
- * certification
- * compensation
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- * career development
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- * the contribution of general education
- * empowerment
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Of these, five received highest priority ranking by the group:

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In discussion of how to attack this list, the issue arose of the tension between the CIJE's inclination to undertake its own process leading to a master plan for, say, pre-service training, and the need to involve other "players" in the planning (e.g., YU, JTS, HUC, JCCA, federation planners, etc.). What will happen if there are conflicts between CIJE's standards, methods and directions and the possibly less exacting approaches of existing institutions? The Mandel Associated Foundations must also be integrated in the picture since it has decided to invest in pre-service education. It was agreed that this is a difficult issue, requiring sensitive and creative thought.

Moving to pre-service training, several suggestions were made:

1. We should see what we can learn from work being done in general education, and possibly use scholars and institutions from that world in our planning.
2. We should talk to all the current "players" to get a picture of the state of the art.
3. We could involve other foundations (Bronfman Foundation to fund Israel Experience components of teacher-training, Wexner Foundation for the training of elites, etc.).

4. The Mandel Institute may be running a world-wide planning seminar in the spring, of which we could take advantage.
5. We must keep all options open and under careful scrutiny (e.g., Stanford vs. existing training institutions).

A. Hochstein accepted the assignment to produce a paper defining the questions and issues which must be addressed in developing a master plan for pre-service training, to guide the CIJE in beginning the process.

A. Hoffmann accepted a similar assignment for in-service education.

With respect to compensation, discussion was brief; no closure was reached on a plan of action, or even whether the CIJE should remain in a study/advocacy role or actually become involved, for example through encouraging the setting up of a national pension plan.

Networking was also discussed briefly; while there was consensus that networks must be studied and supported, no specific suggestions were made.

Action Agenda for Building the Profession

1. A. Hochstein's paper to guide development of a master plan in pre-service training.
2. A. Hoffmann's paper to guide development of a master plan in in-service training.
3. Coordinate efforts with MAF in developing plans with existing pre-service training institutions.
4. Establishing contact with interested foundations to become involved in parts of the program.
5. Set up a planning team to map out efforts and assign roles in pursuing the five top priorities (and others).

RESEARCH AGENDA

Two aspects of educational research which are necessary were presented:

- * Policy research, including monitoring, evaluation and program design.
- * Pure research including the education of educators, the philosophy of education, etc.

Participants suggested a number of areas crying out for research attention:

- * standardized achievement testing
- * market research
- * research itself -- a "map" of the field is needed
- * best practices
- * data about teachers
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- * history and philosophy of Jewish education.

And they proposed several different ways in which the CIJE might serve the needs of Jewish educational research:

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- c. Making useful connections among research needs, researchers, and sources of funding.
- d. Modeling research-based planning.
- e. Work to create new centers of research and train/recruit new researchers.

Three concrete results:

- a. The CIJE will commission a preliminary paper, preferably by Israel Scheffler, on the state of Jewish educational research. This will serve as the basis of the work of a high level task force which will recommend a course of action in order to establish a research capability.
- b. J. Woocher will prepare a thought paper on the issue of maintaining a data base of Jewish educational research.
- c. There is a need to pay special attention to current good research while the longer term approach is being developed.

Action Agenda for Research

1. Commission a preliminary paper, preferably by Israel Scheffler, on the state of Jewish education research and on the recommended next steps.
2. Based on this paper, set up a high level task force which will recommend a course of action in order to establish a research capability.
3. J. Woocher will prepare a thought paper on the issue of maintaining a data base of Jewish educational research.
4. Seek to develop connections among and support for existing researchers, on specific need-driven projects, while waiting for a system to be built.
5. Actively model research-based planning from the beginning, commissioning research and borrowing researchers to provide a research base for every project we undertake.
6. Make it clear, to our lay leadership and to that of communities (e.g., lead communities) and agencies interacting with us, that we do not move without valid data.

DEVELOPING COMMUNITY SUPPORT

A number of suggestions were made regarding models and directions for pursuing this goal:

- a. The model of the Commission on Jewish Education in North America: give top leaders important decisions to make and have them working with capable professionals.
- b. A constant flow of special events, programming, support, and personal cultivation is necessary to keep lay leaders involved and enthusiastic.
- c. We need to select and cultivate first-echelon leaders in the federation and UJA worlds and bring them into education.
- d. We should use exciting and dramatic methods to interest our target leadership; e.g., prestigious retreats, meetings with high-status leaders and scholars like Nobel laureates, university presidents.
- e. We should capitalize on the headway already made in this direction, by working to involve people who already have been touched by the Commission.

- f. Systematic creation of a supportive climate by PR and marketing activities; e.g., wide distribution of A Time to Act, newsletters, materials for rabbis, encouragement of Commission members to speak and write.
- g. We should develop new programs for educating lay leadership, and work with existing ones (e.g., CLAL, JESNA, JCCA).
- h. We need to work closely with the heads of the four religious movements.

No specific plan of action was agreed upon, though there was consensus that we need to develop one. Meanwhile, S. Hoffman undertook to involve several key leaders of national stature in the work of the CIJE.

Action Agenda for Developing Community Support

1. Marketing plan for A Time to Act
2. Efforts to cultivate top echelon continental leadership from non-educational settings for involvement in CIJE.
3. Reach-out to existing top leadership with interest in education (e.g., denominations, Commissioners).
4. Planning team to develop series of high level programs for attracting new top leadership and keeping those already involved interested (e.g., retreats, prestigious meetings, etc.).
5. Establish systematic ongoing public-relations program.

PUTTING IT ALL TOGETHER

The final session was devoted to building a rough strategic plan, connecting priorities in a logical order and fitting them into a calendar.

Several general principles were agreed upon:

- a. Work of CIJE must be characterized by expertise, quality, and excellence.
- b. We must focus on change -- planned, systematic, monitored change.
- c. We must have a comprehensive outlook.

The next six months:

By February 1

- * Annette Hochstein's paper on how to construct a plan for pre-service training.
- * Alan Hoffmann's paper on how to construct a plan for in-service training.

By February 15

- * Response from Israel Scheffler on willingness to do paper on planning for research capability.

By March board meeting

- * Prepare for board meeting. Institute program similar to that of North American Commission--to work with board members.
- * Set up basic structure of CIJE; recruit lay leaders and professional staff; have financial and logistic setup in place.
- * Have planners in place to begin work on overall strategic plan for CIJE.
- * First stage of lead communities work: preparation of teams to service lead communities, determination of selection criteria and process.
- * Progress Report on work with MAF and other foundations on aspects of CIJE program.
- * PR efforts in place: marketing of A Time to Act, reports to foundations and national agencies.
- * Jon Woocher's paper on establishing/maintaining a database on Jewish educational research.

By July board meeting

- * Establish panel for developing best practices research.
- * Recruit senior policy advisors, including some for "monitoring/feedback."
- * Strategies formulated for attacking pre-service and in-service training.

By January, 1992

- * Report of the task force on developing a research capability.
- * Lead communities chosen and planning processes in place.

In addition to this timetable, a number of efforts were mentioned which did not have specific deadlines attached to them:

- * developing a "roster of experts"
- * cultivating a relationship with a small group of high-status lay leaders
- * constant attention to public relations and information dissemination
- * cultivation of relations with foundations.

In the course of discussion, one major concern raised regarding the plan of work of the CIJE was the lack of a sufficient "in-house" staff to carry out all of the required functions of the Council. Several points were mentioned.

- a. This is indeed a problem.
- b. We have to call upon all the resources we can.
- c. We need to plan training for both our own staff and the staffs of the lead communities' planning efforts -- probably jointly; thus, we can expand the pool of people who "think and operate like we do."
- d. We must be careful in using "outside" experts, to integrate them with our own staff and make them a part of our effort.