MS-831: Jack, Joseph and Morton Mandel Foundation Records, 1980–2008.
Series C: Council for Initiatives in Jewish Education (CIJE). 1988–2003.
Subseries 3: Lead Communities, 1988–1997.

Box	Folder
32	2

Monitoring, Evaluation, and Feedback (MEF). Advisory Committee meetings, 1994-1995.

Date: Tue, 8 Feb 1994 23:00 CDT

From: <GAMORAN
Subject: agenda -- I will bring hard copies to the meeting -- see you Thurs!
To: ALANHOF
Original_To: ANETUS, GAIL, BARRY, ALANHOF, DANP, ELLEN, GINNY

CIJE
MEF Consultation
February 10, 1994

Agenda

1. Six-month review of the MEF project: August 1, 1993 - Jan 31, 1994

2. Understanding mobilization

   a. Defining, measuring, identifying standards

   b. The role of monitoring and feedback

3. Community profiles

   a. educators survey

   b. looking forward to institutional profiles and market survey(s)

4. Studying goals

   a. Taking stock

   b. How will we identify goals as they (hopefully) emerge?

   c. How will we select among goals for further study?

5. Measuring outcomes

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5. Measuring outcomes

CITE: MEF
— Advisory Ctee
New RE

Date: Tue, 15 Feb 1994 18:02 CDT

From: <GAMORAN
Subject: memo I sent to field researchers -- comments welcome
To: ALANHOF
Original_To: ANETUS, ALANHOF, GAIL, BARRY, DANP
Original_cc: ELLEN

February 10, 1994

To: Julie, Roberta, and Bill
From: Adam and Ellen
CC: Alan, Gail, Barry, Annette, Seymour, Steve, Dan
Re: work plan of the MEF project

In our consultation with Annette, Seymour, and Steve on February 10, we gained a number of new insights with important implications for our ongoing work. I'm writing to share those insights with you, and to spell out what I see as their implications for our work. I hope you will discuss them together in your meetings on Feb. 15-17.

The meeting covered three main topics: understanding mobilization, community profiles, and studying goals.

Understanding Mobilization

All three of the major respondents to our mobilization reports (Alan, Annette, and Steve) stressed the need for a more developed and focused assessment of the breadth and depth of mobilization in the lead communities. As Alan put it,

> Because the report is written consistently from the centre outwards and shows little evidence of testing the degree and depth of mobilization of the key lay and professional actors in Milwaukee, we don't know about the penetration of the mobilization. One is left wondering, and this happens every time I visit there, whether we have an elaborate structure for mobilization without the necessary penetration. This probably is a result of the fact that...we have no benchmarks for mobilization in any community.

In light of these comments, I posed the question to the group: How should we recognize mobilization? What are the key criteria? How can we assess the extent and depth of mobilization in a more concrete way than we have done before?

Together, we arrived at two responses. First, we obtained the attached list of eight criteria which, we are advised, constitute mobilization. I see this as a very helpful elaboration of information which we have received in the past. As you'll recall, in the past we had to come up with our own definition of mobilization, after reading through all the relevant CIJE documents. Through this discussion, we were able to pin down a more specific list, which includes not only criteria, but suggested indicators of those criteria. I think this will be enormously helpful in carrying out our monitoring and reporting in the future.

Second, our discussion led to the realization that we (all of us, not just MEF) have not yet developed an adequate conceptual framework for studying the mobilization of Jewish communities. What is needed is a rich discussion of the issue, laying out both concepts and indicators. A primary source of information would be interviews with top professionals and lay persons in this field, such as Steve Hoffman, Mark Gurvis, Barry Schrage, Gail Dorph, Jon Woocher, Mort Mandel, and Chuck Ratner. Each of these individuals has experience in what it means to try to galvanize a Jewish community around a focal issue, particularly the issue of continuity.

I would like the MEF field research team to take up this assignment later this spring. I envision a paper on the meaning of community mobilization, taking into account CIJE "theory," our investigations in lead communities so far, and the insights of experts. The paper would likely include the eight elements that were suggested in our meeting today, but in a more sophisticated and conceptually grounded framework. Other criteria may also emerge from the interviews. Moreover, the paper would include not only concepts, but indicators as well. In this way, we would "establish benchmarks for mobilization" to be used in future assessments.

As a first step, I suggest that the field research team prepare a memo suggesting how this project could be carried out, including any modifications that seem appropriate.

It seems to me that this project dovetails nicely with Roberta's dissertation. Also I'm sure we'll benefit from Julie's expertise in figuring out how to ask the experts the right questions to find out from them how we should conceive of and recognize the mobilizaion of a Jewish community.

Community Profiles

I introduced our thinking on the topic by leading the group through Bill's memo of January 22. We discussed a number of possible directions in which this project could go. It seems there are at least three levels of detail that one could collect on Jewish educational institutions which might constitute institutional profiles. One level are the basic "facts," such as those listed in Box 4 and those listed on the bottom of the first page of Bill's memo. A second level is to get somewhat richer information about what's going on in the institution. This might include information about "school climate," program coherence, parent involvement, and so on, at the level of detail one might obtain from focus groups of teachers and an interview with a principal. A third level of information would be an observational study of classrooms to determine the quality students' educational experiences.

Bill's discussion of the three purposes, and his questions about timing, agenda, and inter-community relations, were well received, if not really answered. The profile data are closely linked to goals, as Bill pointed out. Thus, one item that needs to be included is information about institutional goals. At the first level of detail, this might be as simple as whether the institution has a mission statement, and how it was produced. At the second level, we could ask whether the institution has a coherent mission, quite apart from whether it has a mission statement. At the third level, we would examine whether stated visions were reflected in classrooms.

Another way of looking at the goals issue is to ask about standards for the items on which we may propose to study for the profiles. What are the standards to which we aspire? If we can answer that question, we will have guidance about what items to study for the profile. I took this to be in keeping with Bill's point that we need to have some idea of where we want to go, in order to gather the right information at the baseline.

Both Box 4 and Bill's list are heavily skewed towards formal education. It is essential that we develop indicators for informal settings as well. Informal education has been essentially left out of our studies so far, and it is critical that it be included in this part of our work.

Where to go with this? To develop a rationale, we need to do more thinking, and more consulting with experts in the area of Jewish schooling. We need to ask, what are the key elements of a profile of a Jewish educational institution? What makes a difference? We should think very broadly at this point. After we gather some collective wisdom, we will be in position to propose what sort of indicators we wish to start measuring.

Thus, we have the task of talking to experts in the field of Jewish education -- Gail and Barry will suggest some names, and I'd make sure to include Roberta on the list -- to establish a set of both basic facts about Jewish educational institutions, and more in-depth list of aspect of schools and programs that could be investigated. This information should be summarized in a memo or paper. This information should lead to a proposal for studying the basic facts, which is where we should start in our data collection.

I think this task is in keeping with our current plans. It adds the notion that we should think more broadly, even if we intend a narrowly-focused data collection in the short term. It also emphasizes the need for a rationale, before we start collecting data.

Clearly this is a task on which Bill should take the lead, but Roberta's and Julie's insights should also figure prominently. I think this should be a team effort.

Studying Goals

Over the long term, when educational institutions in the lead communities have articulated goals, we hope to measure progress towards the goals. To prepare for that, I wanted to talk about three issues: taking stock so far, identifying goals when they emerge, and selecting goals for long-term study.

I began by asserting that we had a clear picture of the state of goals for Jewish education in the communities: There are no well-articulated, coherent, widely-shared goals with clear implications for action. Although the group accepted this statement, they indicated that this was not enough, because it says nothing about goals of individual institutions. From this discussion we arrived at the need to include the presence or absence of a mission statement in the institutional profiles and, to the extent it seems feasible, the institutional profiles could also contain information on how the mission was developed and how widely it is shared. I was also reminded that some institutions may have a coherent mission but no mission statement.

On recognizing meaningful goals, Seymour suggested three types of criteria: goals that a philosopher would recognize as meaningful, goals that would serve the purposes of a policy-maker (e.g., they would galvanize a nation or a community), and goals that can drive what goes on in classrooms. An important insight I gained from this discussion is that the quality of a goal depends partly on the context (as opposed to the content of the goal). For example, the U.S. federal goal that "All children should start school ready to learn" is arguably an effective goal from the policy-maker criterion because it is a national rallying point, where as one Jewish movement's goal that "Jews should learn the Hebrew language" is not an effective goal because it does not lead to action on any level.

The discussion of recognizing goals when they emerge, and selecting goals for further study, will be resumed in the future. For now, the main implication for our work is that whether there is a mission statement (or a mission), and how it was developed, should be part of the institutional profiles, as noted above.

Miscellaneous

A couple of miscellaneous items came up in the course of our discussions:

(a) After sign-off by Adam, update memos intended for CIJE staff should go to Ginny, with a request that she distribute them to Alan, Barry, Gail, and Annette. If it makes sense to give the memo directly to a staff member (e.g. Gail will be in Milwaukee, etc.), a copy should still go to Ginny with instructions on who to send it to.

Please mail a full set of past update memos to Ginny.

(b) Please give me a list of all the interviewees for the study

of the professional lives of educators in Baltimore. I am to assure Seymour that we've talked with a representative group, and with all the very important figures.

Towards a Work Plan for 1994
These discussions may result in a partial revision of our work plan for the remainder of 1993-94 and the beginning of 1994-95. (I'm starting to think of this as a work plan for 1994, i.e. a calendar year instead of an academic year.) Here's how I think our work shapes up. The person listed is the person with primary responsibility, but all of these tasks should be conceived of as team efforts.

Tentative Work Plan for 1994

Complete report Milwaukee teaching force (Adam, Ellen)
Complete report on mobilization in Baltimore (Julie)
Complete report on mobilization in Milwaukee (Roberta)
Write report on year 1 1/2 mobilization in Atlanta (Roberta)
Write report on professional lives of Jewish educators in

Hit <CR> for next page, : to skip to next part...
BMAIL>
←[2J←[H
Baltimore (Julie)
Write report on Baltimore teaching force (Adam, Ellen)
Write report on Atlanta teaching force (Adam, Ellen)
Write paper on Jewish community mobilization: concepts and measures (Roberta, Julie, Bill)
`Write memo or paper on institutional profiles: concepts and measures, broadly conceived (Bill)
Write proposal for short-term data collection for insititutional profiles: indicators and rationale (Bill)
Commence data collection for institutional profiles (Bill, Julie, Roberta)
Commence report on teachers in all three communities (Adam, Ellen, Julie, Roberta, Bill)
Ongoing monitoring and feedback (Julie, Roberta, Bill)

What do you think about this possible work plan? I look forward to hearing from you after your meetings on Feb. 15-17. If I remember correctly, I should expect something in writing, and then we will talk about it in our next conference call.

Indicators of Community Mobilization

1. Are powerful, key, top lay leaders mobilized?
   Are they recruiting their peers to participate?
   Do they represent the quality and level of leadership desired (quality measured in "wealth, wisdom, and/or work")?

2. Is there a full-time professional staff person for LC?

3. Is there a Triad or Team in place to lead and pull the LC process together, consisting of a:
   1) "champion" lay leader,
   2) supportive federation executive, and
   3) full time educational professional

4. Is there a wall-to-wall coalition?
   Is there a cross section of Rabbis, congregational leaders, educational professional leaders, and lay leaders from all sectors, not only representatives?
   Indicators of a wall-to-wall coalition may include:
      Do people attend meetings?
      Are they telling others about the meetings? What are they telling others?
         --ask the participants, ask others
      Are people taking seriously what is happening in these meetings?
         --Are some people worried about not being included?
         --Are members reporting back to someone about what is going on?
      Are members accountable to anyone, such as a board?
      Are there outreach mechanisms in place, such as a LC bulletin?

5. Are Rabbis and educators involved with LC beyond the wall-to-wall coalition?
   For example, to what extent do their agendas (meetings, workplan, programs) overlap with CIJE's?
   Is LC on their agendas?
   Are they briefed regularly about CIJE?
   Are there programmatic indications of LC work?

6. Is there significant, additional funding for education?
   For example, what percent is additional?

Is there movement toward this goal?

7. Is there ferment in the community about Jewish Education?
   Ferment at two levels:
      1)Establishment and Leadership, and
      2)Community at Large.
   For example, what is in the Jewish newspaper?
   What is on the agenda for public debate?
   Is Jewish education being discussed in the annual campaign?

8. Is anything happening in the area of Jewish education? For example, are new positions being created? Are vacant positions being filled? Is there centralized planning for Jewish continuity?

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION
MONITORING, EVALUATION & FEEDBACK
Advisory Committee

Thursday, August 25, 1994
11:00 am - 7:00 pm
Sheraton Cleveland City Centre
777 St. Clair Avenue
Cleveland, OH 44114
Ph. 216-771-7600
Fax 216-566-0736

Participants: ADH, AG, EG, GZD, BWH, MI, SF, ARH, SHH, NR

AGENDA

I. Review of MEF Work To Date

II. The Study of Educators

A. Integrated-Cross Community Report

1. Board Presentation
2. Policy Brief for the GA
3. Dissemination and Presentation to North America

1) Hired
– Consult
1) Goals
2) Ed

B. Next steps with this data

1. Additional Analyses and reports
2. Developing a module for dissemination and use in NA
3. Analysis of Educational Leaders Surveys
4. Research papers for a broader audience

MONITORING
&
Field
1) eval
2) next steps

III. Proposed Workplan for MEF: 1995 - Next Steps for MEF Project

A. Possible Topics

1. Institutional Profiles
2. Monitoring and Evaluating the Goals Project
3. Monitoring and Evaluating the Leadership Development Project
4. Monitoring and Evaluating Personnel Action Plans and Implementation
5. Studying Informal Education and Educators
6. Building the data base on Jewish Education: Additional Survey Work in LC's or beyond
7. Cross-community Mobilization Report

B. Staffing MEF in light of next steps

1. The Role of Field Researchers
2. Alternative Staffing Models

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memo
ADAM/ELLEN
conclusion
(1) - (11) Talks to be done this fall.
5 major talks
(1) Further version teacher survey
(2) educational leadership
(3) module for studying J. educators in a community
(4) M & E of personnel action plans in LC's
(5) goals project in LC's

Participants: ADH, AG, EG, GZD, BWH, MI, SF, ARH, SHH, NR

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B. Next steps with this data

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2. Developing a module for dissemination and use in NA (1)
3. Analysis of Educational Leaders Surveys (2)
4. Research papers for a broader audience

III. Proposed Workplan for MEF: 1995 - Next Steps for MEF Project

A. Possible Topics
[illegible] INDICATORS
1. Institutional Profiles
2. Monitoring and Evaluating the Goals Project (3)
3. Monitoring and Evaluating the Leadership Development Project (4)
4. Monitoring and Evaluating Personnel Action Plans and Implementation (5)
5. Studying Informal Education and Educators (6)
6. Building the data base on Jewish Education: Additional Survey Work in LC's or beyond
7. Cross-community Mobilization Report
8 - [illegible] Educators [illegible]

B. Staffing MEF in light of next steps

1. The Role of Field Researchers
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  2. Monitoring and Evaluating the Goals Project
  3. Monitoring and Evaluating Personnel Action Plans and Implementation
  4. The Study of Informal Education and Educators
  5. Building the data base on Jewish Education: Additional Survey Work in LC's or beyond

B. Staffing MEF in light of next steps
  1. The Role of Field Researchers
  2. Alternative Staffing Models

NOTES **01.24.95**

1. Re MEF Meeting - in my notes I have a Professor Israel Sheffler - do I need to reserve a room for him on the 8th at the Sheraton Commander in Cambridge?

2. Re Annette - should I schedule an appointment in NY on the 10th?

GET PG for me.

3. Peter Geffen (595-7087) called re meeting on 02.14.95 from 5 pm onward but you are scheduled to leave for Utah at 5:30 so I left a message for him to call me to arrange a mutually amicable time for the two of you to meet.

Take home for the end

4. Reminder: Schedule time to review fellowship applications submitted to the Memorial Foundation for Jewish Culture for the academic year 1995-1996. Evaluations must be completed and returned to them by March 1, 1995.

5. Please note that you have a 10 a.m. meeting on the Thursday with Rabbi John Schechter who was referred by Danny Allen. He is a congregation rabbi who runs a Hebrew H.S. and teaches for CLAL. 201 762-7067 I am to call him back only if this appointment is NG. GOOD.

6. Re Cindy Chazan - did you want anyone to review the materials she sent before she returns on the 3rd? (Everyone — Thanks)

7. Joe Reimer, Brandeis called. (SLB to CB re decision 617 736-2996) Susan Shevitz has another evening obligation on the 9th. Therefore, can you and Barry meet them for dinner in Brookline at 5:30 p.m.? He said you could still leave at 7:00 p.m.

Or, option #2, Susan could meet with you and Barry on the 8th in the evening in Cambridge and Joe could meet with you on the 9th, also in Cambridge.

Please let me know which option you prefer.

Barry and I can be in Brookline by 5'15 p.m. They shld name a restaurant (Barry is a vegetarian)

5'15 in Brookline OK

Natalie Greene
Administrator
2990

Alan,

Here are the advance materials for the Feb. 9 MEF meeting. If the contents look ok to you, I think all staff should get these materials, regardless of whether they'll be at the meeting.

Adam

Distribution list:

- Seymour Fox
- Annette Hochstein
- Mike Inbar
- James Coleman
- Steve Hoffmann
- Nessa Rapoport
- Gail Dorph
- Barry Holtz
- ~~Dan Pekarsky~~ ??

Thanks!

I want to
take to
Harvard with
me next week

Can you get me
Judith W. Little's
article in the
bibliography

10th Anniversary Issue

The Harvard Education Letter

Volume XI, Number 1 *Published by the Harvard Graduate School of Education* January/February 1995

TEACHERS AS LEARNERS

The Old Model of Staff Development Survives In a World Where Everything Else Has Changed

A fundamental mismatch between the demands made of educators and their opportunities for professional growth makes for frustrated and stressed-out teachers

BY EDWARD MILLER

Howard Pitler, principal of L'Ouverture Elementary School in Wichita, Kansas, was excited. His plan to restructure the school into a technology magnet, with computers integrated into all phases of instruction and a schoolwide emphasis on cooperative learning and small-group work, had been approved. And he had discovered HyperCard, the versatile, open-ended Macintosh software that would, he believed, be the centerpiece of his program, enabling teachers to develop their own interactive curricula, suited to their individual needs and interests. He had become an expert user himself, had watched his kids play happily with the program at home, and had successfully taught a course on it at the local university.

Pitler designed a three-day course in which he would teach HyperCard to his entire staff. At noon on the first day, they all went to lunch together. "I suddenly realized that something was terribly wrong," he says. "There were thirty teachers sitting around this big table—people who knew each other and got along really well—but there was dead silence. No one said a word. They were absolutely miserable because they didn't get it, and they felt angry and resentful."

One test of professional development is its capacity to help teachers be informed critics of reform.

Though the L'Ouverture teachers eventually did learn the program, over a period of months, Pitler now looks back on that course as the worst he ever taught. "I had made the techno-nerd mistake of thinking something was easy because it was easy for me," he says. "Some of those teachers had had a total of two hours experience on a Mac. I tried to teach them all together rather than allow them to learn it themselves, at their own pace. Now I see that it's a mistake to think we all need to be in the same place at the same time."

Boring and Irrelevant

Pitler's HyperCard class illustrates one problem with the design of many staff development activities in schools. Research over the last 20 years has consistently shown that teachers learn new methods best not from lectures by experts but by seeing those methods used in actual classrooms, by designing their own learning experiences, by trying out new techniques and getting feedback on their efforts, and by observing and talking with fellow teachers (see "Schools Where Teachers Learn," *HEL*, July 1986). Teachers typically forget 90 percent of what they learn in one-shot workshops, researchers report.

In spite of this well-documented body of research, not much has changed in the world of staff development. Judith Warren Little of the Uni-

LETTER FROM THE EDITOR

Ten Years Old and Growing Strong

About ten years ago, Patricia Albjerg Graham, then dean of the Harvard Graduate School of Education, and Arthur Rosenthal, director of Harvard University Press, had an idea: to publish a newsletter that would bridge the worlds of education research and practice. They saw a need for an authoritative and readable source of information on the theory and practice of teaching and learning—a publication that would help educators do a better job. The result of their brainstorm, the *Harvard Education Letter*, first appeared in February 1985.

As the tenth anniversary issue of *HEL* goes to press, we are struck both by the loyal following this newsletter has won among educators across the world and by the growing complexity of the work these professionals are doing. On issues from homework to cooperative learning to tracking, the *Letter* has helped make the work of our best teachers and scholars accessible to thousands of readers.

Today, the vision of Pat Graham and Arthur Rosenthal remains true. The demands of a Hydra-like school reform movement and the needs of an unprecedentedly diverse (and often troubled) generation of students make teaching in and managing schools more difficult than ever. The need for knowledge and the pressures of time have never been greater.

With this issue, which focuses on professional development and its central importance to school improvement, we thank all who have contributed to the *Letter* in its first decade—especially our editorial board and former editors Helen Featherstone and Adria Steinberg. We acknowledge, with awe, the dedication and achievements of all of you who make our schools work. And we invite you to write us with suggestions on how the *Letter* itself can be a more effective resource for your professional development. Congratulations on *HEL*'s tenth birthday also cheerfully accepted. —EDWARD MILLER

versity of California, Berkeley, says that the old "training model" for teachers' development remains dominant. "Local patterns of resource allocation tend to favor the training model over alternatives," she observes. "The investment in packaged programs tends to consume all or most of the available resources."

A 1994 study of staff development practices in four large urban districts by Barbara Miller and Brian Lord of Education Development Center and Judith Dorney of SUNY New Paltz found that the traditional model—short-term passive activities with limited follow-up—was still common, even though teachers generally found such training boring and irrelevant. Many teachers were angry about being "subjected" to inappropriate, unfocused, or ill-conceived activities. They noted that the kind of teaching they saw at such workshops would be unacceptable in a classroom for children.

What *has* changed is the nature of the demands being made on teachers, who are faced with a staggering array of complex reforms. Teachers are told that they have to set higher standards for all students, eliminate tracking, tailor lessons to kids' individual needs (including those with various disabilities), adopt small-group and cooperative learning techniques, design interdisciplinary and multicultural curricula, work in teams with other teachers, promote "critical" and "creative" thinking instead of rote learning, attend to children's social and emotional needs, rely on "performance assessment" instead of multiple-choice tests, get with the latest technology, encourage active learning in "real-life" contexts, use fewer textbooks, and, on top of everything else, become "agents of change" in their schools.

Contradictory Reforms

The old training model of professional development is simply not adequate for the ambitious visions of schooling in current reform initiatives, argues Little. "Teachers are pressed to move on many fronts at once," she says, "keeping them in an exhausting permanent mode of implementing innovations." Moreover, the demands made of teachers are often contradictory. "Reforms aimed at critical thinking sit in tension with the basic skills reforms that began in the 1960s and are still a prominent part of the urban school improvement landscape," Little points out. "Reformers call for more 'authentic' assessments, but state and local policymakers continue to judge the success of reform efforts by standardized test scores." Because of these tensions and contradictions, she says, one test of professional development is its capacity to help teachers act as shapers, promoters, and well-informed critics of reform.

The context for changing the way teachers work has become extremely complicated, says Barbara Neufeld of the Harvard Graduate School of Education. "The problem is that many teachers came through schools where they learned how to do the math problem, say, but they don't actually understand why," she explains. "Or the teacher may understand the math but not understand what makes it difficult for children. Teachers often don't have a repertoire of examples and skills to help kids understand. They need visual images of what these new kinds of teaching look like—and a human being in the classroom to observe and help them." Few school districts are prepared to support this kind of learning by teachers, and even if they were, there are few people around able to provide it.

"A new kind of structure and culture is required," says Little, "compatible with the image of 'teacher as intellectual' rather than 'teacher as technician.' Also required is that educators enjoy the latitude to invent local solutions rather than to adopt practices thought to be universally effective."

One result of this fundamental mismatch between the demands on teachers and their opportunities for professional growth is a high level of

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frustration and stress and a tendency to blame others for students' failure to learn. "Eventually," says Neufeld, "teachers begin to think, 'I wonder if these children *can* learn.'" Another side effect is the anger and resentment that Principal Howard Pitler encountered at lunch. And even where change is successful, teachers may experience unexpected levels of stress.

"After we became a technology magnet," says Pitler, "we began to see a change in the staff. Without really thinking about it, we had redefined the role of teacher from 'sage on the stage' to 'guide on the side.' We knew in our hearts that this was the most appropriate way to teach, but we were unprepared for the personal loss we felt. We were no longer the sole source of knowledge in the classroom. Now, often it was the student coaching the adult, or students coaching each other with the teacher completely out of the loop. One teacher was talking to me about this change when she burst into tears. 'I don't know who I am anymore!' she said. We ended up bringing in a psychologist to help us through the grieving process."

New Models Emerge

A few new models for effective professional development have emerged in recent years. Milbrey McLaughlin and Joan Talbert of Stanford University concluded from a five-year study of secondary schools that strong professional communities provided a context for sustained learning. They found that the most effective teachers had hooked up with a network of professionals who addressed problems and found solutions together, gaining in their sense of professional identity, motivation, and willingness to undertake challenges. They also make a strong case for the importance of "teacher discourse"—that is, the ways teachers talk to each other about their work—in managing systemic reform.

Robert Kegan and Lisa Lahey of the Institute for the Management of Lifelong Education at Harvard have also been working on new models of teacher discourse as a prerequisite for "transformative" professional development (see below). The Massachusetts Field Center for Teaching and Learning in Boston is widely cited as a model resource for designing teacher-led research, study groups, school networks, and leadership programs. The Center also publishes *Teaching Voices*, a newsletter written by educators, and guides for mentoring, grant-writing, and other staff development concerns.

For Further Information

Institute for the Management of Lifelong Education, 339 Gutman Library, 6 Appian Way, Cambridge, MA 02138; 617-495-3572.

J. Little. "Teachers' Professional Development in a Climate of Educational Reform." *Educational Evaluation and Policy Analysis* 15, no. 2 (Summer 1993): 129-151.

Mass. Field Center for Teaching and Learning, UMass/Boston, 100 Morrissey Blvd., Boston, MA 02125-3393; 617-287-7660.

M. McLaughlin and J. Talbert. "Contexts That Matter for Teaching and Learning." Available from the ERIC Clearinghouse (ED357023, 1993); 800-443-3742.

B. Miller, B. Lord, and J. Dorney. *Staff Development for Teachers.* Education Development Center (55 Chapel St., Newton, MA 02158), 1994.

H. Pitler, L'Ouverture Technology Magnet, Wichita Public Schools, 1539 Ohio, Wichita, KS 67214; 316-833-3075 (e-mail: Pitler@twsuvm.edu).

ADULT DEVELOPMENT

Giving Voice to Our Hidden Commitments and Fears: A Conversation with Robert Kegan

Examining the ways we talk—and don't talk—about our work can lead to professional development that doesn't just inform us but also transforms us

Psychologist Robert Kegan, in his books The Evolving Self *and* In Over Our Heads, *has proposed a new way of understanding the processes of development across the lifespan and the complex mental demands placed on children, adolescents, and adults by modern society. His most recent work, with Lisa Lahey, focuses on how traditional forms of professional development might be adapted to fit better with the needs of educators in today's schools. Kegan is a senior lecturer at the Harvard Graduate School of Education, a senior faculty member at the Massachusetts School of Professional Psychology, chairman of the Institute for the Management of Lifelong Education at Harvard, and a Fellow at the Clinical-Developmental Institute. He was interviewed for the* Harvard Education Letter *by Edward Miller and Terry Woronov.*

HEL: How can professional development for teachers be informed by an understanding of adult development?

Kegan: First, we have to make a distinction between two kinds of professional development: *informative* and *transformative.* Informative training transmits information. It increases the teacher's content knowledge, understanding, and skills. Most in-service staff development is designed on this model. But Lisa Lahey and I are more interested in professional development that is transformative—that enables people to develop more complex capacities of mind. We think that the most powerful changes in professionals' practice come about because professionals change their minds.

HEL: Is there something wrong with the informative type of staff development?

Kegan: Not at all. Informative training increases your fund of knowledge. Lord knows, that's a useful thing. But it is an insufficiently nourishing diet by itself. If in our work with young people we found that their knowledge increased, but they did not develop more complex capacities of mind, we would be disappointed. We should want no less for ourselves as adults.

HEL: What does transformative professional development look like?

Kegan: It begins with school leaders who create contexts for adult transformation. It's ironic that principals and superintendents are known as their communities' chief child educators, but their actual success depends more on their talents as adult educators. One way we have seen school leaders do this is by changing the discourse forms in the organization, by which we mean changing the rules for what one talks about.

Principals' and superintendents' success depends on their talents as adult educators.

HEL: What are these rules and how does one go about changing them?

Kegan: First, by becoming aware of them. Principals, department chairs, and other leaders are discourse-shapers. They influence the nature of the language in the workplace. In every organization there are rules about what's appropriate to discuss, who you can talk to, and what subjects are not okay to bring up.

For example, in many schools it's not considered appropriate to talk about how well your teaching is going, because that would be bragging. At the same time, it's not safe to talk about your teaching going badly. So those very powerful and potentially transformative conversations about practice and how each teacher feels about her work may never take place. At the same time, certain other forms of discourse are quite common: the discourse of complaint, of disappointment, of gossip, of talking behind people's backs.

We have identified five relatively rare forms of discourse that can enhance rather than inhibit professional development by creating a context for transformation. They do not, we find, spontaneously emerge within an organization the way the discourse of complaint or the discourse of gossip does.

The first we call the Discourse of Ongoing Regard, which is about the twin faces of admiration and appreciation. It's more complex than just praising and stroking people, telling them how great they are. That can easily be ungenuine and even a form of manipulation when it's directed to a subordinate. It becomes an indirect way of telling people what you want them to do.

The Discourse of Ongoing Regard is about enlarging the vocabulary of your response to others when you find yourself feeling in some way admiring, moved, inspired, or informed.

HEL: Can you give an example of this form of discourse?

Kegan: I might send you a note saying, "In watching the way you handled that difficult parents' meeting yesterday, I got a sense of another way I could deal with the hard questions from parents that have so often left me feeling unclear what to do." That communication has in it three elements important to effective appreciation and admiration: First, it's specific, rather than a vague "You were just so great in that meeting." Second, it's direct and to the person, as opposed to my standing up at a staff meeting and saying, "Ed was so helpful," and never really delivering the message to you.

But the third, most important, and most difficult to achieve element is that it is not a characterization of you. It's a description of *my* experience, which I am letting you in on. That's what distinguishes it from praise.

Compare that to the very weird and widely practiced form of discourse in letters of recommendation, where every writer has this rich bank of adjectives they draw from: So-and-So is very generous and quick-witted and so on. That's what we think of as appreciation—where we characterize the other person. We dress them in a suit of clothes that they almost always know doesn't really fit.

If I tell you *my* experience, that I was helped by what you did, that should leave you completely uncharacterized, un-pulled-upon, undescribed. There's no record you have to correct. What you're learning is not whether you're terrific or not—that's not for me to say anyway—but how the things you do make a difference in a positive way *to me.* When properly practiced, the Discourse of Ongoing Regard helps create a safer environment for the kinds of learning risks necessary for transformation; it establishes a context for later forms of discourse that are more difficult or threatening.

HEL: That one sounds difficult enough.

Kegan: It can be uncomfortable at first, but once teachers are accustomed to this form of discourse it can carry over into their classrooms. Teachers are professional praise-givers, but they may find after practice with the Discourse of Ongoing Regard that much of how they praise students is really a form of characterization: "You're smart."

HEL: Okay, what's the second form?

Kegan: The Discourse of Personal Commitment or Conviction, which creates a different context for complaints. The discourse of complaint, disappointment, wishing, hoping, and so on is one that leaders don't usually have to work at establishing in their schools. It is already alive and well—and usually unproductive of transformation because all it leads to is letting off steam or looking for allies who will sign on to your particular negative characterization of somebody or some situation.

When subordinates bring complaints to their bosses, the bosses usually feel they have a limited range of responses: they can confirm or deny them, they can defend themselves or the other parties being complained about, or they can sympathize with the complainer's position. None of these is as transformative as the Discourse of Personal Commitment or Conviction, which is a way of inviting people to translate their complaint into a new form: the deeply felt personal commitment or conviction that is actually the source of the complainer's disappointment.

We invite people to identify what they are doing to undermine their own commitments.

HEL: If my complaint is "That faculty meeting was boring and useless," what's the underlying conviction?

Kegan: Ten people with the same complaint might name ten different commitments or convictions. It might be: "I am committed to the importance of making the best use of the precious opportunities we get as a faculty to actually spend time together and focus on the nature of our work. We do that so rarely, and when we do it's in these ritualistic meetings where 80 percent of what happens could have been done by memo."

To help people clarify their commitments, we ask them to finish this sentence: "I am committed to the value or importance of...." The idea is not to try to change the essence of my complaint itself but to locate the underlying cause: the fact that I have a certain commitment or belief. When I complain about a student who's causing trouble in class, the commitment behind my complaint may be to the value of having a nondisruptive class environment. It puts me in a different position, experiencing myself not as a complaining, disappointed person but as a person who holds certain convictions.

HEL: Does it put the leader in a different position as well?

Kegan: It changes the way leaders receive complaints. Usually either they just don't want to hear them, or they may have a view of themselves as heroic, healing leaders, and they want to hear all the complaints so they can make everything better for people. We invite instead a kind of discourse in which they receive the complaint but it gets converted into a commitment that you really stand behind. Once that is identified and made public, there is a possibility that someone is going to act on that commitment.

When you derive commitments out of complaints, they are by definition not fully realized commitments, or they wouldn't have become complaints. That raises the question, "Why aren't they fully realized?" Well, there are many reasons why our commitments are not fully realized, but the one we can do the most about begins with ourselves. There's almost always some hand we have in things being the way they are in our lives. So we invite people to identify the things they are doing, or very often the things they are *not* doing, that keep their commitments from being realized.

HEL: Is that the third form of transformative discourse?

Kegan: Yes. We call it the Discourse of Personal Responsibility—that is, identifying the things we are doing or not doing that actually undermine our own commitments or convictions. This discourse converts us from the experience of ourselves as complaining, disappointed people to people who are not just committed to something but able to own some responsibility for things being the way they are.

How important is this owning of responsibility? School leaders invariably tell us that when people come to them with complaints, they always wish that the other person would be taking more responsibility for their hand in things. Since we are "the other person" for everybody other than ourselves, obviously other people want us to do this, too.

Once we begin to look at the things we generated in the Discourse of Personal Responsibility, we are forced to consider the fact that we are complex people with multiple sets of commitments. If I feel committed to having better faculty meetings, I might identify my own responsibility by recognizing that I have never actually gone to the principal and said, "You know, I am really disappointed and disturbed about the way we spend our time." I've never actually asked for what I wanted.

School leaders invariably tell us they wish complainers would take more responsibility.

Now I can't just vow to change—that is, to start asking for what I want—until I see that my behavior comes out of some other commitment. For example, I may have a commitment to having the principal love me, or a commitment to never hurting another person's feelings, or a commitment to never seeming to be disloyal.

HEL: Is this another level of discourse?

Kegan: Yes. We call it the Discourse of Our Hidden Commitments. These are often very powerful commitments that, in our naive conceptions of ourselves as professionals, we're embarrassed about and think we're supposed to check at the door of work. But there's no way to check them at the door. They always come in.

The Discourse of Our Hidden Commitments asks us to consider that the things we generated in the Discourse of Personal Responsibility are not just professional equivalents of naughtiness that we should stop doing. We can't simply resolve to cut these things out of our act, like making a New Year's resolution. Such resolutions have very little power because they are essentially disrespectful to our own complexity. We must instead identify the underlying commitments that are expressed in the things we are not doing.

This discourse is very revealing. Once I realize that I'm actually committed to never hurting another person's feelings, I'm likely to think, "Oh, this is so true—and I hate that this is true." That puts me in a place where it becomes possible to change.

Looking at these hidden commitments brings us to the fifth form of discourse—the Discourse of Our Big Assumptions. These are the assumptions that, typically, we don't have so much as they have us. We tend not to be aware of them, but they have enormous influence over us.

HEL: If we're not aware of them, how can we begin to talk about them?

Kegan: Let's say you have a hidden commitment never to hurt another person's feelings. We would invite you to finish this sentence: "And I assume that if I ever did hurt another person's feelings, then...." What? What emerges are some pretty powerful and sometimes unwarranted fears: "The other person would be so hurt that she would hate me" or "She'd never trust me again." And then, there it is, right out there where you can actually look at it.

Making those Big Assumptions emerge for an interesting moment doesn't guarantee change. In the absence of a context that preserves my relationship to that assumption—my ability to look at it—it will generally get sucked back into my being identified with it. Like Scarlett O'Hara, "I'll think about it tomorrow." After a while it's just gone again.

So we invite people to form ongoing teams, or even to buddy up, to sustain a relationship to those assumptions in order to be able to begin to explore them, even possibly to alter them. These groups, teams, or even pairs become little "discourse communities," pockets in the organization where new forms of speech are practiced.

HEL: What's the role of conflict in all of this?

Kegan: I've focused on those forms of discourse that can support the kinds of internal work that one would do on oneself. There are still other forms that have to do with making productive use of conflict. We don't believe that you should ignore conflict or that conflict isn't a normal part of organizational life. Far from it. There are forms of discourse for difference that enable us not only to handle managerial problems but actually to use the conflict to enhance transformation.

But that's a pretty high art. We may need to develop a richer relationship to ourselves and our own inner contradictions before we can hope to make the best use of our contradictions with others.

YOUTH AT RISK

Full-Service Schools Could Let Teachers Go Back to Teaching

The "full-service school" is a radical idea for educators overburdened by society's demand that schools "do it all." Joy Dryfoos, formerly of the Alan Guttmacher Institute and now an independent researcher, proposes bringing community, health, and social services into schools where students and their families could receive dental care, welfare services, counseling, and so on, under one roof. Her recommendations are based on a broad national survey of fledgling full-service programs.

The benefits of this "package of interventions," Dryfoos suggests, would be enormous. Families fragmented by poverty could get help for many different needs in one place. Teachers could go back to teaching. And students, served by a variety of social agencies within the school, could go back to learning.

The need, Dryfoos argues, is pressing. She estimates that one in four public school students, or ten million young people, are at high risk of failure. They arrive at school with social, emotional, or health problems that make learning difficult if not impossible. One inner-city principal described his school to Dryfoos as "an underdeveloped country."

See: J. Dryfoos. *Full Service Schools: A Revolution in Health and Social Services for Children, Youth, and Families.* San Francisco: Jossey-Bass Publishers, 1994.

New and Noteworthy

Brief notes on significant recent research in education

REWARDS AND MOTIVATION

The Debate Over Incentives Heats Up

The debate about the effect of rewards and incentives on intrinsic motivation (see "Letting Talent Flow" and "The Case Against Rewards and Praise," *HEL*, March/April 1994) is far from over.

Judy Cameron and W. David Pierce of the University of Alberta, authors of a "meta-analysis" of 96 previous studies, say that extrinsic rewards have no appreciable effect on intrinsic motivation. The only exceptions, they argue, are verbal praise, which significantly *increases* intrinsic motivation, and rewards that are given simply for doing a task (rather than for meeting a performance standard or completing a task), which slightly decrease intrinsic motivation.

But some prominent researchers have challenged Cameron and Pierce's methods. Alfie Kohn, author of the 1993 book *Punished by Rewards,* says their meta-analysis excludes several major studies that show rewards decrease intrinsic motivation when they are withdrawn. And psychologist Mark Lepper of Stanford University believes the analytical technique Cameron and Pierce used is flawed because it allows important positive and negative effects to cancel each other out.

Cameron and Pierce defend both their methods and their conclusions. "The literature in this area has caused a lot of people to be afraid of incentive systems," says Judy Cameron. "Our research suggests that teachers can use incentives without fear that children will lose their intrinsic drive to learn."

A related study by Adele Eskeles Gottfried and colleagues at California State University yields a different conclusion. Their long-term research found that children whose mothers use task-extrinsic motivators such as rewards and punishments to encourage school performance tend to have diminished intrinsic motivation to learn over time.

Stay tuned. The debate on incentives is expected to heat up in forthcoming issues of the *Review of Educational Research* and other journals.

See: J. Cameron and W. D. Pierce. "Reinforcement, Reward, and Intrinsic Motivation: A Meta-Analysis." *Review of Educational Research* 64, no. 3 (Fall 1994): 363-423.

A. Gottfried et al. "Role of Parental Motivational Practices in Children's Academic Intrinsic Motivation and Achievement." *Journal of Educational Psychology* 86, no. 1 (March 1994): 104-113.

CHILDREN WITH DISABILITIES

Print-Rich Environments Recommended for Young Children

Even if young children with disabilities are not ready to read conventionally, they can benefit greatly from exposure to "print-rich environments." So say the directors of Project I.E.P. (Intervention for Early Progress) at the University of Texas at San Antonio.

The researchers studied 24 children age four to six who were identified as having a variety of cognitive, physical, emotional, behavioral, and developmental disabilities. Two-thirds had mild to moderate mental retardation. The children were divided into two self-contained classes—14 in an experimental class and 10 in a control class—for an entire school year. Teachers followed the same curriculum in both classes, but the experimental group also had a well-stocked classroom library, which children used independently several times a day; daily "read-alouds" by adults; and a classroom writing center.

Students worked on compositions in the writing center several times a week; the teacher accepted any scribbles or marks (but not coloring) as writing. The students composed on subjects like holidays, the seasons, and books the teacher had read to them; they were encouraged to share their compositions with each other.

The experimental class showed significantly greater gains than the control group on the Concepts About Print Test, an assessment of basic knowledge about the ways print is used to convey meaning in books. In addition, these students developed increasingly sophisticated book-handling behaviors, more complex and varied composition styles, and a greater tendency to interact with books in their free time over the course of the year. A few students even progressed to actual reading.

Project director David Katims says the findings challenge conventional reading instruction methods for children with disabilities, which often result in their having to wait until later childhood for meaningful experiences with books. "A lot of reading instruction for disabled children still follows a strictly bottom-up approach, breaking reading down to its most separate components," says Katims. "We're suggesting a top-down approach that begins with meaning and background knowledge and works its way down to word decoding."

See: D. Katims. "Emergence of Literacy in Preschool Children with Disabilities." *Learning Disability Quarterly* 17, no. 1 (Winter 1994): 58-69.

TEACHING MATH

Irrelevant Information May Aid in Problem-Solving

It may seem contradictory, but giving math students irrelevant information (and tips on how to spot it) may help them to develop their problem-solving skills. Australian researcher Renae Low and colleagues at La Trobe University in Bundoora studied the teaching of algebraic problem-solving to 208 eleventh-graders. The students who received instruction in "text editing"—that is, identifying whether a word problem contains irrelevant or insufficient information—showed significantly greater gains in problem-solving than other students. Control group students received either traditional instruction emphasizing computation skills or no instruction at all between pre- and post-tests.

The greater improvement among those trained in text editing held whether problems contained irrelevant information or not. Text editing works, the researchers conclude, "by assisting the student to identify the structure of the problem that is to be solved and to process information from the text in ways consistent with the structure the student has identified."

See: R. Low et al. "Solution of Algebraic Word Problems Following Training in Identifying Necessary and Sufficient Information Within Problems." *American Journal of Psychology* 107, no. 3 (Fall 1994): 423-439.

PARTNERSHIPS

Businesspeople and Educators Have a Lot To Learn from Each Other

A diverse Ohio partnership shows what can happen when business and school people begin to see the world through each other's eyes

BY ELIZABETH ARNETT

Educators often respond with suspicion when business shows an interest in public schools. What's the business community's *real* purpose? Do they just want to create an education factory that will turn out willing workers rather than educated citizens?

Businesspeople in turn often harbor negative attitudes toward teachers that can make productive collaboration difficult. Many corporate executives think of teaching as an easy job with short hours, long vacations, and a general lack of standards for performance—unlike the tough, market-driven world of private enterprise. Schools would work better, they think, if only they were run more like businesses.

This climate of distrust makes it hard to get businesspeople and educators to work together on professional development for improving schools. And yet such partnerships, when they do spring up and manage to survive, offer superb opportunities for growth and learning to students and adults alike. I know, because for the past three years I have worked with the Total Quality Education Resource Group of the Ohio Department of Education, a diverse partnership of more than 50 businesspeople, superintendents, principals, teachers, support personnel, vocational educators, state officials, and union representatives. We share professional development activities and link businesses with schools.

No Vacation Days?

The path has not been smooth. All of us have had to examine our assumptions about each other. After several sessions the business partners expressed concern that the teachers and other school staff were not really interested in the project because they did not always show up for meetings. They were surprised to learn that teachers often weren't *allowed* to come. Many districts limited the use of professional leave or could not afford substitute teachers or bus drivers. One executive asked why the teachers could not use vacation days and was truly shocked to learn that teachers have no vacation days. Most of the business representatives had financial support from their companies, but many of the educators bore the expense of participating in the project themselves.

As we began to plan programs, the businesspeople's eyes were opened to the problems school districts face. In business, training is considered work time and is conducted during the work day. In school, professional development opportunities are usually limited to two to four days per year, including district meetings and classroom preparation time at the start of the year. Any additional training usually occurs after school. As one principal put it, "I'm a weary warrior, working with other weary warriors, as we stay after school

STATEMENT OF OWNERSHIP, MANAGEMENT, AND CIRCULATION

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to begin our own learning."

Time was not the only problem new to the business community. Executives were surprised to learn that many educators do not have access to secretarial services, computers for e-mail communication, or telephones in their classrooms. With no money for substitutes, the teachers worried about how they could get involved in long-term programs and still properly supervise their students and maintain continuity in their classes. This, too, was simply not an issue in the business world. When I suggested that the businesses in the group help solve the problem by offering a two- to four-day field experience for students, one executive simply put his head down on the table. "We couldn't do that!" he said, appalled at the thought of having kids in his workplace.

"Why not?" said Bill Hayes from Honda of America, based in Marysville, Ohio. "We're doing it." Hayes and his company, which runs an innovative training and development program for students and teachers, have been instrumental in educating other business partners in the Education Resource Group about what is possible.

Part of this education came via a survey that the group sent to all 600 school superintendents in Ohio. The businesspeople were stunned to learn from

Business leaders were stunned to learn that school administrators did not hold business in high regard.

the more than 200 responses we received that school administrators did not hold the business community in high regard and, indeed, questioned their motives for getting involved in education. Did business want workers who would think creatively and solve problems or simply follow orders on the production line? Why should we trust business's supposed interest in supporting schools when at the same time they push for special deals that exempt them from property taxes? Reading the survey responses, our business partners learned how the Chemical Abstracts Company in Columbus threatened to pack up and leave town rather than give up its tax exemption and contribute to the support of the city's public schools. They began to understand.

Teachers Are Too Nice

Not all the learning was on the business side of the table. Educators often complain that businesspeople don't understand them because they don't have to work with students who are hungry, neglected, or abused, and who vary enormously in motivation and skill. But these problems are not re-

Educators learned that the problems of hunger, neglect, and abuse are not restricted to schools.

stricted to schools. The worlds of education and business work with the same people; there are malnourished and abused employees, and workers in the same setting have different levels of ability and interest. Teachers often complain about the amount of after-school time they spend planning lessons and grading papers. They learned in our group that others take work home, too.

Educators also benefited from the frank observations of business partners like Joe Zitnik, a former AT&T executive from Brecksville, Ohio. Zitnik spent time watching teachers and administrators at work and reported that educators were far too nice. "They're always thanking people, even for the insignificant," he said. "They look insincere. They're not willing to risk offending anyone. They praise students even for mediocre work." He also noted that teachers often complained about the administration but weren't willing to initiate change.

At the same time, Zitnik's appreciation for the complexity of school improvement issues grew. He saw firsthand how certification and work rules make change difficult, how the schedule makes ongoing professional development impossible, how in-service days offer little in the way of stimulation or new experiences, and how special interest groups monopolize the time of schools boards and administrators. "There is no quick, easy fix for all school problems," he concluded.

What resulted from all this learning? An outpouring of support for educators' professional development from the business partners in our group. Tom Baldrick of the Liebert Corporation, Don Botto of Goodyear Tire and Rubber, and Jed Osborn of Ball Metal Container have given their own time and money to provide training programs. Corporations have paid for substitute teachers and sponsored scholarships for school employees to attend conferences. Honda of America sends its own employees into schools to teach and conducts management training for teachers at its manufacturing sites.

Superintendents, principals, teachers, custodians, secretaries, and bus drivers have learned new methods for solving problems and planning work. The business community has learned more about its own planning methods by adapting them to the special circumstances of schools. Perhaps most important, the business partners discovered that there is something educators want even more than money: time and opportunity to learn.

For Further Information

Total Quality Education Resource Group, c/o Ben Lavin, Ohio Department of Education, Ohio Departments Building Room 907, 65 S. Front St., Columbus, OH 54366-0308; 614-644-0787.

Joe Zitnik, JAZ Associates, 4760 Sentinel Dr., Brecksville, OH 44141; 216-526-5666.

Elizabeth Arnett, a former middle and high school math, English, and speech teacher, is now an education reform consultant for the Ohio Education Association. She can be reached at 225 E. Broad St., Box 2550, Columbus, OH 43216; 614-227-3100.

Correction

The opening scenario in the page 1 article on teacher intervention in the November/December 1994 issue was incorrectly described as an actual case from Toledo, Ohio. In fact, it was a composite story based on several cases of intervention in Toledo and Rochester, New York.

MEF Advisory Committee Meeting - February 9, 1995

Mailing has gone out (01.31 / 02.01) to:

Professor James Coleman
Gail Z. Dorph
Professor Seymour Fox
Adam Gamoran
Ellen Goldring
Annette R. Hochstein
Alan D. Hoffmann
Steven Hoffman
Virginia F. Levi
Barry W. Holtz
Nessa Rapoport

I am waiting a reply from Annette re a mailing address for Professor Inbar.

ADH to write covering memo for transmittal of mailing to MLM.

FROM: Sandra L. Blumenfield, 76322,2406
TO: adam, internet:gamoran@ssc.wisc.edu
ellen goldring, internet:goldrieb@ctrvax.vanderbilt.edu
CC: Sandra L. Blumenfield, 76322,2406
Alan Hoffmann, 73321.1220
DATE: 2/7/95 4:19 PM

Re: Copy of: Building the Professions Meeting

Adam and Ellen:

The meetings on the 9th begin at 8:30 a.m.

On the evening of the 8th (from 5:00 p.m. on) there will be a meeting at the Guttman Library re Building the Profession. You are invited to attend whenever you arrive. Dinner will be available.

Regards.

Sandy

Entity CITE

Project MEF ADVISORY COMMITTEE MEETING

Responsible Person/Meeting Coordinator SANDRA L. BLUMENFIELD

Purpose MEET RE MEF

Date(s) of Meeting 02.09.95 Time of Meeting From: 9AM To: 5PM

Meeting City/Airport CAMBRIDGE, MA Arrival Date and Latest Suitable

Arrival Time ______ Departure Date and Earliest Suitable

Departure Time ______ Meeting Agenda Attached? Yes X No ______

Location: Where? HARVARD UNIV. Phone ______

Address CAMBRIDGE, MA Fax ______

Is the location already reserved? Yes X No ______

* ATTENDEES (If more space needed please attach separate sheet)	AIRPORT DEPARTURE CITY	TRAVEL AIR[1]	TRAVEL ~~DRIVE~~ TAXI	ROOMS	MEALS	TOTAL
GAIL DORPH		150	50	120		320
ADAM GAMORAN	MADISON, WI	450	50	120		620
ELLEN GOLDRING	NASHVILLE, TN	773*	50	120		943
ALAN HOFFMANN		150	50	120		320
NESSA RAPOPORT		150	50	120		320
BILL ROBINSON	ATLANTA, GA	587	50	120		757
*773 = COST OF B TO B TICKETS (2)						
ATTENDEE COST		$ 2,260	$ 300	$ 720	$	$[2] 3,280

1 Meeting manager should complete all elements of this form except air fares. This form should then be sent to the Corporate Travel Department who will insert estimated air fares and return the form within 3 working days from the date received.

2 CARRY TOTAL FORWARD TO REVERSE SIDE

If there are other attendees who will cover their own expenses: list on a separate sheet

MEETING/WORKSHOP BUDGET ELEMENTS

ATTENDEE COST: *(Brought forward from front side)* $3,280

DESCRIPTION

MEETING ROOM(S): ______ $______

GROUP MEALS: (CHECK APPROPRIATE BLOCK(S) AND INDICATE THE PER PERSON COST AS WELL AS THE TOTAL)

☐ BREAKFAST $______ (PER PERSON) ☐ LUNCH $______ (PER PERSON) ☐ DINNER $______ (PER PERSON) $______

EQUIPMENT: ______ $______

GROUP REFRESHMENTS: ______ $______

OTHER (SPECIFY): ______ $______

TOTAL MEETING/WORKSHOP BUDGET $3,280

Submitted By	Date	Financial Approval:	Date
S.L. Blumenfield	02.07		
Air Fares Estimated IVI - Bernadina	01.30	Operations Approval:	
Knowledge Center Approval: Alan D. Hoffmann	02.07	Final Approval:	

*Required for budgets allowing less than 30 days notice.

THE
CHARLES
HOTEL

ALAN,
I BELIEVE
ALL FUTURE
MEF/REPORTS SHOULD
LIST HIRSCHORN
(OF COURSE APPROVED
BY M.L.M.)

Harvard Square at One Bennett Street, Cambridge, MA 02138 617-864-1200

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401 4141
4160

12-1

2-2:30

1) Call VICHI
2) [illegible] & Research
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THE CHARLES HOTEL

Harvard Square at One Bennett Street, Cambridge, MA 02138 617-864-1200

SUGGEST

A VIDEO
CONFERENCE

OR TELECOM

MEF Advisory Cttee

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

MEMORANDUM

January 31, 1995

TO: MEF Advisory Committee Members and CIJE Staff

FROM: Adam Gamoran

SUBJECT: February 9th MEF Advisory Committee Meeting

Enclosed are materials in preparation for our MEF Advisory Committee Meeting on February 9th. They include:

1) A summary of our last meeting (August 24, 1994) written in the form of a memo from me to the field researchers. The memo includes a long list of tasks we were to undertake last fall, and I have annotated this list by noting in capital letters the status of each task.

2) The approved MEF Workplan for 1995. The Workplan was based on our August meeting and on follow-up conversations among Alan, Ellen, and myself.

These two documents are important for our February 9th discussions.

In addition, I am enclosing some materials which may serve as additional (but not essential) background:

3) A, B, & C - Three updates on the progress of personnel action plans in the three lead communities. These updates are the final reports from our intensive field monitoring of the lead communities. Each community has also received its report on the "Teaching Force" of its Jewish schools, and you've seen those already.

4) The long-delayed report on mobilization in Atlanta during 1992-93. (This was completed six weeks ago, but I didn't have a chance to send it out.) You may want to skim this report before reading the update for 1994.

slb

C:\CIJE\MEMOS\MEFAVSY.209

MEF Advisory Committee Meeting: Cambridge
February 9, 1995, 9:00am - 4:30pm

Agenda

I. Developing a Module for the Study of Jewish Personnel

A. Preparing the Module for Use in Communities: Draft of Module

B. Data Collection: How do we assure quality? What is CIJE's role? Should an outside group be involved?

C. Data Analysis: Who will analyze data? Private consulting group? A university, researched-based institute (CUNY?)? Bill? How to ensure quality, comparative bases, and opportunities for secondary analyses from other researchers?

D. What is the dissemination plan for the module itself?

E. How can the data be disseminated and accessed for "public" use?

F. How can findings be disseminated and reported? In individual communities? Beyond individual communities? Reports of secondary analyses?

II. Review of experience of the Policy Brief: What went well, what did not go well, where are we in the dissemination plan, etc?

III. Questions about the 1995 Work Plan in light of previous discussion (note that a report on educational leaders is in progress):

A. Should we go ahead with additional policy briefs? If so, what topics are highest priority?

B. Do we still want a single report on personnel that incorporates the various topics (background and training, salaries and benefits, careers) across communities?

C. Evaluation in Lead Communities and elsewhere: Leading Indicators?

D. Research papers and other issues

February 9, 1995

To: Alan
From: Adam and Ellen
CC: Annette, Steve H., Bill
Re: MEF advisory meeting of 2/9/95

I'd like to sum up what I see as the outcomes of today's meeting of the MEF advisory committee. As a way of organizing my thoughts, I've listed the outcomes in terms of the seven "products" in our current work plan. Closure was not reached on any decisions relating to modifications of the work plan, but a number of important issues were fruitfully raised and discussed.

TASKS THAT ARE REASONABLY CLEAR

(1) Paper on "Teachers in Jewish Schools," based on data from the 3 communities covering the topics of work conditions (hours, stability, salaries, benefits), background and training, and careers. Coming into the meeting Ellen and I had substantial doubts as to whether this paper was still warranted. Comments from the staff convinced us it was needed, to show the broad range of information that can be learned from the survey data. We will write the paper following the template of the papers we wrote for the 3 communities. Deadline: August? (It won't take that long to do, but it's not our top priority.)

(3) Report on educational leaders: On this item I think there's clarity -- we should write a report on the characteristics of educational leaders in the 3 communities, and each Lead Community will get a brief report on their results (not broken down by setting. Deadline: April?

(4) Research papers on teacher power and on professional growth: Just as a reminder, here's how these were described in our work plan:

> Our interview studies contain important insights on these topics, but at present they are available only in community-specific reports. During 1995, we will commission research papers on these two topics, based on the interview materials. We propose to disseminate them through a new series of "CIJE Discussion Papers." In addition, they will

be submitted for publication in journals, after review by
the MEF advisory board.

I think we should go ahead with this. The cost to us is not that great ($10,000, plus our time in critiquing drafts), and the potential payoff is high. The papers will be good. Please advise. Possible deadline: June.

TASKS THAT ARE HIGHLY AMBIGUOUS

(2) Additional policy briefs: Possible topics that seemed of greatest interest were educational leaders, and salary and benefits. Despite the high levels of interest, substantial ambiguities remain. Most important, does CIJE want to devote the time and resources needed to edit, produce, and disseminate more policy briefs? Second, will CIJE implementation staff be prepared to provide policy recommendations based on the research results? The answer to this is probably yes on the topic of leaders, but possibly no on the topic of salary and benefits.

Clearly, a brief on salary and benefits would make the biggest splash. A brief on leaders could provide CIJE with an opportunity to disseminate a plan of action for professional development of educational leaders. Probably what we should do is prepare the report on leaders (item 3 above), and then decide together whether we want a policy brief on that topic and if so, what issues to highlight in the brief (e.g., background and training of educational leaders? comparisons to teachers?).

(5) Monitoring the emergence and implementation of Personnel Action Plans and "vision-driven institutions" in communities: I did not understand what our advisory committee asking for. Perhaps a longer conversation would have allowed greater clarity. Were our advisors simply reiterating the decision we made last August, to obtain a sense of the state of these initiatives through a brief series of interviews? Were they asking CIJE implementors to provide us with a list of indicators (e.g., workshops offered or attended, number of educators studying for an MA degree, etc.) which we would then monitor? I'm just not sure. This needs much greater clarity if we are to attempt something useful.

Much of the discussion sounded like a request to return to the sort of intensive qualitative monitoring that we just abandoned, but I'm sure that's not what was intended. Another interpretation is that we have finished monitoring the Lead Community PROCESS, and now it is time to begin monitoring Lead Community OUTCOMES. If this is intended, we'll need to discuss what kind of outcomes should be examined.

This area of our work also includes monitoring the progress of the Goals Project in the Lead Communities. Although we discussed this topic, we are not sure what sort of work is called for. What is the role of MEF in the Goals Project?

One issue that we did not have a chance to mention is that part of your desire to reduce the staff of the MEF project was to reduce the supervisory and administrative burden on Ellen and me, so we could focus more attention on building a research capacity. That should be kept in mind, and the whole issue of the research capacity needs much further discussion.

(6) Module for studying educators in a Jewish community: We discussed three possible approaches for the module: (a) Give the instrumentation to communities, and they're on their own to use it; (b) Work with some national agency e.g. JESNA or CUNY to be the centralized location for providing the surveys and analyzing the results; (c) Create a comprehensive package from start to finish which we or some other agency would help communities carry out themselves.

In the course of our conversation we reached consensus on a few issues. We prefer the second model but aren't sure who's out there to serve as the national agency. We would want the survey to be basically standardized but with some flexibility for a modest amount of local tailoring. We would like to create a data bank to collect the data from all the communities that carry out educator surveys. Overall, however, we aren't sure how to get this done, and we need to think more about it. Deadline: April -- this is our top priority.

(7) Leading Indicators: We did not make any progress in this area. It is still on the table, but what the indicators might be and where they might be obtained remains to be seen.

<u>Issues for Consideration in the Preparation of the Educator Survey Module</u>

MEF ADVISORY COMMITTEE- 2/9/95

We assume there are four important objectives to consider in preparing the educator survey module for use:

1)feasibility of use
2)quality control
3)creating a repository for data/comparability of data
4)accessibility of data for wider use

Focusing on these objectives we should consider a number of options:

1)<u>Communities on Their Own</u>
The instrument is prepared with guidelines for use. These materials are available to anyone who wants them. Communities are on their own to find staff to carry out whatever components of the module they wish to use. Private consultants may be available to carry out this work.

Advantage: Minimal cost to CIJE both financial and in terms of time. Flexibility to the communities to use the module as best meets their needs.

Disadvantage: CIJE has little control over the process.

2)<u>External National Agency Model</u>
In this option, the communities would implement the module in terms of data collection and would forward the collected data to a central "address" such as JESNA or CUNY. This national agency would then analyze the data, write the report, and house the data. The national agency would also be responsible for fielding questions during the data collection stage.

Advantages: The national agency would quickly become experts in this type of work. This could enhance quality control, as well as ensure that the data is compiled in a comparable manner and housed in a central location. This could also enhance the distribution of reports from a more national perspective. Furthermore, this may allow for greater "objectivity" in the process as it is removed from community pressures. Often information coming from outsiders are viewed more favorable with higher status and expertise. There would have to be one major training session by CIJE for the national agency. The national agency could be responsible for periodic reports of cross-community reports as well as advertising the availability of the data for secondary use for dissertations, grant proposals, and other research projects.

Disadvantages: This is a not a "capacity building " model. That is, the communities are not learning to use this type of methodology as an option in their ongoing planning. In addition, it would be important to address whether the communities could modify the instrument to suit their needs and financial/personnel resources? The process and product could be viewed by communities as highly centralized and constraining.

In this model the responsibility on the national agency is very great. Hence the choice of such an agency would be of central concern and their mandate would have to be clear. For example, would the national agency be able to modify the instrument?

Other issues for consideration:
a) Cost
b) Nature of the relationship between the communities and the national agency-such as, level of interaction, time spent with each community, etc.

3) Comprehensive Package Model

In the comprehensive package model, communities can collect/analyze/write reports independently. Accompanying the module (the actual questionnaire/interview instruments and instructions) will be a complete codebook covering all variables, including alternative codings of certain variables. In addition, we would offer a complete SPSS program already set up to receive the questionnaire data. Finally, a guide for analyzing the data and writing a report would be included.

During the data collection stage there will be a "hotline" number where communities can call for clarification and help concerning sampling, questionnaire distribution, data analysis, etc (although the module will have detailed directions).

Communities would be required to provide the raw data and the completed reports to CIJE/or another national agency.

The advantages of this comprehensive approach is:
Communities that want to undertake data analysis themselves will have a complete set of materials to do so. This will also ensure greater comparability of data and quality. This will build the capacity in communities to engage in the self-study process. This process may also help facilitate the development of

Personnel Action Plans by helping communities participate in the process "from data to Personnel Action Plans to evaluating change".

Disadvantage: It is a great deal of work for us to get this type of package prepared. Is it realistic to think that if communities have this comprehensive material they will a) want to use it, and b) know how to use it? This does not really address secondary data analysis, report writing beyond individual communities and issues of the wider research agenda.

Other issues for consideration:
a) Cost to communities (both the cost of the module itself and manpower hours/expertise to implement data analysis, and report writing).
b) The need for periodic training seminars for communities to implement and use the complete module package,
c) Requirements of communities to submit data to a central repository
d) Who will be responsible for the "hotline" to answer questions?
e) Who will be responsible for collecting raw data, compiling it, advertising its availability, at the national level?.