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Subseries 3: Lead Communities, 1988–1997.

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# Memorandum

To: Lauren Azoulai, Chaim Botwinick, Ruth Cohen  
From: Roberta Goodman  
Claire Rottenberg  
Julie Tammivaara  
Adam Gamoran  
Ellen Goldring  
Date: May 26, 1993  
Subject: Reports on the professional lives of Jewish educators

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CC: Annette Hochstein

The purpose of this memorandum is to note the issues we expect to address in the qualitative component of our forthcoming reports on educators' professional lives in Atlanta, Baltimore, and Milwaukee. We would appreciate any feedback you can provide that would help guide the reports.

## Coordination and Schedule of Reports

Each community will receive its own report. The reports will have three components: [1] a qualitative component based on interviews conducted by the field researchers [this component is the focus of the present memorandum], [2] a preliminary account of the survey of educators, and [3] a component that integrates the findings of the first two components and addresses policy questions.

In Milwaukee, both the interviews with educators and the educator survey are being conducted this spring. The first two pieces of the report will be delivered this summer, and the integrated component will come late in the summer. In Atlanta, we have been conducting interviews and will release the qualitative piece this summer. In Baltimore, interviews with educators will not begin until June, so all three components of the report will be delivered in the fall.

## Issues for the Qualitative Component

*A Time to Act* lists six concrete elements of personnel development, and we are taking them as our starting point [see pages 55-63]. The qualitative data [interviews with teachers and educational directors of supplementary, day and pre-schools and informal educators] will not provide all the information needed for policy decisions. Of the six elements, four are most completely addressed in the interviews: training, improvement of salaries and benefits, career track development, and empowerment of teachers. Since recruitment and development of new sources of personnel can only be effectively articulated by talking with or surveying people who are not currently active Jewish educators, these elements will be less well covered. We will offer an analysis of how people are presently being recruited into the field, why they remain, and what circumstances would lead them to consider leaving their current positions.



## Training

A policy outcome for this area would presumably include a plan to strengthen existing and develop new opportunities for training. Such a plan might enlarge training programs, expand in-service education, provide training in specialty areas, for example, family education, and so on. We have spoken with educators about the training they have received, both pre- and in-service, and our reports will describe the extent and nature of their training. We will also document their perceptions of opportunities for training, reasons for taking advantage of or ignoring such opportunities, and their desires for professional development. We shall seek evidence of educators functioning as "reflective practitioners," meaning their professional growth through reflection on their own practices, as well as growth through support from administrators and informal contact with colleagues.

## Salaries and Benefits

Important questions exist about the extent to which salaries and benefits constitute a motivating factor for Jewish educators. It is possible, for example, that financial rewards are more central in some segments of the Jewish educational community than in others. This information can help guide policy. Our reports will address the extent to which educators are motivated by salaries and benefits, as well as administrators' perceptions of the impact of extending benefits and how educators think about issues of part-time versus full-time work.

## Career Track Development

Information we provide on this topic should help inform decisions about developing career tracks for teachers, administrators, and informal educators. Our data will describe educators' perceptions of existing opportunities, the connection between training and opportunities, career changes seen as desirable by educators, and the circumstances that constrain or enable their taking advantage of career opportunities. To what extent do career opportunities motivate Jewish educators? Have they encouraged educators to enter or remain in their profession? Are they a major source of dissatisfaction?

## Empowerment of Educators

A policy outcome in this area would include a plan to assist educators to participate in decision making and to gain access to resources needed to implement their decisions. In our reports, we intend to discuss the nature of educators' perceived autonomy: Do they truly have discretion or are they autonomous only in the sense that no one pays attention to them? We will also describe the types of issues educators say they would like to affect, how educators are judged and would like to be evaluated, how they think others view them, and their self-images. Teacher accountability is another topic that is relevant for this policy area.

Please review the interview protocols and survey along in light of this memorandum. We would like your ideas on additions to them and what policy issues you deem critical but not covered above. The field researcher in your community will be in touch to arrange a time for this feedback.



Julie Tammivaara  
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Baltimore, MD  
21209

410 653 4648

## **Report to the Staff of the CIJE: An Outline**

May 1993

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### **Rationale for focus and emphasis:**

- Content should be responsive to requests of CIJE staff for specific information;
  - Is there a wall-to-wall coalition?
  - What is the federation's role in process, e.g., how much control do they have?
  - Are there intellectual resources in the community at large and are they being tapped?
  - Are there discussions of visions and goals? Who is involved?
  - What is the culture and sentiments of the community?
  - How can CIJE contribute beyond what community could do for self?
  - Does community understand Best Practices project?
  - Is community excited by Best Practices project?
  - Are there different understandings of Lead Community project within the community?
  - Is community clear about how to proceed?
- Content should address current status and illuminate context in a manner that extends the staff's current understanding;
- Analysis should illuminate directions for CIJE-community partnership; and,
- Structure should contribute to dialogue not easily achieved through the written word.

### **Approach and rationale:**

I have chosen a variation of the "critical incident" approach to wherein a single event is selected to illuminate a broad range of ideas. This seems appropriate given the limited time we have with the staff in Cleveland and our wish to engage in a rich conversation about the project. Of the many possibilities, I have chosen the process whereby the Center for the Advancement of Jewish Education was initiated and refined. It will permit me to touch on both how the leadership of Baltimore's lay, professional, and rabbinical Jewish community operate and how they intersect with those further from the center of day-to-day workings of the leadership. While I am fairly confident that what I will report is accurate, I must offer the caveat that the net has not been stretched very far as yet and so this is only a small, if important, piece of the story. I am hopeful that the dialogue that ensues will be suggestive of next steps.



## **The Center for the Advancement of Jewish Education in Baltimore**

### **I. Origin of Strategic Plan which Led to CAJE**

A. Whose idea? In 1986 (?) Mr. Samuel Himmelrich, then president of the Board of the Associated Jewish Charities and Welfare Fund.

B. Rationale? Mr. Himmelrich perceived the need for substantial capital fund raising to rehabilitate and expand Jewish community agencies. He argued for the need to determine what agencies needed re-development, expansion, and strengthened leadership and what endowments were necessary to accomplish this.

C. Situation? Agencies to serve the whole community were in place but they were not operating at maximum efficiency, were not connecting well with those who needed them, and they were underfunded.

D. Response? A committee was formed by the federation leadership to study the needs of the Jewish community in Baltimore. This coincided, more or less, with a change in leadership at The Associated. Initially, the focus was on fiscal matters but the committee determined this focus was too narrow. An outside consultant was engaged to assist in the process of developing a strategic plan that encompassed the whole community.

E. Structure? Three subcommittees were formed to analyze needs of service delivery, relationships among entities, and financing.

F. Product? The document *Building a Stronger Community: Toward the year 2000* was published in June, 1989 and contained numerous recommendations.

G. Implications? The strategic planning process resulted in a recognition that Jewish education and its enhancement was critical to the viability of the Jewish community. The committee linked continuity to education concluding that without continuity, there was little point in strengthening the agencies. Put bluntly, if there were no Jews, there would be no need for agencies to serve them.

H. Next step? Given the prominence of education, the federation formed a Commission on Jewish Education to determine the needs of this sector through a more specific strategic plan. The Board attempted to include representation from the lay, professional and rabbinical domains; they sought ideological inclusiveness as well as functional inclusiveness. At least one adjustment was made in the membership to ensure this representation. (Marshall: Roy Hoffberger told me this but he couldn't remember just what the adjustment was. Do you know?) Individuals whose primary professional role is to teach were not included on either the Strategic Planning Committee or the Commission for Jewish Education.

I. Leadership of the Commission? The chair of the Commission was chosen for his ability to think communally and for his positive rapport with all participants. The rationale for his selection was that he was most likely to accomplish the goal of bringing sometimes warring factions together around the same table and nurture among them a



communal rather than parochial perspective. He also served as a bridge between the executive committee of the federation board and the larger community as he was (and continues to be) active in both.

J. Structure of Commission? The Commission divided into four sub-committees to analyze the needs of day schools, supplemental schools, informal education, and higher education. Three of the reports were completed in early 1992; the fourth was completed in April, 1993. The strategic plan for Jewish education in Baltimore focusing on personnel, programs, and financing will be published in June, 1993.

K. Implications? One of the recommendations of the original strategic plan and a requirement to implement the findings of the second strategic plan was the creation of a single entity to coordinate Jewish education, build partnerships within the community, and be a forum for consensus building. One goal considered in the structure was the integration of delivery, grant review, and the financing elements of the Associated as they related to Jewish education. By accomplishing this goal, The Associated hopes that the directional and functional recommendations can be more carefully coordinated. The Center for the Advancement of Jewish Education will become officially operational 1 July 1993.

L. Brief discussion of organizational chart. Note Chaim's qualifications as both planner and deliverer of direct services.

M. Initiatives originating within the Center.

1. Israel experience: to expand and determine effectiveness of program
2. Teacher specialist program in collaboration with BHU
3. Re-structure day schools
4. Develop collaborative family education program with BJE, JFS, and two congregations, one Reform, one Conservative as partners.

N. Initiatives originating outside the Center.

1. The Reform movement: discuss how outside impetus [national Reform movement leadership] inspired local actions directed toward participating in policy decisions.
2. The Loeb-Bor proposal to restructure supplementary schools: discuss how local non-Commission initiative was developed.

O. A related "outside-inside" issue concerns the different discourses employed by different constituencies within the community. There is an acknowledged federation language, synagogue, language, and very likely several others, not the least of which would be an educator language. Aside from the misunderstandings that can occur when a discourse is not shared, there is symbolic importance to language that is being debated in the community. For example, where the federation would use the term "communal,"



synagogues would speak of a "covenant." Which term is used can become an issue of power.

Summary: Baltimore has a long history of deliberate and thoughtful change. It has a more recent history of careful planning for enhancement of Jewish communal life in general and Jewish education in particular. They require a substantial lead time for planning that leads to implementation. The CIJE commitment to a year-long planning period in lead communities articulates well with Baltimore's approach to change. Planning to this point has been in the hands of the initiated close to the power center of The Associated. As those further removed from this center are brought in, attention must be paid to increasing their sophistication so they can be effective participants. The Associated has established a cross- or non-denominational stance that dictates participation of those who represent a broad range of ideologies including those who are committed to none. coordination, consensus building, partnership are the by words of The Associated with regard to Jewish education. The choice of a consensus model dictates a slower pace for progress than is the case in other models but ownership and commitment are deemed to be stronger in this model. The federation favors initiatives that are cross denominational or generated by multiple groups. By including multiple groups, it is hoped participants will approach change systemically. In selecting participants for key roles in planning and implementation, close attention is paid to personal and symbolic characteristics. They seek the right person for each job.. Changes in structure and direction were result of local recognition and identification of needs, not response to analysis and advice of outside experts. At this point, participants are limited to those associated with the federation. Teachers, parents, students, etc. have not yet been brought into the process. Broader participation will occur after the Center is in place as members of committees serving the planning and direct services, budget and grants review, and resource development pieces of the Center.

## II. Needs of the community

The needs of the Jewish educational community will be specified in the strategic plan that is to be presented in early June. The following are my surmises of needs through conversations with interested parties.

- A. Enhance quality of teaching personnel and administration in all areas of education.
- B. Improve attractiveness of Jewish education as a career. Note: Is hiring less qualified people at lower salaries then having to devote resources to training them over a long period of time cost effective?
- C. Improve programs for students and teachers of Jewish institutions. Note: Best Practices project could contribute here, although there is confusion about what this project is and how it could be integrated into Baltimore's plans.
- D. Increase financial resources for Jewish education. Note: Beginning this year, funds will be solicited specifically for Jewish education. (Marshall: I have heard conflicting ideas on this. Could you explain further your comment to the Reform rabbis and educators about this?)
- E. Improve community understanding of agencies and institutions so clients can be served in greater numbers and more effectively.



F. Participate with other lead communities to secure funding for joint initiatives. One joint proposal for providing training for senior educators (administrators) of day schools has been submitted.

G. Connect with experts, both Jewish and non-Jewish, at national and international levels to assist in achieving goals.

### III. Main Points

Baltimore's leadership represents a broad ideological spectrum. Its commitment to a consensus building model of decision making necessitates a measured pace toward change. Participants are given considerable lead time with regard to committee agendas and much discussion happens prior to formal meetings, i.e., issues tend to be debated informally while formal occasions are reserved for minor clarifications and approval of measures on agendas. The advantages of this approach include the development of a strong sense of ownership by a broad spectrum of people and a greater assurance of success in targeted efforts. This model, however, limits the ability of the community to be quickly responsive to felt needs.

Current general and specific strategic planning has involved lay leaders, federation professionals, and rabbis. Wider participation will be sought after new structure (Center for Advancement of Jewish Education) is in place. Given the "rules" governing group process that have developed over the past six years or so, there is a need to attend to how to communicate these to those not currently participating and to inform larger community about how to bring initiatives to the attention of the planners at the Center. It is unclear at this point the extent to which the representatives of various groups, e. g., the Orthodox, Conservative, and Reform rabbis, have forums wherein they can convey to their fellows what happens in the groups of which they are members.

With respect to the CIJE Lead Community project, there is consensus about what it should mean for Baltimore but this understanding may be at variance with the CIJE's own understanding of its role. Baltimore sees being named a lead community as both an affirmation of its national status as a Jewish community and as an opportunity to be inspired to do more and greater things. They view the CIJE as a catalyst in their efforts to define and enhance Jewish education. There is a perception that the CIJE may see itself in a more directive role.



07:13:17 +0300

Date: Wed, 28 Jul 1993 23:14 CDT

From: <GAMORAN@WISCSSC>

Subject: progress report for CIJE board

To: MANDEL@HUJIVMS

Original\_To: MANDEL

Original\_cc: ELLEN

CIJE Project on Monitoring, Evaluation, and Feedback  
in Lead Communities

Progress Report -- August 1993

How will we know whether the Lead Communities have succeeded in creating better structures and processes for Jewish education?

On what basis will CIJE encourage other cities to emulate the programs developed in Lead Communities? Like any innovation, the Lead Communities Project requires a monitoring, evaluation, and feedback (MEF) component to document its efforts and gauge its success.

By monitoring we mean observing and documenting the planning and implementation of changes. Evaluation entails interpreting information in a way that strengthens and assists each community's efforts to improve Jewish education.

Feedback consists of oral and written responses to community members and to the CIJE.

This progress report describes the activities in which the project has been engaged during 1992-93 and the products it has yielded. The main activities include: (1) Ongoing monitoring and documenting of community planning and institution-building; (2) Development of data-collection instruments; (3) Preparation of reports for CIJE and for community members.

I. Ongoing Monitoring and Feedback To carry out on-site monitoring, we hired three full-time field researchers, one for each community. The field researchers' mandate for 1992-93 centered on three questions:

(1) What is the nature and extent of mobilization of human and financial resources to carry out the reform of Jewish education in the Lead Communities?

(2) What characterizes the professional lives of educators in the Lead Communities?

(3) What are the visions for improving Jewish education in the communities?



The first two questions address the "building blocks" of mobilization and personnel, described in A Time to Act as the essential elements for Lead Communities. The third question raises the issue of goals, to elicit community thinking and to stimulate dialogue about this crucial facet of the reform process.

Monitoring activities involved observations at virtually all project-related meetings within the Lead Communities; analysis of past and current documents related to the structure of Jewish education in the communities; and, especially, numerous interviews with federation professionals, lay leaders, rabbis, and educators in the communities.

Each field researcher worked to establish a "feedback loop" within her own community, whereby pertinent information gathered through observations and interviews could be presented and interpreted for the central actors in the local lead community process. We are providing feedback at regular intervals (generally monthly) and in both oral and written forms, as appropriate to the occasion. An important part of our mission is to try to help community members to view their activities in light of CIJE's design for Lead Communities. For example, we ask questions and provide feedback about the place of personnel development in new and ongoing programs.

We are also providing monthly updates to CIJE, in which we offer fresh perspectives on the process of change in Lead Communities, and on the evolving relationship between CIJE and the communities. For instance, in July 1993 we presented views from the communities on key concepts for CIJE implementation, such as Lead Community Projects, Best Practices, and mobilization. This feedback helps CIJE staff prepare to address community needs.

## II. Instrumentation

### A. Interview Protocols

The MEF team developed a series of interview protocols for use with diverse participants in the communities. These were field tested and then used beginning in late fall, 1992, and over the course of the year. The interview schema for educators were further refined and used more extensively in spring, 1993.

### B. Survey of Educators

We also played a central role in developing an instrument for a survey of educators in Lead Communities. The MEF team worked with members of Lead Communities, and drew on past surveys of Jewish educators used elsewhere. The survey was conducted in Milwaukee in May and June, 1993, and it is scheduled to be implemented in Atlanta and Baltimore in the fall of 1993.



The purpose of the educator survey is to establish baseline information about the characteristics of Jewish educators in each community. The results of the survey will be used for planning in such areas as in-service training needs and recruitment priorities. The survey will be administered (was administered in Milwaukee's case with a response rate of 86%) to all teachers in the Lead Communities. Topics covered in the survey include a profile of past work experience in Jewish and general education, future career plans, perceptions of Jewish education as a career, support and guidance provided to teachers, assessment of staff development opportunities, areas of need for staff development, benefits provided, and so on.

### III. Reports

#### A. Reports on the Professional Lives of Jewish Educators

Each community is to receive three types of reports on educators:

A qualitative component, describing the interview results; a quantitative component, presenting the survey results; and an integrative component, which draws on both the qualitative and quantitative results to focus on policy issues. The schedule for delivering these products is dictated by the specific agendas of each community.

The qualitative reports elaborate on elements of personnel described in A Time to Act, such as recruitment, training, rewards, career tracks, and empowerment. Examples of key findings in reports written so far are the extent of multiple roles played by Jewish educators (e.g., principal and teacher; teacher in two or three different schools), and the tensions inherent in these arrangements; the importance of fortuitous entry into the field of Jewish education, as opposed to pre-planned entry, and the challenges this brings to in-service training; and the diversity of resources available to professional development of Jewish educators, along with the haphazard way these resources are utilized in many institutions.

#### B. Reports on Mobilization and Visions

Information about mobilization and visions has been provided and interpreted for both CIJE staff and members of Lead Communities at regular intervals. In September, we are scheduled to provide a cumulative Year-1 report for each community which will pull together the feedback which was disseminated over the course of the year. These reports will also describe the changes and developments we observed as we monitored the communities over time.

#### IV. Plans for 1993-94



## A. Ongoing Monitoring and Feedback

A central goal for 1993-94 will be the continued monitoring and documenting of changes that occur in the areas of educational personnel, mobilization, and visions. In addition, we are proposing to play a larger role than we initially anticipated in the community self-studies, just as we did with the educators survey. (The educators survey is in fact the first element of the self-study, as described in the Planning Guide.)

In the spring, our field researcher for Atlanta notified us that she would be resigning her position, effective July 31. Although we regret her resignation, we are trying to use it to our advantage by hiring a replacement whose skills fit with the evolving responsibilities of the MEF project. The new field researcher in Atlanta will have expertise in survey research, and will play a lead role in working with the communities to carry out the self-studies.

## B. Outcomes Assessment

Although specific goals for education in lead communities have yet to be defined, it is essential to make the best possible effort to collect preliminary quantitative data to use as a baseline upon which to build.

We are proposing to introduce the diagnostic Hebrew assessment for day schools, created by Professor Elana Shohamy of the Melton Centre in Jerusalem, as a first step towards longitudinal outcomes analysis. The great advantage of the Shohamy method is its value as a diagnostic tool, encouraging schools to use the results of the assessment to guide their own school improvement efforts. The tests have common anchor items, but are mostly designed especially for use in each school.

#### C. Encouraging Reflective Communities

The MEF project will be successful if each Lead Community comes to view evaluation as an essential component of all educational and social service programs. We hope to foster this attitude by counseling reflective practitioners -- educators who are willing to think systematically about their work, and share insights with others -- and by helping to establish evaluation components in all new Lead Community initiatives.



**CIJE Project on Monitoring, Evaluation, and Feedback in Lead Communities**  
**Progress Report — August 1993**

*Dr. Adam Gamoran and Dr. Ellen Goldring*

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We are also providing monthly updates to CIJE, in which we offer fresh perspectives on the process of change in Lead Communities, and on the evolving relationship between CIJE and the communities. For instance, in July 1993 we presented views from the communities on key concepts for CIJE implementation, such as Lead Community Projects, Best Practices, and community mobilization. This feedback helps CIJE staff prepare to address community needs.

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#### IV. *Plans for 1993-94*

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August 19, 1993

To: Seymour, Annette, and Ellen  
From: Adam

The following memo is a revised version of Ellen's and my memo of July 25. It elaborates on monitoring visions by drawing on earlier MEF documents as well as Seymour's letters. It also expands on the monitoring of mobilization by offering examples of key issues. Finally, as per instructions, I cut out almost all of the material about the Shohamy project, saying only that we intend to explore possibilities for measuring cognitive outcomes, and we are focusing first on Hebrew language learning. I suggest that we give this to David Hirschhorn, along with the report to the Board on progress during 1992-93.

I will bring a formatted version to Baltimore. If you want me to make changes before then, please call me no later than 11am on Sunday morning, Aug. 22. I will also bring my laptop, so we can make changes in Baltimore and, if you can get me to a printer, we can reprint it there.

I'm faxing one copy of this to Seymour and two copies to Annette. Annette, would you kindly give one copy to Ellen? Thanks very much.



file - MEF. Gen'l

To: Seymour Fox and Annette Hochstein  
From: Adam Gamoran and Ellen Goldring  
Re: Monitoring, Evaluation, and Feedback Plans  
Date: July 25, 1993

This memo describes our plans for Monitoring, Evaluation and Feedback of Lead Communities for the next year, September 1993-August, 1994.

Our proposal is divided into three areas of work: 1) Ongoing continuation of monitoring and feedback, 2) Conducting the community self-study, and 3) Preparing for assessment of cognitive outcomes.

#### 1) ONGOING MONITORING AND FEEDBACK

In the fall, we will present to the lead communities and CIJE a year one, cumulative report about mobilization and visions. This will follow our cumulative reports about the professional lives of educators. Next year we will continue to monitor the three areas that are central to the MEF plan and the LC effort: visions, mobilization, and professional lives of educators.

Visions. The issue of goals was not addressed in *A Time to Act*. The commission report never specified what changes should occur as a result of improving Jewish education, beyond the most general aim of Jewish continuity. Specifying goals is a challenging enterprise given the diversity within the Jewish community. Nonetheless, the lead communities project cannot advance--and it certainly cannot be evaluated--without a compilation of the desired outcomes.

For purposes of the evaluation project, we will take goals to mean outcomes that are desired within the lead communities. We anticipate uncovering multiple goals, and we expect persons in different segments of the community to hold different and sometimes conflicting preferences. Our aim is not to adjudicate among competing goals, but to uncover and spell out the visions for change that are held across the community. To some extent, goals that emerge in lead communities will be clearly stated by participants. Other goals, however, will be implicit in plans and projects, and the evaluation team will need to tease them out. The evaluation project will consider both short-term and long-term goals.



In this area, the most exciting development during the past year was the initiation of the CIJE Goals Project, an effort to assist the communities in articulating clear and measurable goals. The Goals Project has three elements, each of which will be monitored by the MEF project as they come into contact with the communities:

(a) CIJE has successfully recruited the national denominations (orthodox, conservative, and reform) to provide resources to community institutions (e.g., synagogues, schools, community centers) to help them focus on goals that are specific to their contexts. CIJE staff will facilitate this relationship.

(b) CIJE staff will encourage and help the local lead community commissions to develop vision statements that will describe the overall purpose of the lead community project, and how it expects to be judged.

(c) The Mandel Institute will share with the denominations and the communities its project on alternative conceptions of the Educated Jew.

The first task of the evaluation team will be to document the process through which clear goals become articulated. The second task will be to establish, in consultation with the communities, the measures needed to evaluate progress towards these goals.

Mobilization. According to *A Time to Act*, mobilizing community support for Jewish education is a "building block" of the lead communities project, a condition that is essential to the success of the endeavor. This involves recruiting lay leaders and educating them about the importance of education, as well as increasing the financial resources that are committed to education. The Report quotes one commissioner as saying, "The challenge is that by the year 2000, the vast majority of these community leaders should see education as a burning issue and the rest should at least think it is important. When this is achieved...money will be available to finance fully the massive program envisioned by the Commission (p. 64)."

Each of the communities has shown activity in this area during the first year, although in different ways. Our task for 1993-94 will be to monitor progress in this area, with special attention to key issues that emerged during the previous year. Among these are:

-- Although local commissions contain representatives from diverse constituencies, there are as yet no mechanisms for these representatives to inform and galvanize support in their constituencies. Through what processes does successful diffusion of mobilization and support occur?



-- Educators are playing important roles as representatives of their institutions. What are the means through which the communities effectively encourage educators to further the lead community process through development and implementation of educational innovations?

-- In successful mobilization of lay leadership, what is the interplay between recruiting leaders in support of specific projects (e.g., day school scholarships), as compared with leadership for the total lead community process?

Professional lives of Jewish educators. Enhancing the profession of Jewish education is the second critical building block specified in *A Time to Act*. The Report claims that fundamental improvement in Jewish education is not possible without radical change in areas such as recruitment, training, salaries, career tracks, and empowerment of educators.

During the first year, we established baseline conditions that can serve as standards for comparison in future years. In 1993-94, we will monitor how information is being utilized from the educator survey and professional lives of educator reports, and monitor whether a treatment plan for personnel is being developed. We will learn about the components, scope, and implementation of such plans. In addition, we will continue our work on personnel and professional lives of educators by studying informal educators and adult educators.

Products. The products of this aspect of our monitoring and feedback for next year will include:

- 1) monthly feedback to the lead communities,
- 2) monthly updates to CIJE,
- 3) cumulative year two reports to communities and CIJE about visions, mobilization, and personnel, and
- 4) special topics reports as issues arise (e.g., the changing roles of BJE's).

## **2) COMMUNITY PROFILES (SELF STUDY)**

In response to the pace of implementation in the lead communities, we are willing to take on as our responsibility the self-study. (Since this is no longer a self-study, we are terming this aspect of our work, community profiles.) Building full community profiles will be a two year process. In the first year we propose that we emphasize collecting data from community institutions and agencies to address the question: What is the educational profile of the lead communities? In the second year we propose a needs analysis/market oriented survey of clients and constituencies to determine their views and needs in regard to Jewish education in the lead communities.



In the first year we will focus on the issues set forth in the planning guide concerning the self study (pages 10-12). The MEF team, in conjunction with the CIJE Education Officer, will begin to work with the communities to coordinate and implement this effort. Our goal is to cultivate enthusiasm and secure ownership through the CIJE/LC partnership.

We will also meet with the LC coordinators to get their input into the types of information that will be useful to them as well as learn about the types of information already available. We will collect examples of the types of demographic and/or educational profiles that have been used in other communities. After these consultations we will develop a methodology and reporting form that can be used by all the LCs to report the community profile information. The field researchers will work with the LC coordinators to facilitate the process. We will enter the information into a data base, and provide each community with a profile based on the analyses generated from the information provided. In addition, qualitative data collected through our ongoing monitoring process will be included as integral components of the community profiles.

Products. The outcomes of this aspect of our work will be:

- 1) a methodology and standard reporting form for community profiles,
- 2) analyses and reports of the community profile of each LC, and
- 3) A summary report of the profiles of all three LCs.

In order for us to begin this aspect of our work, CIJE will need to put this project on the agenda so all the LCs know that this will be a major endeavor to begin in the fall. In addition, the question about resources will need to be clarified with the LCs. While some of the information of the community profiles will be readily available, new information will need to be collected and generated. This may incur certain expenses, as well as ancillary fees for mailings, forms, secretarial assistance, data processing, etc.

### **3) COGNITIVE OUTCOMES**

Local data from community profiles is not sufficient for a long-term study of change. Thus, we propose that the third part of the MEF plan for next year begin to plan for and seek appropriate instruments for quantitative assessment of outcome data that are important to the advancement of Jewish education and continuity. This component is crucial in order to begin to monitor trends in the outcomes of Jewish education.

We propose to focus the initial assessment of outcomes on Hebrew language. We have chosen this outcome for two reasons: 1) There is a high level of agreement that Hebrew language is a crucial

outcome of Jewish education, and 2) The greater likelihood of finding appropriate assessment procedures.

One possibility is new work by an expert in the assessment of Hebrew as a second language, Professor Elana Shohamy of the Hebrew University of Jerusalem. An initial consultation with Professor Shohamy was quite promising and we will continue to work on this issue during the coming year.

#### **4) CONCLUSION: FOSTERING EVALUATION-MINDED COMMUNITIES**

As we noted in this year's progress report to the CIJE Board, the MEF project will be successful if each Lead Community comes to view evaluation as an essential component of all educational and social service programs. We hope to foster this attitude by counseling reflective practitioners -- educators who are willing to think systematically about their work, and share insights with others -- and by helping to establish evaluation components in all new Lead Community initiatives.





CIJE Project on Monitoring, Evaluation, and Feedback  
in Lead Communities

Progress Report -- August 1993

How will we know whether the Lead Communities have succeeded in creating better structures and processes for Jewish education? On what basis will CIJE encourage other cities to emulate the programs developed in Lead Communities? Like any innovation, the Lead Communities Project requires a monitoring, evaluation, and feedback (MEF) component to document its efforts and gauge its success.

By monitoring we mean observing and documenting the planning and implementation of changes. Evaluation entails interpreting information in a way that strengthens and assists each community's efforts to improve Jewish education. Feedback consists of oral and written responses to community members and to the CIJE.

This progress report describes the activities in which the project has been engaged during 1992-93 and the products it has yielded. The main activities include: (1) Ongoing monitoring and documenting of community planning and institution-building; (2) Development of data-collection instruments; (3) Preparation of reports for CIJE and for community members.

## **I. Ongoing Monitoring and Feedback**

To carry out on-site monitoring, we hired three full-time field researchers, one for each community. The field researchers' mandate for 1992-93 centered on three questions:

- (1) What is the nature and extent of mobilization of human and financial resources to carry out the reform of Jewish education in the Lead Communities?
- (2) What characterizes the professional lives of educators in the Lead Communities?
- (3) What are the visions for improving Jewish education in the communities?

The first two questions address the "building blocks" of mobilization and personnel, described in A Time to Act as the essential elements for Lead Communities. The third question raises the issue of goals, to elicit community thinking and to stimulate dialogue about this crucial facet of the reform process.

Monitoring activities involved observations at virtually all project-related meetings within the Lead Communities; analysis of



past and current documents related to the structure of Jewish education in the communities; and, especially, numerous interviews with federation professionals, lay leaders, rabbis, and educators in the communities.

Each field researcher worked to establish a "feedback loop" within her own community, whereby pertinent information gathered through observations and interviews could be presented and interpreted for the central actors in the local lead community process. We are providing feedback at regular intervals (generally monthly) and in both oral and written forms, as appropriate to the occasion. An important part of our mission is to try to help community members to view their activities in light of CIJE's design for Lead Communities. For example, we ask questions and provide feedback about the place of personnel development in new and ongoing programs.

We are also providing monthly updates to CIJE, in which we offer fresh perspectives on the process of change in Lead Communities, and on the evolving relationship between CIJE and the communities. For instance, in July 1993 we presented views from the communities on key concepts for CIJE implementation, such as Lead Community Projects, Best Practices, and mobilization. This feedback helps CIJE staff prepare to address community needs.

## II. Instrumentation

### A. Interview Protocols

The MEF team developed a series of interview protocols for use with diverse participants in the communities. These were field tested and then used beginning in late fall, 1992, and over the course of the year. The interview schema for educators were further refined and used more extensively in spring, 1993.

### B. Survey of Educators

We also played a central role in developing an instrument for a survey of educators in Lead Communities. The MEF team worked with members of Lead Communities, and drew on past surveys of Jewish educators used elsewhere. The survey was conducted in Milwaukee in May and June, 1993, and it is scheduled to be implemented in Atlanta and Baltimore in the fall of 1993.

The purpose of the educator survey is to establish baseline information about the characteristics of Jewish educators in each community. The results of the survey will be used for planning in such areas as in-service training needs and recruitment priorities. The survey will be administered (was administered in Milwaukee's case with a response rate of 86%) to all teachers in the Lead Communities. Topics covered in the survey include a profile of past work experience in Jewish and general education, future career plans, perceptions of Jewish education as a career,



support and guidance provided to teachers, assessment of staff development opportunities, areas of need for staff development, benefits provided, and so on.

### III. Reports

#### A. Reports on the Professional Lives of Jewish Educators

Each community is to receive three types of reports on educators: A qualitative component, describing the interview results; a quantitative component, presenting the survey results; and an integrative component, which draws on both the qualitative and quantitative results to focus on policy issues. The schedule for delivering these products is dictated by the specific agendas of each community.

The qualitative reports elaborate on elements of personnel described in A Time to Act, such as recruitment, training, rewards, career tracks, and empowerment. Examples of key findings in reports written so far are the extent of multiple roles played by Jewish educators (e.g., principal and teacher; teacher in two or three different schools), and the tensions inherent in these arrangements; the importance of fortuitous entry into the field of Jewish education, as opposed to pre-planned entry, and the challenges this brings to in-service training; and the diversity of resources available to professional development of Jewish educators, along with the haphazard way these resources are utilized in many institutions.

#### B. Reports on Mobilization and Visions

Information about mobilization and visions has been provided and interpreted for both CIJE staff and members of Lead Communities at regular intervals. In September, we are scheduled to provide a cumulative Year-1 report for each community which will pull together the feedback which was disseminated over the course of the year. These reports will also describe the changes and developments we observed as we monitored the communities over time.

### IV. Plans for 1993-94

#### A. Ongoing Monitoring and Feedback

A central goal for 1993-94 will be the continued monitoring and documenting of changes that occur in the areas of educational personnel, mobilization, and visions. In addition, we are proposing to play a larger role than we initially anticipated in the community self-studies, just as we did with the educators survey. (The educators survey is in fact the first element of the self-study, as described in the Planning Guide.)



In the spring, our field researcher for Atlanta notified us that she would be resigning her position, effective July 31. Although we regret her resignation, we are trying to use it to our advantage by hiring a replacement whose skills fit with the evolving responsibilities of the MEF project. The new field researcher in Atlanta will have expertise in survey research, and will play a lead role in working with the communities to carry out the self-studies.

#### B. Outcomes Assessment

Although specific goals for education in lead communities have yet to be defined, it is essential to make the best possible effort to collect preliminary quantitative data to use as a baseline upon which to build. We are proposing to introduce the diagnostic Hebrew assessment for day schools, created by Professor Elana Shohamy of the Melton Centre in Jerusalem, as a first step towards longitudinal outcomes analysis. The great advantage of the Shohamy method is its value as a diagnostic tool, encouraging schools to use the results of the assessment to guide their own school improvement efforts. The tests have common anchor items, but are mostly designed especially for use in each school.

#### C. Encouraging Reflective Communities

The MEF project will be successful if each Lead Community comes to view evaluation as an essential component of all educational and social service programs. We hope to foster this attitude by counseling reflective practitioners -- educators who are willing to think systematically about their work, and share insights with others -- and by helping to establish evaluation components in all new Lead Community initiatives.



## Memorandum

**To:** Lauren Azoulai, Chaim Botwinick, Ruth Cohen  
**From:** Roberta Goodman  
Claire Rottenberg  
Julie Tammivaara  
Adam Gamoran  
Ellen Goldring  
**Date:** August 27, 1993  
**Subject:** Reports on the professional lives of Jewish educators

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CC: Annette Hochstein

The purpose of this memorandum is to note the issues we expect to address in the qualitative component of our forthcoming reports on educators' professional lives in Atlanta, Baltimore, and Milwaukee. We would appreciate any feedback you can provide that would help guide the reports.

### Coordination and Schedule of Reports

Each community will receive its own report. The reports will have three components: [1] a qualitative component based on interviews conducted by the field researchers [this component is the focus of the present memorandum], [2] a preliminary account of the survey of educators, and [3] a component that integrates the findings of the first two components and addresses policy questions.

In Milwaukee, both the interviews with educators and the educator survey are being conducted this spring. The first two pieces of the report will be delivered this summer, and the integrated component will come late in the summer. In Atlanta, we have been conducting interviews and will release the qualitative piece this summer. In Baltimore, interviews with educators will not begin until June, so all three components of the report will be delivered in the fall.

### Issues for the Qualitative Component

*A Time to Act* lists six concrete elements of personnel development, and we are taking them as our starting point [see pages 55-63]. The qualitative data [interviews with teachers and educational directors of supplementary, day and pre-schools and informal educators] will not provide all the information needed for policy decisions. Of the six elements, four are most completely addressed in the interviews: training, improvement of salaries and benefits, career track development, and empowerment of teachers. Since recruitment and development of new sources of personnel can only be effectively articulated by talking with or surveying people who are not currently active Jewish educators, these elements will be less well covered. We will offer an analysis of how people are presently being recruited into the field, why they remain, and what circumstances would lead them to consider leaving their current positions.



**Training**

A policy outcome for this area would presumably include a plan to strengthen existing and develop new opportunities for training. Such a plan might enlarge training programs, expand in-service education, provide training in specialty areas, for example, family education, and so on. We have spoken with educators about the training they have received, both pre- and in-service, and our reports will describe the extent and nature of their training. We will also document their perceptions of opportunities for training, reasons for taking advantage of or ignoring such opportunities, and their desires for professional development. We shall seek evidence of educators functioning as "reflective practitioners," meaning their professional growth through reflection on their own practices, as well as growth through support from administrators and informal contact with colleagues.

**Salaries and Benefits**

Important questions exist about the extent to which salaries and benefits constitute a motivating factor for Jewish educators. It is possible, for example, that financial rewards are more central in some segments of the Jewish educational community than in others. This information can help guide policy. Our reports will address the extent to which educators are motivated by salaries and benefits, as well as administrators' perceptions of the impact of extending benefits and how educators think about issues of part-time versus full-time work.

**Career Track Development**

Information we provide on this topic should help inform decisions about developing career tracks for teachers, administrators, and informal educators. Our data will describe educators' perceptions of existing opportunities, the connection between training and opportunities, career changes seen as desirable by educators, and the circumstances that constrain or enable their taking advantage of career opportunities. To what extent do career opportunities motivate Jewish educators? Have they encouraged educators to enter or remain in their profession? Are they a major source of dissatisfaction?

**Empowerment of Educators**

A policy outcome in this area would include a plan to assist educators to participate in decision making and to gain access to resources needed to implement their decisions. In our reports, we intend to discuss the nature of educators' perceived autonomy: Do they truly have discretion or are they autonomous only in the sense that no one pays attention to them? We will also describe the types of issues educators say they would like to affect, how educators are judged and would like to be evaluated, how they think others view them, and their self-images. Teacher accountability is another topic that is relevant for this policy area.

Please review the interview protocols and survey along in light of this memorandum. We would like your ideas on additions to them and what policy issues you deem critical but not covered above. The field researcher in your community will be in touch to arrange a time for this feedback.



#### IV. *Plans for 1993-94*

##### A. Ongoing Monitoring and Feedback

A central goal for 1993-94 will be the continued monitoring and documenting of changes that occur in the areas of educational personnel, mobilization, and visions. In addition, we are proposing to play a larger role than we initially anticipated in the community self-studies, just as we did with the educators survey. (The educators survey is in fact the first element of the self-study, as described in the Planning Guide.)

In the spring, our field researcher for Atlanta notified us that she would be resigning her position, effective July 31. Although we regret her resignation, we are trying to use it to our advantage by hiring a replacement whose skills fit with the evolving responsibilities of the MEF project. The new field researcher in Atlanta will have expertise in survey research, and will play a lead role in working with the communities to carry out the self-studies.

##### B. Outcomes Assessment

Although specific goals for education in lead communities have yet to be defined, it is essential to make the best possible effort to collect preliminary quantitative data to use as a baseline upon which to build. We are proposing to introduce the diagnostic Hebrew assessment for day schools, created by Professor Elana Shohamy of the Melton Centre in Jerusalem, as a first step towards longitudinal outcomes analysis. The great advantage of the Shohamy method is its value as a diagnostic tool, encouraging schools to use the results of the assessment to guide their own school improvement efforts. The tests have common anchor items, but are mostly designed especially for use in each school.

##### C. Encouraging Reflective Communities

The MEF project will be successful if each Lead Community comes to view evaluation as an essential component of all educational programs. We hope to foster this attitude by counseling reflective practitioners — educators who are willing to think systematically about their work, and share insights with others — and by helping to establish evaluation components in all new Lead Community initiatives.



## CIJE Project on Monitoring, Evaluation, and Feedback in Lead Communities

Progress Report -- June 1995

How will we know whether the Lead Communities have succeeded in creating better structures and processes for Jewish education? On what basis will CIJE encourage other cities to emulate the programs developed in Lead Communities? Like any innovation, the Lead Communities Project requires a monitoring, evaluation, and feedback (MEF) component to document its efforts and gauge its success.

By monitoring we mean observing and documenting the planning and implementation of changes. Evaluation entails interpreting information in a way that strengthens and assists each community's efforts to improve Jewish education. Feedback consists of oral and written responses to community members and to the CIJE.

This progress report describes the activities of the project from 1992-1995, and the products it has yielded. The main activities have been: (1) Monitoring and documenting of community planning and institution-building; (2) Development, implementation, and further refinement of data-collection instruments; (3) Data analysis and preparation of reports.

### I. Monitoring and Feedback: August 1992 - December 1994

To carry out on-site monitoring, we hired three full-time field researchers, one for each community. The field researchers' mandate centered on three questions:

- (1) What is the nature and extent of mobilization of human and financial resources to carry out the reform of Jewish education in the Lead Communities?
- (2) What characterizes the professional lives of educators in the Lead Communities?
- (3) What are the visions for improving Jewish education in the communities?

The first two questions address the "building blocks" of mobilization and personnel, described in A Time to Act as the essential elements for Lead Communities. The third question raises the issue of goals, to elicit community thinking and to stimulate dialogue about this crucial facet of the reform process.

Monitoring activities involved observations at virtually all project-related meetings within the Lead Communities; analysis of past and current documents related to the structure of Jewish education in the communities; and, especially, numerous interviews with federation professionals, lay leaders, rabbis, and educators in the communities.



Each field researcher worked to establish a "feedback loop" within his/her own community, whereby pertinent information gathered through observations and interviews could be presented and interpreted for the central actors in the local lead community process. We provided feedback in both oral and written forms, as appropriate to the occasion. An important part of our mission was to try to help community members view their activities in light of CIJE's design for Lead Communities. For example, we asked questions and provided feedback about the place of personnel development in new and ongoing programs.

We also provided periodic updates to CIJE, in which we offered fresh perspectives on the process of change in Lead Communities, and on the evolving relationship between CIJE and the communities. For instance, in July 1993 we presented views from the communities on key concepts for CIJE implementation, such as Lead Community Projects, Best Practices, and mobilization. Similarly, in December 1994 we presented an overview and update on changes in personnel planning in the Lead Communities. This feedback helped CIJE staff prepare to address community needs, and to plan new approaches for working with additional communities.

The intensive monitoring and feedback phase of the project concluded in December 1994. We are continuing to provide periodic consultation on evaluation to several communities, but we no longer have a researcher located in each community, and we are no longer carrying out day-to-day monitoring.

## **II. Instrumentation: August 1992 - April 1995**

### **A. Interview Protocols**

The MEF team developed a series of interview protocols for use with diverse participants in the communities. These were field tested and then used beginning in late fall, 1992, and over the course of the year. The interview schema for educators were further refined and used more extensively in spring, 1993.

### **B. Survey of Educators**

We also played a central role in developing an instrument for a survey of educators in Lead Communities. The MEF team worked with members of Lead Communities, and drew on past surveys of Jewish educators used elsewhere. The survey was conducted in Milwaukee in May and June, 1993, and in Atlanta and Baltimore in the fall of 1993.

The purpose of the educator survey was to establish baseline information about the characteristics of Jewish educators in each community. The results of the survey are being used for planning in such areas as in-service training needs and recruitment priorities. The survey was administered to all teachers in the Lead Communities, with an overall response rate of 82%. A parallel form was administered to educational leaders (principals, vice-



principals, directors), with a response rate of 77%. Topics covered in the survey include a profile of past work experience in Jewish and general education, future career plans, perceptions of Jewish education as a career, support and guidance provided to teachers, assessment of staff development opportunities, areas of need for staff development, benefits provided, and so on.

### C. Manual for the CIJE Study of Educators

After the survey and interview results were closely scrutinized, the instruments were further refined and placed together in a manual which may be used by other communities for similar studies. The manual also contains instructions on how to use the instruments. In the long term CIJE plans to establish a national data base on Jewish educators.

## III. Data Analysis and Reports: January 1993 - present

### A. Reports on the Professional Lives of Jewish Educators

Each community received a report on the professional lives of educators, based on the interviews. These reports elaborated on elements of personnel described in A Time to Act, such as recruitment, training, rewards, career tracks, and empowerment. Examples of key findings are the extent of multiple roles played by Jewish educators (e.g., principal and teacher; teacher in two or three different schools), and the tensions inherent in these arrangements; the importance of fortuitous entry into the field of Jewish education, as opposed to pre-planned entry, and the challenges this brings to in-service training; and the diversity of resources available to professional development of Jewish educators, along with the haphazard way these resources are utilized in many institutions.

### B. Analysis of Survey Data

Survey data were extensively analyzed, and a number of important patterns were uncovered. In particular, we noted that the lack of professional preparation among teachers was particularly striking alongside the minimal amount of professional growth activities in which they participate. Another striking finding was the inadequacy of benefits for teachers, even among those who work full time.

### C. Reports on the Teaching Force of Jewish Schools

On the basis of the survey and the interview findings, we prepared a report for each community on the teaching force of its Jewish schools. Key findings included weaknesses in professional background and development, in career opportunities, and in benefits. At the same time, we noted a high level of commitment among many teachers. These findings suggested that the teaching force could be improved through professional growth opportunities such as high-quality in-service.



#### D. Policy Brief for a National Audience

After preparing reports for the three communities, we determined that the most significant national finding was the weaknesses in teacher preparation and in-service, along with their commitment to Jewish education. We prepared a Policy Brief which presented these findings, and CIJE staff added a plan of action as a response to this situation.

The Policy Brief was presented at a session of the General Assembly of the Council of Jewish Federations in November, 1994. The story was widely reported in the Jewish press, with dozens of articles appearing, reaching an audience of several hundred thousand readers, across the country.

#### E. Research Papers

We are preparing reports that address a broad range of issues related to characteristics of teachers and educational leaders, combining data from all three communities. In addition, we have elaborated our work on the professional preparation of teachers, examining conditions that may encourage more attendance at in-service programs. The results of our study suggest that certification requirements for pre-schools and community incentives for supplementary schools and their teachers have been effective mechanisms for elevating the quantity of in-service in which teachers engage.

#### F. CIJE Reports on Mobilization and Visions

Several reports on mobilization, visions, and personnel planning were prepared for CIJE staff. These reports described the changes and developments we observed as we monitored the communities over time.



#### IV. List of Available Products

The following products have been distributed nationally or locally:

##### National Distribution

1. Gamoran, Adam, Ellen B. Goldring, Roberta L. Goodman, Bill Robinson, and Julie Tammivaara. (1994). Policy Brief: Background and Training of Teachers in Jewish Schools. Presented at the General Assembly of the Council of Jewish Federations, Denver.
2. Gamoran, Adam, Ellen B. Goldring, Roberta L. Goodman, Bill Robinson, and Julie Tammivaara. (1995). Manual for the CJE Study of Educators.
3. Gamoran, Adam, Ellen B. Goldring, Bill Robinson, Roberta L. Goodman, and Julie Tammivaara. (1995). Background and Training of Teachers in Jewish Schools: Current Status and Levers for Change. Presented at the annual conference of the Network for Research in Jewish Education, Stanford, CA.
4. Goldring, Ellen B., Adam Gamoran, and Bill Robinson. (Under review). Educational Leaders in Jewish Schools: A Study of Three Communities.
5. Gamoran, Adam, Ellen B. Goldring, and Bill Robinson. (In preparation). Teachers in Jewish Schools: A Study of Three Communities.

##### Local Distribution

6. Goodman, Roberta L. (1993). The Professional Lives of Jewish Educators in Milwaukee.
7. Rottenberg, Claire. (1993). The Professional Life of the Jewish Educator: Atlanta.
8. Tammivaara, Julie. (1994). Professional Lives of Jewish Educators in Baltimore.
9. Gamoran, Adam, Ellen B. Goldring, and Roberta L. Goodman. (1994). The Teaching Force of Milwaukee's Jewish Schools.
10. Gamoran, Adam, Ellen B. Goldring, and Julie Tammivaara. (1994). The Teaching Force of Baltimore's Jewish Schools.
11. Gamoran, Adam, Ellen B. Goldring, and Bill Robinson. (1994). The Teaching Force of Atlanta's Jewish Schools.

(Note: Several reports on community mobilization were also prepared for CJE internal use. In one case, an evaluation report on a local project was prepared for a community.)