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Planning Guide. Drafts, 1992.

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## MEMORANDUM

To: Shulamith Elster  
Seymour Fox  
Sol Greenfield  
Annette Hochstein  
Art Rotman  
John Woocher

From: Jim Meier 

Date: December 29, 1992

Re: Second Draft of Planning Guide

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Enclosed is the second draft of the planning guide for Lead Communities. I would appreciate your comments by Tuesday January 5, if at all possible.

Best wishes for a happy and healthy New Year.

## LEAD COMMUNITIES PLANNING GUIDE

### INTRODUCTION

This set of guidelines has the luxury and the challenge of preaching to the converted. Jewish communities understand and have been engaged in planning for a long time. The lead communities more than many others have made pioneering efforts in planning for Jewish education and continuity. Despite that advantage, all of us are acutely aware of the limitations in the available information and the magnitude of the task of setting out a plan that addresses the continuing Jewish education needs of an entire community.

The purposes of these guidelines are to:

- establish a timeframe for planning process benchmarks so that the first stages of implementation can begin in the Fall of 1993,
- offer approaches, methods, data collection instruments and other tools to use in the planning process, and
- give some measure of uniformity to the planning process that each of the lead communities will engage in during the next months.

Each community will need to tailor these guidelines to its own circumstances. While these guidelines encompass the full scope of the planning process, we acknowledge and emphasize that given the real constraints of time and resource limitations, no community can feasibly carry out every step. Each community must strike a balance between thoroughness and readiness to take action.

As a general principle the object is to build upon the work and the research that has already been done in each community. It usually does not make sense to reinvent the wheel. On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.

## I. FIRST STEPS

### Rationale

First steps refer to preparations, to allow for smooth sailing once the serious work gets underway.

### Major Activity Areas

There are two major areas for attention:

1. Initial mobilization of lay leadership
2. Introducing the idea into the community

Building a "wall-to-wall coalition" is one central objective of the Lead Communities project. A widening net of stakeholder involvement in Jewish education is the instrument for engaging a larger portion of the Jewish community. The mobilization of project leadership is the pivotal starting point for achieving that objective.

The first issue is to identify core leadership to spearhead the effort, while devising a structure that allows a broad cross-section of the community to become actively engaged in the project. The leadership therefore must be carefully selected, and the structure must allow ample opportunity for constituents to obtain a stake in the process. Box 1, Concentric Circles of Leadership, suggests a framework for organizing the project.

### Tasks

1. Identify key leadership, including:
  - . Champion
  - . Lay leaders and major donors
  - . Educators
  - . Rabbis
  - . Professionals
2. Establish the oversight Commission, composed with representation that reflects the broad spectrum of the community. E.g., leadership from:
  - . Federation
  - . Synagogues
  - . Communal agencies and organizations
  - . Schools and programs



### **Box 1: Concentric Circles of Leadership**

One way to organize to reconcile the dual objectives of strong and thoughtful leadership coupled with wide involvement is to develop expanding circles of leadership. For example:

- Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.
- Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.
- Task Forces, to address substantive issues and make recommendations to the full commission, and/or to monitor and evaluate projects once they begin operations. (See below.)
- Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

As a rule, broad representation of diverse constituencies is desirable at every level of organization. However, the top levels of leadership generally should contain a higher percentage of lay representation, while larger numbers of professionals, stakeholders, and agency staff are desirable on the task forces and ad hoc groups.

- Compile packets of background information and distribute to each of the committee members. Box 2 contains a selection of materials that may be useful for this purpose.

### **Box 2: Examples of Background Materials**

- A Time To Act
- Draft of CIJE letter of agreement
- Previous planning documents, particularly on Jewish education or continuity, prepared by your community.
- Summary of most recent Jewish population study for your community.
- CIJE project descriptions
  - . "Best Practices"
  - . Monitoring, Evaluation and Feedback

- Establish a detailed timetable for the project by working backward from the year one end date, as well as forward based on the amount of time work components will require.

Working with the chairperson of the committee, establish a schedule of committee meetings all the way through the first year of planning. Scan major Jewish and national holidays for conflicts. (See Box 3 for an illustrative schedule of steps.)

- Prepare a tentative agenda for the first committee meeting to review with the chair.

### Box 3: Illustrative Planning Framework

<u>Phase</u>	<u>Deliverable</u>	<u>Committee Meeting Subject</u>
1. Start-up	<ul style="list-style-type: none"> <li>(1) • Form committee               <ul style="list-style-type: none"> <li>• Detailed workplan</li> <li>• Agree on mandate</li> </ul> </li> <li>(2) • Form committees</li> </ul>	1a. Major issues in Jewish Education 1b. Review of workplan 1c. Develop "charge" to committees
2. Self-study (Needs Analysis and Profile)	<ul style="list-style-type: none"> <li>• Design scheme</li> <li>• Profile of Jewish education; strengths and weaknesses</li> <li>• Report on findings</li> </ul>	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	<ul style="list-style-type: none"> <li>• Formulate issues</li> </ul>	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	<ul style="list-style-type: none"> <li>• Draft community mission statement</li> </ul>	4. Approve mission/vision statement(s)
5. Strategies and Priorities for Action	<ul style="list-style-type: none"> <li>• List of recommendations for each major client group with priority rankings and priority sequencing</li> </ul>	5. Recommendations on priorities
6. Programs	<ul style="list-style-type: none"> <li>• Draft guidelines</li> <li>• Define program priority areas and new initiatives</li> <li>• Issue call for program proposals</li> </ul>	6. Define program priorities
7. Financial Resource Development	<ul style="list-style-type: none"> <li>• Fundraising plan (e.g., potential donors, strategies, targets, timetable)</li> </ul>	7. Approve and agree on assignments for carrying out plan.
8. First year action plan	<ul style="list-style-type: none"> <li>• Draft budget with resource objectives</li> <li>• Compile summaries of program options</li> <li>• Prepare first year implementation plan</li> </ul>	8a. Set resource objectives (\$) 8b. Select programs for next year 8c. Approve overall implementation plan

### 3. Devise task force structure

It is helpful to organize task forces to address substantive issues and make recommendations to the full commission. Once pilot operations begin, the role of these committees can be modified to monitor and evaluate projects they have initiated.

There are several ways of organizing task forces. Here are some samples:

- Population groups, e.g.:
  - . 1 - 5: early childhood
  - . 6 - 13: elementary school age
  - . 14 - 18: high school/post bar/bat-mitzvah
- Delivery system, e.g.:
  - . Day schools
  - . Supplementary schools
  - . Informal programs
- Functional, the classic "Board of Directors" model, e.g.:
  - . Programs
    - Pilot projects
    - Best practices
  - . Fundraising
  - . Coalition building and marketing/networking
  - . Monitoring and evaluation
  - . Educator's survey
  - . Five year planning
- Programmatic, e.g.:
  - . Personnel
  - . Israel experience
  - . Synagogue programs

Issues to consider in deciding on the most effective approach for organizing include:

- Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.
- Energizing: Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.
- Priorities: Do the topics represent articulated, or likely, priority areas of the community or the commission?

The time and commitment of top lay leaders to serve as chairs, and the depth of capable professionals to service the task forces are factors to consider in deciding on the number of committees.





## II. SELF-STUDY

### Rationale

Good information is the foundation of good decision making. In real life, however, we are often required to take action based on incomplete or imperfect knowledge. In planning a community-wide initiative on Jewish education, this is especially true. The self-study -- learning more about the needs, resources, dynamics, and aspirations of the community -- therefore should be an iterative process.

The first phase is oriented toward the first year action plan, what can be learned that will inform decisions and plans for the 1993-94 year. A by-product of the first phase self study is a clearer definition of what is not known that impacts on the critical choices. Delineation of the gaps in information will help frame the second phase of the self-study, a more thorough investigation which will then proceed over the next year and a half to two years.

The basic purpose of the self-study is to provide a baseline for Commission deliberations and establishment of program priorities. It should provide a common foundation of information for Commission members, level the playing field about assumptions (without which participants in the debate are driven to present opinions and perceptions with the force of fact), enlighten even the most knowledgeable insider, and identify the critical issues and choices the Commission needs to address. It also:

- Identifies unserved and underserved needs for Jewish education, as perceived by groups within the community.
- Helps identify critical issues, or choices that will need to be addressed.
- Provides a common base of information to enlighten decisions on critical issues.
- Clarify<sup>ies</sup> areas of agreement in moving toward establishing a standard of achievement that is acceptable within the community. (?)

Thinking about programs and priorities later in the process should be based on the best available information on educator needs and potential users of the programs in Jewish education.

## Elements of Self-Study

A self study of Jewish education in a lead community will have several elements:

(1) A **needs analysis**

(2) A **profile** of the Jewish education enterprise in the community, including information on (see box 6):

- Student participation
- Personnel characteristics
- Program resources
- Financial resources

## Needs Analysis

A needs analysis identifies unserved and underserved needs for Jewish education, as perceived by groups within the community.

Educators' Survey: The critical importance of personnel in Jewish education dictates that an educators' survey be an early and major component of the needs analysis. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 4 contains ideas for areas to cover in a survey of Jewish education personnel.

The object from the beginning should be the development of an ongoing database about personnel. Given the scope of desired information on the human Jewish education infrastructure, the educator's survey will surely become increasingly sophisticated in subsequent years.

Make sure to involve educators in the design of the survey. Involving people from the field will improve the quality of the data elements selected, help avoid time and resource consuming efforts to obtain unavailable information, help pave the way when it comes time to collect data, and help mobilize educators to support the overall objectives of the commission.

Summarizing, the initial thinking about the educator's survey should take several factors into account:

- **Categories of Information:** What information is desired (see Box 4).
- **Immediate vs. future round data:** Consider ease of availability together with the urgency of need in establishing information sequencing. (See also Box 5, on "Targeting.")

- Database: Allow for growth, in number of information fields as well as in number of records.
- Involve educators.
- Select staff or consultants: In selecting staff, or contracting with a consultant, thoroughly review expectations and workplans.

In view of the importance, complexity, and ongoing nature of this aspect of the lead community effort, it may be advisable to convene a special task force (if such a task force was not built into the organizing framework) to oversee this phase of work.

#### **Box 4: Educators' Survey: Suggested Categories for Inventory**

- Demographic profile (e.g., sex, age, marital status, address)
- Affiliation preference
- Formal education background (e.g., degrees, Jewish and secular licensure, progress toward National Board licensure)
- In-service staff development (particularly, courses and workshops taken in the community)
- Jewish education experience (e.g., years of experience, present and recent positions, full-time and part-time; camp, other summer and other part-time jobs)
- Secular education positions
- Salary history, in Jewish education
- Inventory of formal and informal expertise (e.g., Judaic/Hebrew; age level specializations; teacher training, resource room management, special education; organizing, supervisory or administrative skills). Classifiable as:
  - . Areas of knowledge
  - . Skills
  - . Special talents
- Attitudinal questions (e.g., Jewish education career intentions; job satisfaction and priority concerns)



Client Groups: With respect to other potential client groups, two important issues should be articulated and addressed up-front:

1. Which sub-groups should be studied?
2. What is the appropriate definition of need?

Targeting: While it would be nice, in theory, to understand the complete quilt of needs for Jewish education in the community, in practice this is not realistic in the time available for taking action. The first step, therefore is to select the key groups, in addition to Jewish education professions, to be the focus of research during the first round.

At a minimum, the needs analysis should address the following categories unless they previously have been studied.

- Early childhood
- Ages 5-13
- Post Bar/Bat Mitzvah

Given limited resources, it may make sense to fine tune the targeting still further by looking at specific age groups in particular program areas, for example, Israel programs for teens.

#### **Box 5: Targeting**

Several criteria can be applied in making decisions about what information or which groups to target in the needs analysis.

- **Present knowledge:** How much is already known about the topic or the needs of the group? Has the issue or group previously been studied? Are there significant open questions about what the needs are or how they should be addressed?
- **Priority:** How high a priority is the topic or sub-group with respect to Jewish education? Are the needs of this group for Jewish education a major issue or concern in the community?
- **Feasibility:** What resources of time, effort, money are needed to answer the open questions?

Measures of Need: There are three conceptual ways of considering need:

- a. "Market:" Demand by a defined set of people.
- b. "Standard:" An objective measure of how much people require, or, from the community perspective, what is needed to realize a set of aspirations.
- c. "Receptivity:" What people might respond to, i.e. "buy", but cannot articulate because it is not within their past experience.

In designing the needs analysis, you must decide which measure or measures will be most useful for each subgroup. The criteria for targeting will be helpful in narrowing the measures as well. See also Box 6.

#### **Box 6: Selecting the Measure of Need**

Here are some other considerations to bear in mind in deciding how to measure need:

- **Market** measures are most appropriate when the institutions of the community are relatively powerless to design incentives or exercise leverage to influence individual choices, other than by improving the programs that are offered.
- Conversely, **standards** will be appropriate when community institutions are in a position to offer incentives or exercise leverage, and <sup>ve</sup> have a clear and definable stake in the outcomes of the service area. The caliber and training of professionals is a case in point.
- It is a major undertaking, and perhaps impossible at this time, to define objective standards of how much Jewish education one should have. Similar individuals will vary dramatically in their self-perception of their own need for Jewish education.
- In a needs analysis it is virtually impossible to "measure" **receptivity**, for example to a charismatic champion. It is possible to examine programs that have been successful elsewhere to expand the vision of decision makers, particularly when it comes time to elicit or develop program strategies. In the context of the needs analysis, it is useful to ponder more ambitious alternatives when the expressed needs aspire to a low level.



Measures of Resources: Potential "needs" should be compared to available resources to identify areas of unmet need or "gaps". At the most basic level, a profile of educational resources should include

- data on the numbers of programs, by type, their capacities and actual enrollments
- data on numbers and characteristics of personnel
- utilization of space
- levels of funding, and
- anticipated changes (including resources in the pipeline, such as new programs being planned or anticipated cutbacks).

Measures of Quality: Ideally, a profile of resources should also incorporate assessments of their *quality*. For example, while a community may appear to have enough supplementary school programs, the more crucial issue is how good are they?

The quality of programs is generally measured by assessment of levels of achievement, or measures of performance. The task in Jewish education is substantially more difficult because of the paucity of satisfactory tests of knowledge or achievement, and the complexity of defining a set of generally acceptable standards. For these reasons, in the short run at least it makes sense to rely on "surrogate" measures of performance. For example, attendance and longevity/dropout statistics can be enlightening as indicators of changes in student performance.

If enrollment or attendance is low, or dropoff at age 13 is high, is it because the prospective students are not out there or because the programs are poorly designed or run? Information on the quality and effectiveness of programs is important for identifying strengths and weaknesses of the existing system, for developing strategies for improvement, and ultimately for establishing a baseline against which the impact of future efforts can be measured.

Regardless, the difficulty in measuring quality dictates that in this area especially several iterations of study are necessary. Given the imperative to get underway quickly, we would encourage you to rely on existing information on quality and effectiveness, to the extent possible. Findings and gaps uncovered in one round define the task for the next round.

Generally speaking, three types of measures can be used: (1) input, (2) output or performance, and (3) outcomes. See Box 7 for examples of measures to consider. If you find an absence of information on effectiveness - that, in itself, may suggest that critical issues for the community will be: How should programs be evaluated and against what criteria? What are the characteristics of an excellent educational program? Should there be a process for setting community standards and "accrediting" programs? Should there be an effort to develop community-wide performance indicators and what should they be?

### Box 7: Illustrative Measures of Quality and Effectiveness

- **Measures of inputs** are generally the easiest to obtain. Examples include: per capita expenditures for various age cohorts and programs, teacher/student ratios, average teacher salaries, per cent of teachers with advanced degrees, lay involvement, number of teachers participating in in-service training, etc. Comparisons can be made to provide perspective on where the community stands in relation to other communities and the nation on key indicators.
- Examples of **output or performance measures** include per cent of eligible population participating in formal and informal Jewish education by age group, levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, etc. Methods of collecting this information include sample surveys, questionnaires to program directors, focus groups (for satisfaction), self-studies by schools, alumni surveys, data collected by a central body such as the Board of Jewish Education or Federation, and information collected in recent Jewish population studies.
- **Outcomes** are the most difficult to measure. It is useful to articulate what these might be, even if the data is not available, because it will be helpful in developing the mission statement later on as well as for suggesting lines of future research. Examples of outcome measures would be self-definition and commitment to Jewish identity, values and practices; evidence of transmission of Jewishness to the next generation; affiliation with synagogues, communal organizations, support of Israel and Jewish institutions, etc.

#### Benchmarks/Tasks

1. Design Needs Analysis
  - a. Focus: Select the primary groups to study.
  - b. Measures: Decide on the perspective for measuring the need of each group.
  - c. Develop Concept Scheme: Layout decisions on design for discussion with commission.
2. Collect information: on present participation levels. (See Box 8.)
3. Estimate of community need/demand.
4. Gaps [3 minus 2]: A comparison of the market demand for the present programs will give an estimate of the unmet needs: who are the "unserved" or "underserved" groups in the community from the point of view of adult Jewish education?



### **Box 8: Methods**

Defining Potential Markets: Four types of information can be used to identify potential user groups:

- Available demographic studies and data: enrollment trends, statistics on personnel involved in Jewish education and communal affairs (e.g., full-time, part-time, turnover, longevity ...), enrollment trends in local day and supplemental school programs (as a predictor of future personnel demands).
- Other national and local studies, commission and planning reports: such as the report of the Commission on Jewish Education in North America, local reports of task forces on Jewish continuity, and strategic planning reports that give insights on trends or external forces that will impact on needs. Experience in other cities can be analyzed for possible relevance. Opportunities for program modification or expansion will be identified where substantial unmet needs are documented and where new revenue opportunities appear to exist.
- Discussion or Focus groups: with selected consumer groups (such as day and supplementary school educators, synagogue lay leaders, students) to gain insights on access barriers as well as desires.
- Questionnaires: attitude surveys of selected sectors of the Jewish community: e.g. about student career interests; motivations for participating in specific program; views of institutional or program strengths or weaknesses; perceptions of their own needs or desires for Jewish education; and past and anticipated involvement in Jewish affairs.

Identify a variety of submarkets. Attempt to estimate the size of each submarket, the extent of the need and the competition.

### **Profile**

1. Develop profile of present Jewish education personnel by drawing on the data from the educator's survey.
  - Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood, camps counselors, JCC program staff, other informal education personnel) by institution/program
  - Skills, expertise and background

2. Develop demographic profile of Jewish education needs in the community.
  - Jewish population characteristics: cohort sizes (e.g., early childhood, school age lay leaders, adult education learners, college-age youth, other special groups, like mixed married couples)
3. Analyze program capacities and participation rates (formal and informal programs, by institution/program)
  - Develop a profile of the institutional resources, programs and services presently available in the community. Estimate the capacity of these programs if they are not being fully utilized. (See Box 9 for information to include in a profile.)

**Box 9: Elements of an Institution or Program Profile**

- Students:
  - . Enrollment and graduation trends
  - . Age range
- Educators:
  - . Numbers of full- and part-time
  - . areas of expertise.
- Program components:
  - . Subjects
  - . Degree(s) offered
  - . Activity duration
  - . Methods
  - . Support resources (e.g. library, training) and services
- Finances
  - . Cost per unit of service
  - . Revenue and expenditure trends

## Deliverables

The end product of the needs analysis and profile is a report that describes for each targeted group:

- a. The size of the total potential market.
- b. The size of the likely market, "ripest" for Jewish education.
- c. The characteristics of the parts of that market ripest for Jewish education.
- d. Profile of resources including strengths, weaknesses and major gaps
- e. The factors influencing participation.
- f. The most appropriate methods for meeting the needs of this group.
- g. Who should provide the Jewish education.





### III. CRITICAL ISSUES

#### Rationale

In charting future directions, any community faces a number of important policy choices: i.e., critical issues. Early discussions of the planning committee are the first step in identifying the critical issues. The needs assessment and the in depth analysis of program operations through the profile will provide the information needed to sort out and clarify the fundamental decisions.

#### Deliverables:

- Explicit assumptions
- Formulation of critical issues
- Document summarizing consensus of committee on each critical issue

#### Benchmarks and Methods

1. Assumptions: In designing the best possible system for coordinating and supporting Jewish education, there will be several fundamental "givens" (e.g., that the school in a congregation is the primary educational vehicle for supplementary education). These assumptions should be made explicit to ensure agreement by the commission. Assumptions on which there is not consensus may well become "issues" which the committee must address. See Box 10 for sample assumptions.

#### Box 10: Sample Assumptions

1. The primary instrument of supplementary education is the school within a congregation.
2. The delivery system needs to offer an opportunity for balance (creative tension) between community-wide interests and the interests and perspectives of the religious movements (Reform, Conservative, Reconstructionist and Orthodox).
3. Some type of central entity or entities will be needed to support Jewish education in the community.

2. Critical Issues: The important choices faced by the community in defining the purposes, overall content, and priorities in Jewish education. The planning committee will attempt to reach agreement on what the important questions regarding future investment in Jewish education throughout the community.

It may be useful to classify issues in cascading categories that proceed from more philosophic (i.e., mission) toward more operational (i.e., programmatic or organizational). (See Box 11 for types of issues.)

**Box 11: Classification of Issues**

1. Mission-level issues -- i.e. choices relating to the vision, philosophy and the role of the community in initiating or supporting the emerging needs.
2. Policy issues -- i.e. choices relating to the broad policies relevant to carrying out the community's mission. Some of these choices relate to professional development (e.g. the balance between in-service and pre-service training for pre-school teachers); recruitment (e.g. the balance between new entrants into the field, continuing education, and re-training people from other fields).
3. Standards and Program Issues -- choices relating to the content and level of programming in Jewish education.
4. Resource and organization Issues -- i.e. choices relating to the internal capacity of the community to support mission and policies (e.g. the financial resources, agency roles, possible coordinative and integrative mechanisms).

#### IV. MISSION OR VISION STATEMENT

##### Rationale

The heart of a strategic plan is a mission (or vision) statement, which should project a clear view of the aspirations of the community. The mission statement should project a the self-image of the community in relation to Jewish education. A good mission statement not only suggests what the community wants to accomplish but what it does not seek to accomplish; at the broadest level, it identifies whom it seeks to serve and how.

##### Deliverable

A one paragraph to one page Mission Statement

##### Benchmarks and Methods

Because of its importance, and the difficulty of crafting a good one, the mission statement needs to be the product of substantial analysis and discussion; it should be prepared in the middle of the planning process, not at the beginning.

It should represent the resolution of mission-level critical issues and frame a broad response to the needs assessment. Some parts of the mission statement are not likely to be very controversial; others might be extremely controversial. It is helpful to identify the major options in relation to each critical issue as a framework for the key discussion at which the mission statement gets formulated (see illustration in Box 12 below):

<b>Box 12: Illustrative Mission/Options Chart</b>			
<b>CRITICAL ISSUES</b>	<b>OPTION A</b>	<b>OPTION B</b>	<b>OPTION C</b>
1.0 Community posture on an Israel experience for young people	Community responsibility to insure that every young person has an Israel experience opportunity	Joint community-congregation-family responsibility to insure that every young person has an Israel experience opportunity	Community responsibility to insure that xx% of young people have an Israel experience opportunity
Critical Issue 2.0; etc	Option 2.0A	Option 2.0B	Option 2.0C



## V. SETTING STRATEGIES AND PRIORITIES

### Rationale

The purpose of this part of the planning process is to insure that scarce Jewish communal resources available to Federation and other communal entities for Jewish education are directed to the community's needs and mission. This is accomplished by: selecting effective strategies or policies; setting appropriate priorities.

The policies in the Plan represent resolutions of the critical issues identified above. Resolution of an issue need not strictly adhere to the alternatives that were considered when the issue was defined. It may combine elements of several choices or be an alternative not previously thought of.

Establishing priorities for any community is extremely difficult because of the multiplicity of constituencies and their differing values. A particular educational service may be very important to one group and unimportant to another. The challenge is to develop an approach in which all important views are heard, and then strategies and priorities are developed to insure that the community does not scatter its limited resources.

"Priorities" are seen as judgments about relative importance that inform, not only dollar allocation decisions in the budgeting process, but also decisions about use of non-fiscal resources (such as government relations), and resource development (such as foundation and endowment development).

### Deliverables

- List of policy recommendations for the improvement of Jewish education
- Recommended priority rank and desirable sequence for each recommendation
- List of criteria used to select and rank policy recommendations.

### Benchmarks and Methods

Good methods of priority analysis inform and support human judgment, but do not try to supplant it; formulas or mechanical weighing or scoring methods are typically not useful.

Options are the items that are ranked in priority-setting. In other words, an "option" is something that is a potential recipient or user of a commission resource. An options structure is an organized, systematic listing of all the possible options. The decision as to what to list as an

option is an absolutely crucial one; for once that decision is made, it defines what gets ranked in priority-setting.

A good structure for priority-setting should help decision makers connect broad concerns with specific services or programs -- both those that exist as well as those program or services that do not, but that reflect community concerns.

There are three sources of criteria relevant to setting priorities among options:

- Criteria that are suggested by analyses of community needs. Other things being equal, one would tend to give priority to settings where the total needs are very large (e.g. supplementary schools) or where the gap between existing and needed services is the largest (e.g. in-service education).
- Criteria that derive from the Mission Statement
- Criteria that derive from continental experience in planning for Jewish education

Sample criteria for the selection of effective strategies (policies) and priorities are illustrated in Box 13.

**Box 13: Sample Criteria for Selecting Strategies and Priorities**

- Support professionalization of principals and teachers -- including incentives for higher levels of education.
- Encourage deeper communal involvement and support of Jewish education.
- Maximize effective utilization of resources (minimize duplication).
- Maximize the opportunity to integrate formal and informal educational techniques (e.g., family shabbatonim; camping + study programs; Israel study programs).



## VI. DESIGNING PROGRAMS/PILOT PROJECTS

Expanded, modified, and new programs of course are the most tangible part of the effort to improve Jewish education throughout the community. In the context of a lead community, they are important not just for the promise they hold to improve the enterprise, but also because they can serve as visible demonstrations that help attract larger circles of adherents.

The recent history of Jewish education, as with many other enterprises, contains too many instances of programs being thrown at problems out of a sense of frustration or crisis. Here we hope to shift the emphasis toward the tried, proven and planned. "Best Practices," a CIJE project that is documenting successful programs throughout the continent and organizing them in a variety of categories, should be immensely helpful here. "Best Practice" programs are being classified in six groupings:

- Supplementary schools
- Early childhood Jewish education
- JCCs
- Israel experience
- Day schools
- Jewish camping
- *Campus*

We envision programs being launched in two stages: first a few pilot projects to energize the project; and a subsequent series of programs reflecting the vision and priorities of the commission, which may also be phased to reflect funding flows or other factors.

### Pilot Projects

A community may wish to launch a small number of pilot programs early in the process to gain visibility for its lead community project, to mobilize the community and create a sense of excitement, and to test ideas about which it has a reasonably high level of confidence of success. Programs selected as pilot should be ones which are likely to be consistent with long term directions, or likely to show reasonably dramatic results in a short period of time. Box 14 contains sample criteria for use in selecting pilot projects.

Selecting pilot projects that address high priority infrastructure needs -- namely personnel and community mobilization -- is another way of helping to ensure the viability of the effort. Sample pilot programs are listed in Box 15.

#### **Box 14: Sample Criteria for Pilot Project Selection**

- Improves professional status of teachers, principals, and informal educators
- Promises short-term success and visibility
- Maximizes the opportunity to replicate good results from other communities (e.g., via "Best Practices").
- Promotes multi-agency programming and cooperation
- Maximizes parental involvement
- Strengthens congregations

#### **Box 15: Sample Ideas for Pilot Projects**

##### Personnel

- In-service training for educational leadership -- school principals and JCC program directors.
- In-service training for 2 teachers and 2 informal educators from each institution.
- Summer seminar in Israel for selected educators

##### Community Mobilization

- Leadership training program for congregational and agency board members.
- A series of public forums on "best practices" and/or the community vision.

## Commission Programs

A coherent set of programs should evolve from the commission process, reflecting the vision, strategies, priorities, and recommendations of the commission. A refined set of criteria for program selection should also naturally evolve from those deliberations.

Program Selection: There are several methods for eliciting and selecting program ideas, and working out program implementation details:

- Request for proposal (RFP) process
- Delegate responsibility for specific recommendations to agencies
- Empower task forces as part of commission deliberations.

Box 16 offers suggestions for developing program recommendations which, with some modifications, apply to each of the above selection approaches.

### Box 16: Steps in Developing Program Recommendations

- Brainstorm program ideas
- Adapt commission criteria for evaluating ideas
- Compare with other communities
- Test assumptions: define questions and obtain answers
- Confer with users
- Detail program needs, operations and implementation
- Estimate costs
- Set priorities and phasing among program ideas
- Present priorities and justification to Commission



## VII. FINANCIAL RESOURCE DEVELOPMENT

Develop a short-term and a long-term strategy for obtaining funding to support Commission initiatives. Obvious potential categories include:

- Annual campaign allocations for local services (either increased amounts or reallocations)
- Creation or expansion of a fund for Jewish education
- Major donors
- Foundations (Jewish oriented, and possibly secular ones also)

Naturally, primary attention will focus on obtaining resources for start-up efforts.

We recommend that fundraising for this effort proceed in a planful way, much like the annual campaign:

1. Package most attractive program ideas
  - . Select the most engaging program ideas to showcase
  - . Package or repackage programs to be most appealing
2. Identify potential funders in different categories, e.g.:
  - . Major donors
  - . Medium/large donors
  - . Family foundations
  - . Community foundations
  - . National foundations
3. Match programs to funder interests
4. Identify person/team to make first contact. Consider enlisting Commission members for this role.
5. Follow-up, as appropriate.

## VIII. PREPARE FIRST YEAR ACTION PLAN

- A. Program/Task
- B. Responsibility
- C. Cost and funding
- D. Timetable
- E. Performance Management
- F. Program Evaluation



AH [unclear]  
1/18/93

[draft: guide.05c 12-29-92]

## LEAD COMMUNITIES PLANNING GUIDE

### INTRODUCTION

This set of guidelines has the luxury and the challenge of preaching to the converted. Jewish communities understand and have been engaged in planning for a long time. The lead communities more than many others have made pioneering efforts in planning for Jewish education and continuity. Despite that advantage, all of us are acutely aware of the limitations in the available information and the magnitude of the task of setting out a plan that addresses the ~~continuing Jewish education needs of an entire community~~ challenges of the Lead Communities project.

The purposes of these guidelines are to:

~~provide a framework for planning and implementation of Jewish education and continuity programs in lead communities~~

- offer approaches, methods, data collection instruments and other tools to use in the planning process, and
- give some measure of uniformity to the planning process that each of the lead communities will engage in ~~the process~~

Each community will <sup>of course</sup> need to tailor these guidelines to its own circumstances. ~~Each community will need to tailor these guidelines to its own circumstances.~~

~~These guidelines are intended to provide a framework for planning and implementation of Jewish education and continuity programs in lead communities.~~

As a general principle the object is to build upon the work and the research that has already been done in each community. ~~On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.~~

and use those as a point of departure for the Lead Communities project



# I. FIRST STEPS

## Rationale

First steps refer to preparations, to allow for smooth sailing once the serious work gets underway.

## Major Activity Areas

There are two major areas for attention:

1. Initial mobilization of ~~the~~ leadership (lay and professional)
2. Introducing the idea into the community

Building a "wall-to-wall coalition" ~~is an important initial step~~ of the Lead Communities project. A widening net of stakeholder involvement in Jewish education is <sup>one of our</sup> instruments for engaging a larger portion of the Jewish community. The mobilization of ~~the~~ leadership is a ~~the~~ pivotal ~~element~~ for achieving that objective.

The first issue is to identify <sup>and recruit</sup> core leadership to spearhead the <sup>Lead Communities</sup> effort, while devising a structure that allows a broad cross-section of the community to become actively engaged in the project. The leadership therefore must be carefully selected, and the structure must allow ample opportunity for constituents to obtain a stake in the process. Box 1, Concentric Circles of Leadership, suggests a <sup>possible</sup> framework for organizing the project.

## Tasks

1. Identify <sup>and recruit</sup> key leadership, including:

- (. Champion) is this word appropriate?
- . Lay leaders and major donors
- . Educators
- . Rabbis
- . Professionals

2. Establish the ~~the~~ Commission, composed with representation that <sup>includes top leadership from each of these groups and that</sup> reflects the broad spectrum of the community. E.g., leadership from:

- 1 . Federation
- ~~\_\_\_\_\_~~
- ~~\_\_\_\_\_~~
- ~~\_\_\_\_\_~~
2. Formal educational settings
  - schools
  - synagogues

4. Communal agencies and organizations dealing with education.

**Box 1: Concentric Circles of Leadership**

One way to organize to reconcile the dual objectives of strong and thoughtful leadership coupled with wide involvement is to develop expanding circles of leadership. For example:

- Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.
- Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.
- Task Forces, to address substantive issues and make recommendations to the full commission, and/or to monitor and evaluate projects once they begin operations. (See below.)
- Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

[REDACTED]

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Jan 18, 93 13:38 P.03

- Compile packets of background information and distribute to each of the committee members. Box 2 contains a selection of materials that may be useful for this purpose.

### Box 2: Examples of Background Materials

- A Time To Act

- [REDACTED]
- Previous planning documents, particularly on Jewish education or continuity, prepared by your community.
- Other studies and documents relating to the community's educational system
- Summary of most recent Jewish population study for your community.
- CIJE project descriptions
  - "Best Practices"
  - Monitoring, Evaluation and Feedback

- Goals Project

- Establish a detailed timetable for the project by working backward from the year one end date, as well as forward based on the amount of time work components will require.

Working with the chairperson of the committee, establish a schedule of committee meetings all the way through the first year of planning. Scan major Jewish and national holidays for conflicts. (See Box 3 for an illustrative schedule of steps.)

- Prepare a tentative agenda for the first committee meeting to review with the chair.



### Box 3: Illustrative Planning Framework

<u>Issue</u>	<u>Deliverable</u>	<u>Committee Meeting Subject</u>
1. Organization	<ul style="list-style-type: none"> <li>(1) • Form committee</li> <li>• Detailed workplan</li> <li>• Agree on mandate</li> <li>(2) • Form committees</li> </ul>	1a. Major issues in Jewish Education 1b. Review of workplan 1c. Develop "charge" to committees
2. Self-study (Needs Analysis and Profile)	<ul style="list-style-type: none"> <li>• Design scheme</li> <li>• Profile of Jewish education; strengths and weaknesses</li> <li>• Report on findings</li> </ul>	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	<ul style="list-style-type: none"> <li>• Formulate issues</li> </ul>	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	<ul style="list-style-type: none"> <li>• Draft community mission statement</li> </ul>	4. Approve mission/vision statement(s)
5. Strategies and Priorities for Action	<ul style="list-style-type: none"> <li>• List of recommendations for each major client group with priority rankings and priority sequencing</li> </ul>	5. Recommendations on priorities
6. Programs	<ul style="list-style-type: none"> <li>• Draft guidelines</li> <li>• Define program priority areas and new initiatives</li> <li>• Issue call for program proposals</li> </ul>	6. Define program priorities
7. Financial Resource Development	<ul style="list-style-type: none"> <li>• Fundraising plan (e.g., potential donors, strategies, targets, timetable)</li> </ul>	7. Approve and agree on assignments for carrying out plan
8. First year action plan	<ul style="list-style-type: none"> <li>• Draft budget with resource objectives</li> <li>• Compile summaries of program options</li> <li>• Prepare first year implementation plan</li> </ul>	8a. Set resource objectives (\$) 8b. Select programs for next year 8c. Approve overall implementation plan

see retype!



*Planning*

Box 3: Illustrative Framework

Phase

1. Start up

Deliverable

- (1) Form commission
  - \* Discuss the idea
  - \* Detailed workplan
  - \* Agree on mandate
- (2) Form committees

Committee Meeting Subject

1. ~~Form~~ The Lead Communities
  - a. Main thrusts
    - personnel
    - community mobilization
  - b. Key methods and projects
    - best practices
    - dealing with goals
    - Monitoring evaluation feedback projects
  - c. Structures: CIJE and Lead Community Commission

*Project in 8: one Com.*

2. Start self-study (ongoing)

- \* Design scheme
- \* Survey of educators in the community
- \* Profile of Jewish education: strengths and weaknesses
- \* Report on findings

- \* Design educator's survey
- \* Presentation of profile
- \* Discussion of findings

Critical issues

- \* Formulate issues

3. Resolve strategic issues; make choices

Mission or Vision Statement

- \* Draft community mission statement

4. Approve mission/vision statement

5. Strategies and Priorities for Action

- \* List of recommendations for each major area (personnel) with *community mobilization, Israel Experience* priority rankings and priority sequencing

5. Recommendations on

6. Programs

- \* Draft guidelines
- \* Define program priority areas and new initiatives

6. Define program priorities

7. Financial Resource Development

- \* Fundraising plan (e.g., potential donors, strategies, targets, timetable)

7. Approve and agree on assignments for carrying out plan.

8. First Year Action Plan

- \* Draft budget with resource objectives
- \* Prepare first year implementation plan

- 8a. Select programs for next year
- 8b. Approve overall implementation plan
- 8c. Set resource objectives (8)



### 3. Devise task force structure

It is helpful to organize task forces to address substantive issues and make recommendations to the full commission. Once pilot operations begin, the role of these committees can be modified to monitor and evaluate projects they have initiated.

There are several ways of organizing task forces. Here are some samples:

- Population groups, e.g.:
  - . 1 - 5: early childhood
  - . 6 - 13: elementary school age
  - . 14 - 18: high school/post bar/bat-mitzvah
- Delivery system, e.g.:
  - . Day schools
  - . Supplementary schools
  - . Informal programs
- Functional, the classic "Board of Directors" model, e.g.:
  - . Programs
    - Pilot projects
    - Best practices
  - . Fundraising
  - . Coalition building and marketing/networking
  - . Monitoring and evaluation
  - . Educator's survey
  - . Five year planning
- Programmatic, e.g.:
  - . Personnel
  - . Israel experience
  - . Synagogue programs

Issues to consider in deciding on the most effective approach for organizing include:

- Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.
- Energizing: Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.
- Priorities: Do the topics represent articulated, or likely, priority areas of the community or the commission.

See Retype →



### 3. Devise task force structure

It is helpful to organize task forces to address substantive issues and make recommendations to the full commission. Once pilot operations begin, the role of these committees can be modified to monitor and evaluate projects they have initiated.

There are several ways of organizing task forces. Here are some samples:

- \* Main thrusts of the recommendations of the Commission on Jewish Education in North America
  - \* Personnel
  - \* Community mobilization
  - \* Research/self-study
  - \* ~~\*\*\*~~ Israel Experience
- \* Delivery systems, e.g.:
  - \* Day schools
  - \* Supplementary schools
  - \* Programs in informal settings
- \* Functional, the classic "Board of Directors" model, e.g.:
  - \* Pilot projects
  - \* Best practices
  - \* On the goals of Jewish education
  - \* Monitoring and evaluation
  - \* Fundraising
  - \* Coalition building and marketing/networking
  - \* Educator's survey
  - \* Five year planning

*Setij orientat*

Issues to consider in deciding on the most effective approach for organizing include:

- \* Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.
- \* Energizing: Whether topic areas are likely to generate among potential committee participants and stakeholders.
- \* Priorities: Do the topics represent articulated, or likely, priority areas of the Lead Community Project.

The time and commitment of top lay leaders to serve as chairs, and the depth of capable professionals to service the task forces are factors to consider in deciding on the number of committees.

# 6 and 7

Mandel Institute

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Fax: 972-2-610 951

FAX SENT  
DATE: 20/1/92  
2/872

Facsimile Transmission

To: <u>Dr. Shulamith Elster</u>	Date: <u>January 20, 1992</u>
From: <u>Annette Hochstein</u>	No. Pages: <u>7</u>
Fax Number: _____	

Dear Shulamith,

This is the second installment of the self-study. I am waiting for you to set up the conference call with Jack/Jim. There is some urgency to this as we would like the guide to go to the communities in early February.

Best regards,

*Annette*

PS. Please forward to Jack, Jim and Art. Thanks

*Shulamith*

*This actually  
three 24 -*

*come*

*J*



**Mandel Institute****מכון מנדל**

For the Advanced Study and Development of Jewish Education

January 20, 1993

Mr. Jack Ukeles  
Mr. Jim Heier  
Ukeles Associates

Dear Jack and Jim,

I have attempted to illustrate by amending a significant part of the planning guide how one would move from a general planning document for Jewish education to one that is specifically targeted at the content, the goals, the priorities of the lead communities project. I hope that the thrust of change is clear, and think that it would be useful if you would take it from there and do the same thing for the remaining parts of the document -- from "client groups" and "institutions" in the needs analysis, to "the rationale" (page 18) and the mission statement. You may find some of the CIJE's documents, and before that the Commission documents, useful for this change. In particular, the document on "lead communities at work" and the Commission report may be helpful.

I am, of course, available for any further clarification and hope that this is useful. We would love to have the document in the hands of the community by the end of the month or early in February.

Best regards,

Annette

*This also went to Sheldon.*



# Second Installment

## II. SELF-STUDY

### Rationale

Good information is the foundation of good decision making. In real life, however, we are often required to take action based on incomplete or imperfect knowledge. In planning a community-wide initiative on Jewish education, this is especially true. The self-study -- learning more about the needs, resources, dynamics, and aspirations of the community -- therefore should be an iterative process.

The first phase is oriented toward the first year action plan, what can be learned that will inform decisions and plans for the 1993-94 year. A by-product of the first phase self study is a clearer definition of what is not known that impacts on the critical choices. Delineation of the gaps in information will help frame the second phase of the self-study, a more thorough investigation which will then proceed over the next year and a half to two years.

The basic purpose of the self-study is to provide a baseline for Commission deliberations and establishment of program priorities. It should provide a common foundation of information for Commission members, level the playing field about assumptions (without which participants in the debate are driven to present opinions and perceptions with the force of fact), enlighten even the most knowledgeable insider, and identify the critical issues and choices the Commission needs to address. It also:

- Identifies unserved and underserved needs for Jewish education, as perceived by groups within the community.
- Helps identify critical issues, or choices that will need to be addressed.
- Provides a common base of information to enlighten decisions on critical issues.
- Clarify areas of agreement in moving toward establishing a standard of achievement that is acceptable within the community.

Thinking about programs and priorities later in the process should be based on the best available information on educator needs and potential users of the programs in Jewish education.

see attached pages →



## II. THE SELF-STUDY

### Rationale

Good information is the foundation of good decision making. Yet

"very little research on Jewish education is being carried out in North America. There is a paucity of data about the basic issues and almost no evaluation has been made to assess the quality and impact of programs. Because of this, decisions are taken without the benefit of clear evidence of need, and major resources are invested without sufficient monitoring. We do not know what people want to learn and we seldom know what works in Jewish education. We do not even know much about what students know at different stages in their education. There are not enough standardized achievement tests. There is not sufficiently accurate information on the number of teachers in the system, their qualifications and their salaries."

*A Time to Act*, p. 44

Creating reliable knowledge for decision making about a community's educational system is an exciting and long-term endeavour. Lead communities can offer leadership in this area too, developing means, methods and experience for an ongoing process of self-study. That process would yield over time the quantitative and qualitative data required by leadership to know what exists in the community's Jewish education system, how good it is, what people in the community want, what more is needed and what works better. Hopefully, the tools developed in lead communities will be disseminated for other communities to adopt and adapt.

The initial purpose of the self-study is to provide commission members with an increasingly solid foundation of information, to enlighten even the most knowledgeable insider, and to identify the critical issues and choices the commission may choose to address. It will also help move the community towards establishing standards of achievement that the community aspires to.

The self-study process is an ongoing one and one that cannot be completed within the first year of the project. It is proposed that during the first year of the project the self-study include the following 3 elements:

1. A profile of the Jewish education enterprise in the community, including the following:

- \* Participation (absolute and participation rates);
- \* Inventory of programs, institutions, organizations;
- \* Program resources;
- \* Financial resources.

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2. A needs analysis -- to focus during the first year on personnel-related issues.

3. A research design for years 2-5, in the course of which further in-depth studies might be undertaken and data collection completed. This phase might include qualitative elements such as achievement measures (what do supplementary school students know).

(Add market stuff here)





### Elements of Self-Study

A self study of Jewish education in a lead community will have several elements:

- (1) A needs analysis
- (2) A profile of the Jewish education enterprise in the community, including information on (see box 6):

- Student participation
- Personnel characteristics
- Program resources
- Financial resources

[ I recommend that the profile come first - with the inventory and participation rate - with general demographic data first.   
 whether personnel is redundant in the profile, in light of the study in "needs analysis".

### 2. Needs Analysis

A needs analysis identifies unserved and underserved needs for Jewish education.

~~\_\_\_\_\_~~ and its centrality in the lead Communities project

Given Educators' Survey: The critical importance of personnel in Jewish education, ~~\_\_\_\_\_~~ an educators' survey <sup>survey</sup> be an early and major component of the needs analysis. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 4 contains ~~\_\_\_\_\_~~ <sup>examples</sup> of possible ~~\_\_\_\_\_~~ <sup>for</sup> areas to cover in a survey of Jewish education personnel. A few such comprehensive studies have been undertaken over the past years & may serve as possible examples, to be adapted to the specific needs of your community (e.g. Los Angeles, Miami). ~~\_\_\_\_\_~~ <sup>at the beginning should be the development of an ongoing data base</sup>

~~\_\_\_\_\_~~ <sup>Make sure to involve a social scientist in the design, the implementation, and the analysis of the survey. (You may very likely find an experienced researcher at one of the universities in your area.)</sup> ~~\_\_\_\_\_~~ <sup>Make sure to involve educators in the design of the survey. Involving people from the field will improve the quality of the data elements selected, help avoid time and resource consuming efforts to obtain unavailable information, help pave the way when it comes time to collect data, and help mobilize educators to support the overall objectives of the commission.</sup>

Summarizing, the initial thinking about the educator's survey should take several factors into account:

- Categories of Information: What information is desired (see Box 4).

~~\_\_\_\_\_~~

- The purpose of the survey:
  - to identify in-services training needs.
  - to understand the structure of employment (is most of the work force very much part time, vocational, or avocational, reasonably well paid, or not).



Database: Allow for growth, in number of information fields as well as in number of records.

- Involve educators.
- <sup>someone to lead the survey. Select researcher to insure</sup> ~~expertise~~ <sup>researcher</sup> expertise.
- Select, <sup>thoroughly review</sup> ~~thoroughly review~~ <sup>expectations and workplans.</sup> In selecting staff, or contracting with a ~~researcher~~ researcher.
- In view of the importance, complexity, and ongoing nature of this aspect of the lead community effort, it may be advisable to convene a special task force (if such a task force was not built into the organizing framework) to oversee this phase of work.

**Box 4: Educators' Survey: <sup>Possible</sup> ~~Possible~~ Categories for Inventory (illustrative only)**

- Demographic profile (e.g., sex, age, marital status, address)
- Affiliation ~~profession~~
- <sup>Jewish</sup> ~~education~~ education background (e.g., degrees, Jewish and secular licensure <sup>Courses</sup> ~~courses~~ and programs)
- In-service staff development <sup>(subjects, ~~scope~~ scope, and level)</sup> ~~workshops, seminars, etc.~~
- <sup>work history</sup> ~~work~~ Jewish education <sup>work</sup> experience (e.g., years of experience, present and recent positions, full-time and part-time; <sup>weekly hours</sup> ~~camp~~, other summer and other part-time jobs)
- Secular education positions
- Salary history, in Jewish education
- Inventory of formal and informal expertise (e.g., Judaic/Hebrew; age level specializations; teacher training, resource room management, special education; organizing, supervisory or administrative skills). Classifiable as:
  - Areas of knowledge
  - Skills
  - Special talents
- Attitudinal questions (e.g., Jewish education career intentions; job satisfaction and priority concerns)

MEMORANDUM

To: Arthur Rotman  
Shulamith Elster  
Annette Hochstein  
Sol Greenfield

From: Jim Meier *Jim Meier*

Date: October 5, 1992

Re: Preliminary Outline for LC Planning Manual

Attached is a draft outline for the planning manual for Lead Communities. I look forward to your comments and reactions.

*Com. dev = inst. 28. around expressed need w/ wrap charts.*

*impose from top.*

*1. too structured*

*2. framework includes*

*1. suggest to B. mandate*

*2. At. more focus on*

*(Com. s. personal +*

*Community Support)*

*Com. details*



[draft 10-4-92]

**Lead Communities Planning Guide**  
Preliminary Outline of Contents

I. Analysis of needs

A. Current community demographics:

1. Population characteristics: cohort sizes
2. Jewish educators, by category (e.g. day school principals, day school teachers, supplementary, early childhood ...)
3. Other Jewish education target group sizes (c.g., lay leaders, adult education learners, communal service professionals, college-age youth, other special groups)

B. Present program capacities and participation rates

1. Participation rates (formal and informal programs)
2. Program capacities (directory of resources, enrollment capacities)
  - . Institutions
  - . Programs
3. Estimate of community need/demand
4. Gaps [B3 - B2]

II. Assessment of strengths and weaknesses (What works, what doesn't work)

A. Areas for assessment

1. Institutions and programs
2. Students (levels of attainment)
3. Personnel development
4. Lay involvement and leadership
5. Information (system capabilities)
6. Coordination and collaboration within system
7. Uses of technology

B. Exploratory comparisons (Programs and performance in other places)

III. Strategic issues (confronting and resolving critical choices)

- A. Identify strategic choices
- B. Resolve strategic choices

C. Develop community-wide mission or vision statement(s)

IV. Establishing strategies and priorities

- A. Formulate strategies
- B. Establish priorities
  - 1. Population groups
  - 2. Programs
  - 3. Enabling functions/resources

V. Designing programs (to address priorities)

- A. Initiate program ideas or strategies/preliminary proposals
  - 1. Leadership (lay and professional)
  - 2. Institutions and human resources (including collaboration)
  - 3. Programs (including Israel trips, personnel)
  - 4. Planning and evaluation
  - 5. Financial resources
- B. Select program priorities/phasing

VI. Prepare implementation strategy: multi-year framework, first year action program

- A. Program/Task
- B. Responsibility
- C. Cost and funding
- D. Timetable
- E. Performance Management
- F. Program Evaluation

VII. Next Steps: Implementing the plan

- A. First-year action plan oversight
- B. Mid-course modifications
- C. Prepare second-year action plan

APPENDICES

**General format for each section**

Section heading

Rationale: What the section is about, why it is important, how it relates to the planning process.

Deliverables: Important junctures, or deliverables, and when they must be completed to keep the project on schedule.

Benchmarks: Critical requirements and optional steps/tasks to achieve the benchmarks for the phase.

Methods: "How" to do the task.

Comment Box

For elaborative comments, suggestive hints, or enhancement options.

Point person(s): Recommendations on who should oversee task, and who needs to be involved or have input.

Time guidelines: Approximate minimum/maximum time to set aside to carry out task.

Examples:



LAUNCH OF LEAD COMMITTEES: WORKPLAN  
 [Revised 11/9/92]

TASK	RESPONSIBILITY	KEY MILESTONES	ISSUES/COMMENTS
<b>LETTER OF UNDERSTANDING</b> <ul style="list-style-type: none"> <li>■ Draft #1</li> <li>■ Draft #2</li> <li>■ Negotiation</li> <li>■ Final</li> <li>■ Signing</li> </ul>	UAI (Ukeles) UAI (Ukeles) Elster & Ukeles Rotman as needed Rotman & CIJE Lay Leaders	10/1 & 10/2 10/15 November December	Link to Local Event
<b>PLANNING GUIDELINES</b> <ul style="list-style-type: none"> <li>■ Draft #1</li> <li>■ Draft #2</li> <li>■ Review with community planners</li> <li>■ Final</li> </ul>	UAI (Meier) UAI (Meier) UAI (Meier)	10/15 11/4 11/18 11/23 & 11/24 11/30	Workshop with Planning Directors
<b>PRESENTATION TO COMMISSIONS</b> <ul style="list-style-type: none"> <li>■ GA Forum &amp; Event</li> <li>■ Local events</li> </ul>	Rotman Rotman & CIJE Lay Leaders	11/12 & 11/13	Community-specific events to introduce Project to various publics; Link to Signing
<b>CIJE STAFF COORDIATE</b> <ul style="list-style-type: none"> <li>■ Executive staff</li> <li>■ Program Directors</li> </ul>	Rotman Rotman & Elster		Wkly mtgs (Rotman, Elster, Greenfield & Ukeles)
<b>BEST PRACTICES</b> <ul style="list-style-type: none"> <li>■ Design (inform &amp; access)</li> <li>■ Inform</li> <li>■ Access</li> </ul>	Elster, Holtz & Ukeles Elster & Holtz Elster & Holtz		Need to finalize timetable for deliverables and design methods to inform communities and create points of access

TASK	RESPONSIBILITY	KEY MILESTONES	ISSUES/COMMENTS
<b>COMMUNICATION &amp; PR</b> <ul style="list-style-type: none"> <li>■ Identify Publics</li> <li>■ Communications Plan</li> <li>■ Implement</li> </ul>	Elster ? ?		Use of outside consultant/firm; Assignment of responsibility; Coordination (if any) between Local PR in each community and overall CIJE plan
<b>COMMUNITY CONSULTANTION ("TALENT BANK")</b> <ul style="list-style-type: none"> <li>■ Concept Document</li> <li>■ Assign Responsibility</li> <li>■ Manage System</li> <li>■ Locate Individuals</li> <li>■ Inform Communities</li> <li>■ Access</li> </ul>	Meier Rotman ? ? ? ?	November early November	Design links to Best Practices
<b>CONTINENTAL/COM PLANNING PROCESS</b> <ul style="list-style-type: none"> <li>■ Meet with Planners</li> <li>■ Meet with community lay leaders ("the Seminar")</li> <li>■ Community planning process</li> </ul>	Ukeles & Elster Rotman & CIJE Lay Leaders  Elster & Ukeles	11/23 & 11/24 January  ongoing	For all: agenda, invites, location, dates
<b>LIASION TO NATL RESOURCES</b> <ul style="list-style-type: none"> <li>■ IHJL</li> <li>■ Organizations</li> <li>■ Denominations</li> <li>■ Senior Advisors</li> </ul>	Elster	ongoing   December	Link to community consultation (talent bank); who pays for what
<b>FINANCIAL RESOURCES</b> <ul style="list-style-type: none"> <li>■ Nat'l Foundations</li> <li>■ Local Foundations &amp; individuals</li> </ul>	Naperstek	ongoing	Process for linking local needs definition to foundation interests; funding flow; CIJE as recipient; and CIJE as broker

TASK	RESPONSIBILITY	KEY MILESTONES	ISSUES/COMMENTS
MONITORING, EVAL & FEEDBACK ■ Introduce field researchers to community ■ Dev feedback loop ■ Set terms for first report	Rotman Elster & Rotman Gamoran & Goldring Gamoran & Goldring	ongoing late Sept, early Oct October October	Include baseline portrait





**Lead Communities Planning Guide**  
Preliminary Outline of Contents

I. Analysis of needs

A. Profile of current community demographics:

1. General population characteristics: cohort sizes
2. Other Jewish education sub-group sizes (e.g., early childhood, supplementary school, day school, lay leaders, adult education learners, communal service professionals, college-age youth, other special groups)

B. Profile of present Jewish education personnel

1. Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood ...) by institution/program
2. Skills, expertise and background

C. Program capacities and participation rates (formal and informal programs, by institution/program)

D. Estimate of community need/demand (in categories of A2 & B1)

E. Gaps [D - C]

II. Assessment of strengths and weaknesses (What works, what doesn't work)

A. Areas for assessment

1. Students and programs (e.g. levels of attainment)
2. Personnel
  - by program: quality, assets and limitations
  - professional development programs and opportunities
3. Community support
  - Lay involvement and leadership
  - Coordination and collaboration within system
  - Funding: Amounts and participation rates
  - Participation of stakeholders
4. Other system and planning issues (e.g.):
  - Fundraising and allocations
  - Information (system capabilities)
  - Uses of technology

B. Exploratory comparisons (Programs and performance in other places)

### III. Strategic issues (confronting and resolving critical choices)

- A. Identify strategic choices
- B. Resolve strategic choices
- C. Develop community-wide mission or vision statement(s)

### IV. Establishing strategies and priorities

- A. Formulate strategies
- B. Establish priorities
  - 1. Population groups/program areas
  - 2. Personnel
  - 3. Community support

### V. Designing programs (to address priorities)

- A. Initiate program ideas or strategies/preliminary proposals
  - 1. Leadership (lay and professional) and community support (e.g.):
    - coalition building
    - recruitment (of leadership and community involvement)
  - 2. Programs for personnel
  - 3. Programs (e.g.: Israel trips, innovation)
  - 4. Planning and evaluation
  - 5. Financial resources
- B. Select program priorities/phasing

### VI. Prepare implementation strategy: multi-year framework, first year action program

- A. Program/Task
- B. Responsibility
- C. Cost and funding
- D. Timetable
- E. Performance Management
- F. Program Evaluation

### VII. Next Steps: Implementing the plan

- A. First-year action plan oversight
- B. Mid-course modifications
- C. Prepare second-year action plan

## APPENDICES

## General format for each section

### Section heading

**Rationale:** What the section is about, why it is important, how it relates to the planning process.

**Deliverables:** Important junctures, or deliverables, and when they must be completed to keep the project on schedule.

**Benchmarks:** Critical requirements and optional steps/tasks to achieve the benchmarks for the phase.

**Methods:** "How" to do the task.

### Comment Box

For elaborative comments, suggestive hints, or enhancement options.

**Point person(s):** Recommendations on who should oversee task, and who needs to be involved or have input.

**Time guidelines:** Approximate minimum/maximum time to set aside to carry out task.

**Examples:**



# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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MEMO TO: Lead Community Planning Directors

FROM: Henry L. Zucker, Executive Director.. *HLZ*

DATE: February 15, 1993

SUBJECT: Planning Guide

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Enclosed are several copies of a draft of a planning guide which we hope will be of help to you as you move ahead with planning for the Lead Community project in your community. This is one of several documents the CIJE has prepared to support the work in your community as you initiate the Lead Community process. This is intended as a guide from which you can draw as it is useful to you. It offers approaches, methods, data collection instruments and other tools to use in the planning process while providing some potential for uniformity in the planning process within each Lead Community.

Please use this document to the extent that it is helpful to you. We hope that your feedback and reactions to it as a planning tool can help us to build on this basic document in future versions.

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Date: Mon, 1 MAR 93 10:23:28

From: EKJC68@ERCVAX.EDINBURGH.AC.UK

To: annette@hujivms

Subject: responses to the Planning Guide and Supplementary Schools  
paper

Sender: JANET "EKJC68@UK.AC.EDINBURGH.ERCVAX"  
<EKJC68@ERCVAX.EDINBURGH.AC.UK>

February 28, 1993

Ms. Annette Hochstein  
Mandel Institute of Jerusalem

Dear Annette,

I assume that by the time you read this you will be back from your latest trip to the U.S., and I hope it was a positive and productive visit. This week I received copies of the Planning Guide and the Supplementary Schools paper, and I wanted to offer a few reactions. I think both documents are superb, and my comments mainly address implications for the future rather than suggesting any revisions.

I have two minor questions about the Planning Guide: (1) What is the "goals project" which is mentioned in several places? This sounds like a project with which our work should be

coordinated. (2) On p. 6, mention is made of "CIJE project descriptions." Which document is being used as the project description for the MEF project? Do you want us to prepare something specifically for this audience?

I also have one minor comment: On p. 18-19, the terms "outputs" and "outcomes" are hard to distinguish from one another, although they are given very different meanings here. I think what is meant is "short-term" and "long-term" outcomes, and that would probably be clearer. (A more jargony terminology would be "proximate outcomes" and "long-range outcomes.")

To me, the most important contribution of the planning guide -- aside from the fact that it proposes clear, concrete activities which can be undertaken right away -- is that its approach is systemic rather than piecemeal. As you know, I think this is the major strength of the Lead Communities Project, so it is important that this document reflect the systemic approach. I worry, though, that if and when serious educational planning takes place in the communities, it will occur in isolated programs rather than through ties with broad coalitions, and that the planning taking place in coalitions will not be precise and hard-hitting enough to have significant implications for contact between teachers and students (or counselors and campers, etc.). Part of this concern comes from my reading of the Supplementary School paper from the Best Practices project, which is outstanding in recommending a systemic approach within schools, but could easily be used (or not used) on a school-by-school basis without any wider coordination. At the same time, my limited knowledge of activities which have occurred in the communities thus far does not give me confidence that meetings among persons representing varied constituencies are able to move beyond funding issues, territorial issues, and very abstract goal issues, to attending to more concrete programmatic issues.



What can CIJE do to make sure my fears are not realized, i.e. that the Planning Guide and the work of Best Practices are utilized in a systemic fashion throughout the community? Part of the answer is already in the Planning Guide, in its insistence on a broad coalition, attention to mobilization of many groups, etc. But how can we ensure that these coalitions contemplate significant educational change? To help me think about this I returned to Smith and O'Day's seminal work, "Systemic school reform." Writing about secular education, they advise state-level initiatives to coordinate curriculum, teacher training, and assessment, and to re-examine responsibilities and policies at each level of the educational governance structure. In Jewish education, there is no body with the authority to initiate change as states can for secular education. (Actually, I'm not sure states have the strength to do what Smith and O'Day recommend, but that's another issue!) What is needed is some kind of leverage that would encourage persons and institutions participating in Jewish education to improve curriculum, teacher knowledge and pedagogy, and assessment, and offer a broader range of services, all in a coordinated fashion.

It seems to me that such leverage may be possible through a partnership of CIJE, local federations, and national movements. This coalition may be able to supply the resources -- financial and intellectual -- that would facilitate the development and implementation of coherent programs. To the extent that this group provides resources -- and I am including foundations when I mention federation -- it should be able to demand a high level of coordination of curriculum, staff development, and assessment. Could CIJE broker a partnership among experts from national movements (e.g., education professors at the seminaries) and the local educators within each movement in the lead communities? Recognizing that ideological differences prevent community-wide coordination of education in most areas, it makes most sense to think about coordination within movements, and to

propose that this begin first within the lead communities and ultimately on a national basis.

I hope I've been able to raise some useful questions, even if my suggested responses are too simplistic. As I said above, I think both the Planning Guide and the Supplementary Schools paper are outstanding documents, and I hope as much care will be taken with how they are used as was clearly required for their preparation.

Best,

Adam



# LEAD COMMUNITIES

A PROJECT OF THE  
COUNCIL FOR INITIATIVES  
IN JEWISH EDUCATION

PLANNING GUIDE

**DRAFT**



February, 1993

#### A MESSAGE FROM THE CHAIRMAN

The Council for Initiatives in Jewish Education was established as an outgrowth of the Commission on Jewish Education in North America in November 1990.

CIJE brings together distinguished educators, professionals, lay leaders and philanthropists of the continental Jewish community to energize Jewish education in North America. Visions of what should and can be achieved in the 21st century need to be repeatedly placed before our communities' leadership, and the wherewithal to do so obtained. The CIJE can provide a unique blend of individual and institutional advocacy in North America.

The Lead Communities Project is intended to demonstrate that local communities can significantly improve the effectiveness of Jewish education through careful organizing for the task, with a coalition of community institutions, supplemented with continental institutions and resources.

This planning guide has been prepared to assist the lead communities in their work.



*Morton L. Mandel*

Morton L. Mandel  
Chair

## LEAD COMMUNITIES PLANNING GUIDE

*"Our goal should be to make it possible for every Jewish person, child or adult, to be exposed to the mystery and romance of Jewish history, to the enthralling insights and special sensitivities of Jewish thought, to the sanctity and symbolism of Jewish existence, and to the power and profundity of Jewish faith. As a motto and declaration of hope, we might adapt the dictum that says, 'They searched from Dan to Beer Sheva and did not find an am ha'aretz!' 'Am ha'aretz,' usually understood as an ignoramus, an illiterate, may for our purposes be redefined as one indifferent to Jewish visions and values, untouched by the drama and majesty of Jewish history, unappreciative of the resourcefulness and resilience of the Jewish community, and unconcerned with Jewish destiny. Education, in its broadest sense, will enable young people to confront the secret of Jewish tenacity and existence, the quality of Torah teaching which fascinates and attracts irresistibly. They will then be able, even eager, to find their place in a creative and constructive Jewish community."*

*Professor Isadore Twersky*  
*A Time to Act, p. 19*

*"It is clear that there is a core of deeply committed Jews whose very way of life ensures meaningful Jewish continuity from generation to generation. However, there is a much larger segment of the Jewish population which is finding it increasingly difficult to define its future in terms of Jewish values and behavior. The responsibility for developing Jewish identity and instilling a commitment to Judaism for this population now rests primarily with education."*

*"Recent developments throughout the continent indicate that a climate exists today for bringing about major improvements. However, a massive program will have to be undertaken in order to revitalize Jewish education so that it is capable of performing a pivotal role in the meaningful continuity of the Jewish people."*

A Time to Act, pp. 15 & 16

Atlanta, Baltimore, and Milwaukee have taken on an exciting challenge and an awesome responsibility: to dramatically improve Jewish education throughout their communities, and in the process, to serve as beacons in this endeavor for others in North America. These "lead communities" will provide a leadership function for others in communities throughout the continent. Their purpose is to serve as laboratories in which to discover the educational practices and policies that work best. They will function as the testing places for "best practices" -- exemplary or excellent programs -- in all fields of Jewish education.

## INTRODUCTION

This set of guidelines has the luxury and the challenge of preaching to the converted. Jewish communities understand and have been engaged in planning for a long time. The lead communities more than many others have made pioneering efforts in planning for Jewish education and continuity. Despite that advantage, all of us are acutely aware of the limitations in the available information and the magnitude of the task of setting out a plan that addresses the challenges of the Lead Communities Project.

The purposes of these guidelines are to:

- offer approaches, methods, data collection instruments and other tools to use in the planning process, and
- give some measure of uniformity to the planning process that each of the lead communities will engage in.

Each community will, of course, need to tailor these guidelines to its own circumstances.



As a general principle the object is to build upon the work and the research that has already been done in each community and use those as a point of departure for the Lead Communities Project. On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.

CIJE will serve as a resource and clearinghouse for lead communities as they proceed through the planning process: offering expertise, recommendations on methods or information collection instruments, linkages to national organizations, and a means by which the communities can share their approaches with each other.



## I. FIRST STEPS

*"Fundamental to the success of the lead communities will be the commitment of the community and its key stakeholders to this endeavor. The community must be willing to set high educational standards, raise additional funding for education, involve all or most of its educational institutions in the program, and thereby become a model for the rest of the country. Because the initiative will come from the community itself, this will be a "bottom-up" rather than a "top-down" effort."*

A Time to Act, p. 68

### Rationale

First steps refer to preparations, to allow for smooth sailing once the serious work gets underway.

### Major Activity Areas

There are two major areas for attention:

1. Initial mobilization of leadership (lay, educators, rabbis and professionals)
2. Introducing the idea into the community

Building a "wall-to-wall coalition" of all key actors in the community who have a stake in Jewish education is an important initial step of the Lead Communities Project. A widening net of stakeholder involvement in Jewish education is one of our instruments for engaging a larger portion of the Jewish community. The mobilization of leadership is a pivotal element for achieving that objective.

The first issue is to identify and recruit core leadership to spearhead the lead communities effort, while devising a structure that allows a broad cross-section of the community to become actively engaged in the project. The leadership therefore must be carefully selected (lead communities may want to contact CIJE staff or board members for help in recruiting key people), and the structure must allow ample opportunity for constituents to obtain a stake in the process. Box 1, Concentric Circles of Leadership, suggests a possible framework for organizing the project.

### Tasks

1. Identify and recruit key leadership, including:
  - Chair

- Lay leaders
- Major donors
- Educators
- Rabbis
- Other professionals

2. Establish the Lead Community Commission, composed with representation that includes top leadership from each of these groups and that reflects the broad spectrum of the community. E.g., leadership from:

- Federation
- Formal educational settings
  - schools
  - synagogues
- Informal educational settings
  - JCCs
  - camps
- Communal agencies and organizations dealing with education

**Box 1: Concentric Circles of Leadership**

One way to organize to reconcile the dual objectives of strong and thoughtful leadership coupled with wide involvement is to develop expanding circles of leadership. For example:

- Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.
- Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.
- Task Forces, to address substantive issues and make recommendations to the full Commission, and/or to monitor and evaluate projects once they begin operations (see below.)
- Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

- Compile packets of background information and distribute to each of the committee members. Box 2 contains a selection of materials that may be useful for this purpose.



## **Box 2: Examples of Background Materials**

- A Time To Act
- Previous planning documents, particularly on Jewish education or continuity, prepared by your community.
- Other studies and documents relating to the community's educational systems.
- Summary of most recent Jewish population study for your community.
- CIJE project descriptions
  - "Best Practices"
  - Monitoring, Evaluation and Feedback
  - Goals Project

### **3. Convene Commission**

- Establish a detailed timetable for the project by working backward from the year one end date, as well as forward based on the amount of time work components will require.

Working with the chairperson of the committee, establish a schedule of committee meetings all the way through the first year of planning. Scan major Jewish and national holidays for conflicts. (See Box 3 for an illustrative schedule of steps.)

- Prepare a tentative agenda for the first committee meeting to review with the chair.

### Box 3: Illustrative Planning Framework

<u>Phase</u>	<u>Deliverable</u>	<u>Commission Meeting Subject</u>
1. Start-up	<ul style="list-style-type: none"> <li>• Form Commission               <ul style="list-style-type: none"> <li>- Discuss the idea</li> <li>- Detailed workplan</li> <li>- Agree on mandate</li> </ul> </li> <li>• Form committees</li> </ul>	1a. Review of project key ideas, aims and structures 1b. Review of workplan: Key methods and projects <ul style="list-style-type: none"> <li>- Best Practices</li> <li>- dealing with goals</li> <li>- Monitoring evaluation feedback project</li> </ul> 1c. Develop charge to committees: main thrusts: <ul style="list-style-type: none"> <li>- personnel</li> <li>- community mobilization</li> </ul>
2. Start Self-study (ongoing)	<ul style="list-style-type: none"> <li>• Design scheme</li> <li>• Profile of Jewish education: strengths and weaknesses</li> <li>• Survey of educators in the community</li> <li>• Report on findings</li> </ul>	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	<ul style="list-style-type: none"> <li>• Formulate issues</li> </ul>	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	<ul style="list-style-type: none"> <li>• Draft community mission statement</li> </ul>	4. Approve mission/vision statement
5. Strategies and Priorities for Action	<ul style="list-style-type: none"> <li>• List of recommendations for each major area (personnel, community mobilization, Israel experience) with priority rankings and priority sequencing</li> </ul>	5. Recommendations on priorities
6. Programs	<ul style="list-style-type: none"> <li>• Confer with CIJE, Best Practices</li> <li>• Draft guidelines</li> <li>• Define program priority areas and new initiatives</li> <li>• Issue call for program implementation proposals</li> </ul>	6. Define program priorities
7. Resource Development	<ul style="list-style-type: none"> <li>• Fundraising plan (e.g., potential donors, strategies, targets, CIJE assistance, timetable)</li> </ul>	7. Approve and agree on assignments for carrying out plan.
8. Subsequent year action plan	<ul style="list-style-type: none"> <li>• Draft budget with resource objectives</li> <li>• Compile summaries of program options</li> <li>• Prepare first year implementation plan</li> </ul>	8a. Select programs for next year 8b. Approve overall implementation plan 8c. Set resources objectives (\$)

#### 4. Devise task force structure

It is helpful to organize task forces to address substantive issues and make recommendations to the full commission. Once pilot operations begin, the role of these committees can be modified to monitor and evaluate projects they have initiated.

There are several ways of organizing task forces. Here are some samples:

- Main thrusts of the recommendations of the Commission on Jewish Education in North America
  - personnel
  - community mobilization
  - research/self-study
  - Israel experience
- Delivery settings, e.g.:
  - day schools
  - supplementary schools
  - programs in informal settings
- Functional, the classic "Board of Directors" model, e.g.:
  - pilot projects
  - best practices
  - goals/visions of Jewish education
  - monitoring and evaluation
  - fundraising
  - coalition building and marketing/networking
  - educator's survey
  - five year planning

Issues to consider in deciding on the most effective approach for organizing include:

- **Energizing:** Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.
- **Priorities:** Do the topics represent articulated, or likely, priority areas of the Lead Communities Project.
- **Content expertise:** How do staff knowledge and other resource experts relate to the potential topics? Do any of the organizing approaches make better use of available human resources?
- **Bridge building:** Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.



The time and commitment of top lay leaders to serve as chairs, and the depth of capable professionals to service the task forces are factors to consider in deciding on the number of committees.



## II. SELF-STUDY

*"[An important step in mobilizing is...] to review the current state of Jewish education in its various aspects. This will provide the basis for analyzing the problems, considering the achievements and shortcomings, and determining where the most promising opportunities for improvement might lie."*

A Time to Act, p. 31

### Rationale

Obtaining reliable information about something as complex as a community's educational system is an ongoing endeavor. Its payoffs are immediate, long-term, and continuous: as the community learns more about itself, its decision making will improve. Over time, the process will yield better and better quantitative and qualitative data about what exists in the community's Jewish education system, how good it is, what people in the community want, what more is needed and what works better.

Lead communities can offer leadership in this area too, developing means, methods and experience for an ongoing process of serious self-study. Hopefully, the tools developed in lead communities will be disseminated for other communities to adopt and adapt. CIJE is a resource for designing and carrying out the self-study, as well as for disseminating findings and new products.

The initial purpose of the self-study is to provide commission members with an increasingly solid foundation of information, to enlighten even the most knowledgeable insider, and to identify the critical issues and choices the commission may choose to address. It will also help move the community towards establishing standards of achievement that the community aspires to.

The self-study process is an ongoing one; it will not be completed within the first year of the project. It is proposed that during the first year of the project the self-study include the following 3 elements:

1. A *profile* of the Jewish education enterprise in the community, including the following:
  - Participation (absolute numbers, rates and trends)
  - Inventory of personnel, programs, institutions, organizations
  - Program resources
  - Financial resources
  
2. A *needs analysis* to focus during the first year on personnel-related issues, a central part of which will be an educator's survey.

3. A *follow-on agenda* for continuing analysis during years 2-5.

**1. Profile**

a. Develop demographic profile of Jewish education needs in the community.

- Jewish population characteristics: cohort sizes (e.g., early childhood, school age lay leaders, adult education learners, college-age youth, other special groups, like mixed married couples)

b. Develop inventory of program capacities and participation rates (formal and informal programs) including:

- A profile of the institutional resources, programs and services presently available in the community.
- Present enrollments and participation rates (i.e., percent of group attending), and recent enrollment/participation trends.
- Estimate of the capacity of each program if it is not being fully utilized.

(See Box 4 for categories of information to describe each program area.)

c. Develop profile of present Jewish education personnel by drawing on available data. (Note: knowledge of educator strengths and needs will be enriched as returns on the educator's survey, discussed below, are compiled.)

- Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood, camps counselors, JCC program staff, other informal education personnel) by institution/program
- Employment status (full-time, part-time) and years of service (e.g. in current position, in Jewish education in community)
- Qualifications, skills, expertise and background
- Salary and benefit levels



#### **Box 4: Elements of an Institution or Program Profile**

- **Organizational:**
  - type of institution, program (e.g., day school, camp, retreat center, etc.)
  - denominational affiliation
- **Students:**
  - enrollment and graduation trends
  - age range
- **Educators:**
  - numbers of full- and part-time
  - areas of expertise
  - qualifications
  - turnover/retention rates
- **Program components:**
  - subjects
  - degree(s) offered
  - in-service staff development
  - activity duration
  - methods
  - support resources (e.g. library, training) and services
- **Finances**
  - cost per unit of service
  - revenue and expenditure trends
  - major sources of revenue

d. Summarize community expenditure levels for major categories of services. E.g.:

- Central agency
- Day schools
- Supplementary schools
- JCC education services
- Camps

## **2. Needs Analysis**

A needs analysis identifies unserved and underserved needs for Jewish education. It will include:

- Educator's survey

- Market analysis: selected client/consumer groups
- Assessment of quality

### Educators' Survey

Given the critical importance of personnel in Jewish education and its centrality in the Lead Communities Project, an educators' survey should be an early and major component of the needs analysis. While the first round presentation of the community profile of Jewish education (see above) will compile presently available information on personnel, there are likely to be large gaps. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 5 contains ideas for areas to cover in a survey of Jewish education personnel. Adapting or building upon educator surveys undertaken in recent years by other communities is also recommended. Communities may contact CIJE for assistance in identifying useful prototypes.

Make sure to involve experienced social scientists, and educators from formal and informal settings in the design and implementation of the survey. Involving people from the field will improve the quality of the data elements selected, help avoid time and resource consuming efforts to obtain unavailable information, help pave the way when it comes time to collect data, and help mobilize educators to support the overall objectives of the commission.

Summarizing, the initial thinking about the educator's survey should take several factors into account:

- Purpose of the survey: E.g.
  - to provide detailed profile of personnel characteristics
  - to understand personnel strengths, weaknesses and needs (e.g. qualifications, turnover, shortage areas)
  - to establish a database for future comparisons
- Potential uses, outcomes. E.g.:
  - to identify in-services training needs
  - to understand the structure of employment (is most of the work force very much part-time, vocational, or avocational, reasonably well paid, or not)
  - to identify priorities for recruitment
- Categories of Information: What information is desired (see Box 4)
- Database: Allow for growth, in number of information fields as well as in number of records
- Involve educators from formal and informal settings
- Select survey director, or researcher with requisite expertise. In selecting staff, or

contracting with a researcher, thoroughly review assignments, expectations and workplans

In view of the importance, complexity, and ongoing nature of this aspect of the lead community effort, it may be advisable to convene a special task force (if such a task force was not built into the organizing framework) to oversee this phase of work.

**Box 5: Educators' Survey: Possible Categories for Inventory (Illustrative only)**

- Demographic profile (e.g., sex, age, marital status, address)
- Affiliation
- Jewish education background (e.g., degrees, licensure, courses and programs)
- In-service staff development (subjects, scope and level)
- Work history
- Jewish education work experience (e.g., years of experience, present and recent positions, full-time and part-time weekly hours; camp, other summer and other part-time jobs)
- Secular education positions
- Salary history, in Jewish education
- Inventory of formal and informal expertise (e.g., Judaic/Hebrew; age level specializations; teacher training, resource room management, special education; organizing, supervisory or administrative skills). Classifiable as:
  - Areas of knowledge
  - Skills
  - Special talents
- Attitudinal questions (e.g., Jewish education career intentions; job satisfaction and priority concerns)

Market Analysis

A market analysis attempts to quantify the unmet demand among different client groups for various Jewish education services/programs, and the potential pool of consumers who might participate if programs were made attractive enough to them.



Unmet demand, conceptually at least, is relatively straightforward: the difference between those who seek to participate in a program or service, and the available openings. Quantifying the potential pool is somewhat more complex. At the largest extreme it quantifies everyone in the consumer group, or cohort. The portion of the group likely to participate, however, will be affected by many factors, such as improvements in personnel and community mobilization -- the enabling options which are central to the success of this endeavor. Therefore, the market analysis should also seek insights on tactics to mobilize new segments of the community, and methods to recruit new people to participate in the enterprise of Jewish education.

Client Sub-groups: Jewish education takes place in formal and informal settings from infancy to grandparenting. There are no easy answers to the question of which (or whether any) sub-group or stage in life is the best one to start focusing attention and resources on. Therefore, with respect to potential client groups, two important issues should be articulated and addressed up-front:

1. Targeting: which client sub-group should be studied first?
2. Measures of Need: what is the appropriate definition of need?

Targeting: The first step is to select the key consumer groups, in addition to Jewish education professionals, to be the focus of research during the first round. One construct of categories from which to select client sub-groups is:

- Early childhood
- Ages 5-13
- Post Bar/Bat Mitzvah
- College age
- Parents of young children
- Singles
- Empty nesters
- Older adults

Given limited resources, it may make sense to fine tune the targeting still further by looking at specific age groups in particular program areas, for example, Israel programs for teens.

### Box 6: Targeting

Several criteria can be applied in making decisions about what information or which groups to target in the needs analysis.

- **Present knowledge:** How much is already known about the topic or the needs of the group? Has the issue or group previously been studied? Are there significant open questions about what the needs are or how they should be addressed?
- **Priority:** How high a priority is the topic or sub-group with respect to Jewish education? Are the needs of this group for Jewish education a major issue or concern in the community?
- **Scope:** Is the scope of its impact (for example because of size or centrality) likely to be large?
- **Feasibility:** What resources of time, effort, money are needed to answer the open questions? For example, does available personnel have the expertise to design and carry out the study? Are data collection instruments available in the community or elsewhere that can be adapted?

Measures of Need: There are three conceptual ways of considering need:

- a. "Market:" *Actual* demand by a defined set of people.
- b. "Standard:" A measure of how much people require, or, from the community perspective, what is needed to realize a set of aspirations.
- c. "Receptivity:" What people might *potentially* respond to, i.e. "buy", but cannot articulate because it is not within their past experience.

In designing the needs analysis, you must decide which measure or measures will be most useful for each subgroup. The CIJE's "Goals Project" and its "Best Practices" project may help reveal valuable insights which will help communities define appropriate measures. The criteria for targeting will be helpful in narrowing the measures as well (see also Box 6).

The quality of programs is generally measured by assessment of levels of achievement, or measures of performance. The task in Jewish education is substantially more difficult because of the paucity of satisfactory tests of knowledge or achievement, and the complexity of defining a set of generally acceptable standards. For these reasons, in the short run at least it makes sense to rely on "surrogate" measures of performance. For example, attendance and longevity/dropout statistics can be enlightening as indicators of changes in student performance. At the same time, lead communities may spearhead efforts to develop more direct measures of student performance. In undertaking developmental work of this sort, communities may want to draw upon the expertise of national organizations (e.g., CAJE, CJF, CLAL, JESNA, JCCA) and national training institutions with whom CIJE has developed partnerships.

If enrollment or attendance is low, or dropoff at age 13 is high, is it because the prospective students are not out there, no effort is made to recruit, the programs are poorly designed or because effort is needed to increase parental support? Information on the quality and effectiveness of programs is important for identifying strengths and weaknesses of the existing system, for developing strategies for improvement, and ultimately for establishing a baseline against which the impact of future efforts can be measured.

Regardless, the difficult in measuring quality dictates that in this area especially several iterations of study are necessary. Findings and gaps uncovered in one round define the task for the next round, as the community's efforts to better evaluate, collect information and conduct surveys are implemented, and bear fruit.

Generally speaking, three types of measures can be used: (1) input, (2) output or performance, and (3) outcomes. See Box 8 for examples of measures to consider. If you find an absence of information on effectiveness -- that, in itself, may suggest that critical issues for the community will be: How should programs be evaluated and against what criteria? What are the characteristics of an excellent educational program? Should there be a process for setting community standards and "accrediting" programs? Should there be an effort to develop community-wide performance indicators and what should they be?



### **Box 8: Illustrative Measures of Quality and Effectiveness**

- **Measures of inputs** are generally the easiest to obtain. Examples include: per capita expenditures for various age cohorts and programs, teacher/student ratios, average teacher salaries, per cent of teachers with advanced degrees, lay involvement, number of teachers participating in in-service training, curriculum units developed and introduced, increases/decreases in educator/participant contact hours, and etc. Comparisons can be made to provide perspective on where the community stands in relation to other communities and the nation on key indicators.
- Examples of **output or performance measures** include per cent of eligible population participating in formal and informal Jewish education by age group, levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, etc. Methods of collecting this information include sample surveys, questionnaires to program directors, focus groups (for satisfaction), self-studies by schools, alumni surveys, data collected by a central body such as the Board of Jewish Education or Federation, and information collected in recent Jewish population studies.
- **Outcomes** are the most difficult to measure. It is useful to articulate what these might be, even if the data is not available, because it will be helpful in developing the mission statement later on as well as for suggesting lines of future research. Examples of outcome measures would be self-definition and commitment to Jewish identity, values and practices; evidence of transmission of Jewishness to the next generation; affiliation with synagogues, communal organizations, support of Israel and Jewish institutions, etc.

Community Mobilization: Through the very process of moving forward as a lead community and of engaging in the market analysis, findings will surface about the strengths and shortcomings on the awareness, involvement and commitment of various sectors of the community about Jewish education programs and commission initiatives. Examples of areas of potential attention include:

- Communication and collaboration between program professionals and rabbis
- Involvement of teachers, educators in informal settings in articulating problems and solutions
- The size (and growth) of the cadre of committed and supportive lay leaders, parents and/or donors
- The presence (or absence) of regular publicity/information announcements about Jewish education programs, performances, or initiatives (e.g. columns in the local Jewish newspapers, community program catalogues, regular flyers, etc.)

These findings should be documented as part of the market analysis so that recommendations can be put forward to further mobilization of the community.

### Summary of Benchmarks/Tasks

1. Design Needs Analysis
  - a. Focus: Select the primary element, issue or program to be studied
  - b. Measures: Decide on the method(s) for measuring the needs (see Box 8)
  - c. Develop Concept Scheme: Layout decisions on design for discussion with commission
2. Collect Information: on present participation levels
3. Estimate Community Need/Demand
4. Gaps [3 minus 2]: a comparison of the market demand for the present programs will give an estimate of the unmet needs: who are the "unserved" or "underserved" groups in the community from the point of view of adult Jewish education?
5. Qualitative Analysis: compile findings on problems, and limitations on program quality or effectiveness and recommendations for improvement
6. Community Mobilization Impacts: compile findings and recommendations on recruitment and deeper involvement of students, personnel, leadership, parents and other stakeholders



### **Box 9: Methods**

**Defining Potential Markets:** Four types of information can be used to identify the needs of user groups. As a rule, malleable methods should be employed because no single method will give a full picture of participation levels, and the quantitative and qualitative limitations in the programs available for different groups.

- Available demographic studies and data: enrollment trends, statistics on personnel involved in Jewish education and communal affairs (e.g., full-time, part-time, turnover, longevity ...), enrollment trends in local day and supplemental school programs (as a predictor of future personnel demands).
- Other national and local studies, commission and planning reports: such as the report of the Commission on Jewish Education in North America, local reports of task forces on Jewish continuity, and strategic planning reports that give insights on trends or external forces that will impact on needs. Experience in other cities can be analyzed for possible relevance. Opportunities for program modification or expansion will be identified where substantial unmet needs are documented and where new revenue opportunities appear to exist.
- Discussion or Focus groups: with selected consumer groups (such as day and supplementary school educators, synagogue lay leaders, students) to gain insights on access barriers as well as desires.
- Questionnaires: attitude surveys of selected sectors of the Jewish community: e.g. about student career interests; motivations for participating in specific program; views of institutional or program strengths or weaknesses; perceptions of their own needs or desires for Jewish education; and past and anticipated involvement in Jewish affairs.

Identify a variety of submarkets. Attempt to estimate the size of each submarket, the extent of the need and the competition.

### **3. Follow-on Agenda**

Given the magnitude, complexity and the high stakes connected to developing the Lead Communities Project, self study should be on-going -- not a one-shot effort. Findings on one issue inevitably will raise more sophisticated questions. Moreover, limits on time and resources, information availability, and research capability dictate that the process be phased over a period of several years. The lead community will need to decide which parts of the self study to begin the first year, and which to postpone to later years.

Consequently, the objective should be to develop a design for years 2 through 5 for further data collection, in-depth studies in personnel, refinement of community mobilization efforts, and development of assessment instruments to better measure quality of formal and



informal Jewish education programs (for example, achievement measures to test knowledge of supplementary school students).



### III. CRITICAL ISSUES

*"The Jews of North America live in an open society that presents an unprecedented range of opportunities and choices. This extraordinary environment confronts us with what is proving to be an historic dilemma: while we cherish our freedom as individuals to explore new horizons, we recognize that this very freedom poses a dramatic challenge to the future of the Jewish way of life. The Jewish community must meet the challenge at a time when young people are not sure of their roots in the past or of their identity in the future. There is an urgent need to explore all possible ways to ensure that Jews maintain and strengthen the commitments that are central to Judaism."*

A Time to Act, p. 25-26

#### Rationale

In charting future directions, any community faces a number of important policy choices: i.e., critical issues. Early discussions of the planning committee are the first step in identifying the critical issues in personnel and community mobilization. Findings emerging through the ongoing self study, including information on educators, areas of needs in mobilizing the community, and program strengths and weaknesses, will help sort out and clarify the fundamental decisions.

#### Deliverables:

- Explicit assumptions
- Formulation of critical issues
- Document summarizing consensus of committee on each critical issue

#### Benchmarks and Methods

1. Assumptions: In designing the best possible system for coordinating and supporting Jewish education, there will be several fundamental "givens" (e.g., overcoming shortages in qualified Jewish education personnel will require a systemic action in many areas, not just a single program). These assumptions should be made explicit to ensure agreement by the commission. Assumptions on which there is not consensus may well become "issues" which the committee must address (see Box 10 for sample assumptions).

### **Box 10: Sample Assumptions**

1. Shortages in qualified Jewish education personnel will not be satisfactorily overcome until a series of systemic problems in the profession are addressed (e.g., salaries, training, career opportunities, empowerment in decision making) -- not just one element.
2. Talented young adults can be enticed to enter careers in Jewish education if major communal leaders (lay, rabbis, educators, professionals) take an active role in the recruitment process.
3. Significant levels of increased funding for Jewish education will not materialize if community leaders are not included early in the planning and decision on actions.
4. Jewish education has a more powerful impact on students when formal and informal experiences are linked.
5. The delivery system needs to offer an opportunity for balance (creative tension) between community-wide perspectives and the perspectives of the religious movements (Reform, Conservative, Reconstructionist and Orthodox).

2. **Critical Issues:** The most important choices on enabling options faced by the community must be defined and resolved in order to set priorities in Jewish education. The planning committee will attempt to reach agreement on what the important questions regarding personnel, community mobilization, and future investment in Jewish education throughout the community.

The selection of the critical choices is as important as the commission's decisions on their resolution. Omission of, or "papering over," a burning issue is likely to exacerbate future discord and confusion in the community. On the other hand, the omission may choose to table for the present a particular issue on which it is unable to achieve resolution. By this means it acknowledges recognition of an important problem and its intention to return to it.

Because the formulation of the critical issues is pivotal to the development of the mission and the rest of the planning process, you are urged to confer with CIJE and tap its resources. As with other parts of the process, CIJE will facilitate sharing experience with the other lead communities.

In defining and organizing choices, it may be useful to classify issues in cascading categories that proceed from more philosophic (i.e., mission) toward more operational (i.e., programmatic or organizational). (See Box 11 for types of issues.)



### **Box 11: Classification of Issues**

1. **Mission-level issues** -- i.e. choices relating to the vision, philosophy and the role of the community in initiating or supporting the emerging needs.
2. **Policy issues** -- i.e. choices relating to the broad policies relevant to carrying out the community's mission. Some of these choices relate to professional development (e.g. the balance between in-service and pre-service training for pre-school teachers); recruitment (e.g. the balance between new entrants into the field, continuing education; re-training people from other fields); and community mobilization (e.g., the trade-offs between early action to create a sense of community support, versus the slower process of involvement of stakeholders in planning to build ownership).
3. **Standards and Program Issues** -- choices relating to the content and level of programming in Jewish education (e.g. what form of in-service training: mentoring program, workshops and course offerings, personalized growth plan for each educator, some of each, or what kind of staff development incentive plan: completion bonus, waived fees, contractual requirement).
4. **Resource and organization Issues** -- i.e. choices relating to the present or, more importantly, future capacity of the community to support mission and policies (e.g. the financial resources, agency roles, possible coordinative and integrative mechanisms). Stated differently, which actors, agents, or agencies will be/must be responsive to change on its Jewish education agenda.

#### IV. MISSION OR VISION STATEMENT

*"Jewish education must find a way to transmit the essence of what Jewish life is all about, so that future generations of Jews will be impelled to search for meaning through their own rich traditions and institutions. Judaism must be presented as a living entity which gives the Jews of today the resources to find answers to the fundamental questions of life as readily as it did for our ancestors through the centuries."*

A Time to Act, P. 27

##### **Rationale**

The heart of a strategic plan is a mission (or vision) statement, which should project a clear view of the aspirations of the community. The mission statement for the lead community should project a self-image of the community in relation to the enabling options for Jewish education. A good mission statement not only suggests what the community wants to accomplish but what it does not seek to accomplish; at the broadest level, it identifies whom it seeks to serve and how.

The mission statement is the result of a process that includes deliberation by and consultation with a broad cross section of the community -- lay leaders, scholars, rabbis, educators and communal professionals, parents and other stakeholders.

##### **Deliverable**

A concise mission statement.

##### **Benchmarks and Methods**

Because of its importance, and the difficulty of crafting a good one, the mission statement needs to be the product of substantial analysis and discussion; it should be prepared in the middle of the planning process, not at the beginning. The CIJE goals project may be of help to communities as they formulate missions.

It should represent the resolution of mission-level critical issues and frame a broad response to the needs assessment. Some parts of the mission statement are not likely to be very controversial; others might be. It is helpful to identify the major options in relation to each critical issue as a framework for the key discussion at which the mission statement gets formulated (see illustration in Box 12 below):

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**Box 12: Illustrative Mission/Options Chart**

CRITICAL ISSUES	OPTION A	OPTION B	OPTION C
1.0 Depth or breadth in near term (i.e. next 1-1/2 years) new programs for personnel	Resources should be targeted on one key group of Jewish educators, such as senior educators in schools and informal settings	Programs should be designed to impact on all categories more or less equally of Jewish educators	Every Jewish educator should some benefit from a new program, however, at least xx% of the total new resources should be targeted to a single group
2.0 Priority for leadership training recruitment	Senior leaders should be recruited	Promising young talent, future leaders, should be recruited	Placement in programs based on motivation and self selection, on a first come first served basis
3.0 Community posture on an Israel experience for young people	Community responsibility to insure that every young person has an Israel experience opportunity	Joint community-congregation-family responsibility to insure that every young person has an Israel experience opportunity	Community responsibility to insure that xx% of young people have an Israel experience opportunity

## V. SETTING STRATEGIES AND PRIORITIES

*"... the needs of education have seemed to be less urgent, less insistent, more diffused [than other issues]; a problem that could be dealt with at some point in the future when more pressing problems have been solved. This is an illusion. ... we can no longer postpone addressing the needs of Jewish education, lest we face an irreversible decline in the vitality of the Jewish people."*

A Time to Act, p. 28

### Rationale

The purpose of this part of the planning process is to insure that Jewish communal resources available for Jewish education are directed to the lead community's needs and mission. This is accomplished by selecting effective strategies or policies, and setting appropriate priorities.

The policies in the plan represent resolutions of the critical issues identified above. Resolution of an issue need not strictly adhere to the alternatives that were considered when the issue was defined. It may combine elements of several choices or be an alternative not previously thought of.

Establishing priorities for any community is extremely difficult: first, because of the large number of programmatic options it would be desirable to undertake to increase community support or to build the Jewish education profession (e.g., increase salaries, upgrade senior educators, recruit new talent, expand training programs, open a resource center, develop a mentoring program, etc.); and second, because of the multiplicity of constituencies, and their differing values. A particular educational service may be very important to one group and unimportant to another. The challenge is to develop an approach in which all important views are heard, and then strategies and priorities are developed to insure that the community does not scatter its limited resources.

"Priorities" are seen as judgments about relative importance that inform decisions about use of non-fiscal resources (such as leadership and staff of community agencies), resource development (such as foundation and endowment development), as well as dollar allocation decisions in the budgeting process.

### Deliverables

- List of policy recommendations for the improvement of community mobilization
- Recommended priority rank and desirable sequence for each recommendation
- List of criteria used to select and rank policy recommendations

## Benchmarks and Methods

Good methods of priority analysis inform and support human judgment, but do not try to supplant it; formulas or mechanical weighing or scoring methods are typically not useful.

Options are the items to be ranked in setting priorities for improving personnel and mobilizing the community. In other words, an "option" is a direction, service, or new initiative that is a potential recipient or user of a commission resource. An options structure is an organized, systematic listing of all the possible options. The decision as to what to list as an option is an absolutely crucial one; for once that decision is made, it defines what gets ranked in priority-setting.

A good structure for priority-setting should help decision makers connect broad concerns with specific services or programs -- both those that exist as well as those program or services that do not, but that reflect community concerns.

There are three sources of criteria relevant to setting priorities among options:

- Criteria that are suggested by analyses of community needs in other areas. Other things being equal, one would tend to give priority to settings where the total needs are very large (e.g. personnel for supplementary schools) or where the gap between existing and needed services is the largest (e.g. in-service education).
- Criteria that derive from the community's mission statement.
- Criteria that derive from continental experience in planning for Jewish education. CIJE may be able to provide assistance in this area.

Sample criteria for the selection of effective strategies (policies) and priorities are illustrated in Box 13.



**Box 13: Sample Criteria for Selecting Strategies and Priorities**

- Supports professionalization of principals, teachers, and educators in informal settings -- including incentives for higher levels of education.
- Broadens lay leader involvement and support of Jewish education.
- Maximizes effective utilization of resources (minimize duplication).
- Maximizes the opportunity to integrate formal and informal educational techniques (e.g., family shabbatonim; camping + study programs; Israel study programs).
- Incorporates principles and methods that work, as documented by CIJE's "Best Practices" project.



## VI. DESIGNING PROGRAMS/PILOT PROJECTS

"Jewish education must be compelling -- emotionally, intellectually, and spiritually -- so that Jews, young and old, will say to themselves: 'I have decided to remain engaged, to continue to investigate and grapple with these ideas, and to choose an appropriate way of life.' "

A Time to Act, p. 26

Expanded, modified, and new programs of course are the most tangible part of the effort to improve Jewish education throughout the community. In the context of a lead community, they are important not just for the promise they hold to improve the enterprise, but also because they can serve as visible demonstrations that help attract larger circles of adherents.

The recent history of Jewish education, as with many other enterprises, contains instances of programs hastily put together to address frustrating problems. Here we hope to shift the emphasis toward the tried, proven and planned. "Best Practices," a CIJE project that is documenting successful programs throughout the continent and organizing them in a variety of categories, should be immensely helpful here. "Best Practice" programs are being classified in six areas:

- Supplementary schools
- Early childhood Jewish education
- JCCs
- Israel experience
- Day schools
- Jewish camping

The "Best Practices" project is now developing a method by which lead community planners and educators can learn from the best practices it has document and begin to introduce adaptations of those ideas into their own communities. This can occur through a wide range of activities including: site visits by lead community planners to observe best practices in action; visits by best practice practitioners to lead communities; workshops with educators in lead communities, etc.

We envision programs being launched in two stages: first a few pilot projects to get started; and a subsequent series of programs reflecting the vision and priorities of the Commission.

### **Pilot Projects**

A community may wish to launch a small number of pilot programs early in the process to begin getting results, to test ideas about which it has a reasonably high level of confidence of success, to gain visibility for its lead community project, and to mobilize the community and

create a sense of excitement. Programs selected as pilot should be ones which are likely to be consistent with long term directions, or likely to show results in a short period of time. Box 15 contains sample criteria for use in selecting pilot projects.

Selecting pilot projects that address high priority enabling options -- namely personnel and community mobilization -- is another way of helping to ensure the viability of the effort. Sample pilot programs are listed in Box 16.

**Box 15: Sample Criteria for Pilot Project Selection**

- Improves the profession (teachers, principals, and informal educators)
- High visibility -- likely to reinforce community mobilization efforts (e.g. catalyze stakeholder support)
- Maximizes the opportunity to replicate good results from other communities (e.g., via "Best Practices")
- Promotes multi-agency programming and cooperation
- Draws upon the resources and expertise of national training organizations (i.e., via CIJE partnerships)
- Can feasibly be implemented quickly



### **Box 16: Sample Ideas for Pilot Projects**

#### Personnel

- In-service training for educational leadership -- school principals and JCC program directors.
- In-service training for 2 teachers and 2 informal educators from each institution.
- Summer seminar in Israel for selected educators

#### Community Mobilization

- Leadership training program for congregational and agency board members
- A series of public forums on the Lead Community idea, "Best Practices" and/or goals and visions for Jewish education

### **Commission Programs**

A coherent set of programs should evolve from the commission process, reflecting the vision, strategies, priorities, and recommendations of the Commission. A refined set of criteria for program selection should also naturally evolve from those deliberations.

Program Selection: There are several methods for developing programs and working out program implementation details:

- Delegate responsibility for specific recommendations to agencies
- Empower task forces as part of commission deliberations.

Box 17 offers suggestions for developing program recommendations which, with some modifications, apply to each of the above selection approaches.

**Box 17: Steps in Developing Program Recommendations**

- Adapt commission criteria for evaluating ideas
- Develop list of promising program ideas: review "Best Practices" materials for promising programs, confer with CIJE, best practices sites, and/or national institutions
- Review most promising ideas for content, scope of impact, and quality
- Test assumptions: define questions and obtain answers
- Review with CIJE, national experts, and local users
- Detail program needs, operations and implementation
- Estimate costs
- Set priorities and phasing among program ideas
- Present priorities and justification to Commission



## VII. FINANCIAL RESOURCE DEVELOPMENT

*"... the environment in the Jewish community is not sufficiently supportive of the massive investment required to bring about systemic change. This affects the priority given to Jewish education, the status of the field of Jewish education and the level of funding that is granted."*

A Time to Act, p. 41

Lead communities will need to develop a short-term and a long-term strategy for obtaining funding to support Commission initiatives. Obvious potential categories include:

- Annual campaign allocations for local services (either increased amounts or reallocations)
- Creation or expansion of a fund for Jewish education
- Major donors
- Foundations (Jewish oriented, and possibly secular ones also)

Naturally, early on primary attention will focus on obtaining resources for start-up efforts. CIJE will assist lead communities by establishing and nurturing contacts between foundations interested in specific programmatic areas, and lead communities that are developing, modifying, or expanding their efforts in those areas.

We recommend that fundraising for this effort proceed in a planful way, much like the annual campaign:

1. Identify potential funders in different categories, e.g.:
  - Major donors
  - Medium/large donors
  - Family foundations
  - Community foundations
  - National foundations
2. Review strategies with CIJE
3. Match programs to funder interests
4. Identify person/team to make first contact. Consider enlisting Commission members for this role.
5. Follow-up, as appropriate.



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