MS-831: Jack, Joseph and Morton Mandel Foundation Records, 1980–2008.

Series C: Council for Initiatives in Jewish Education (CIJE). 1988–2003. Subseries 3: Lead Communities, 1988–1997.

Box Folder 36 1

Planning workshops, 1992-1993.

For more information on this collection, please see the finding aid on the American Jewish Archives website.

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2 DRAFT

Notes from CIJE February 4, 1992: Planning Meeting at Cleveland Federation

Participants:

. .V 10

Shulamith Elster, Chairman

Seymour Fox Adam Gamoran Mark Gurvis Annette Hockstein

Ann Klein Ginny Lovi Jim Meicr Jack Ukelos

I. Welcome

A. Purpose of this meeting is to sharpen our understanding of how a lead community is going to work: focus on the critical issue of outcomes and examine individual parts.

How are we going to get systems changed in the communities?

The challenge is how do we got these from here!

Hope by end of day to have:

- exchanged views on outcomes.

- discussed individual responsibilities as we proceed with recruitment and selection

- plans for interface/integration

From Adam Gamoran's paper:

 Need for a vision about the content of educational and community reforms.

 Need to modify the culture of schools and other institutions along with their structures.

 Importance of balancing enthusiasm and momentum with coalition-building and careful thinking about programs.

 Need for awareness of inherent tensions in an intervention stimulated in part by external sources.

II. Towards A Common Conception of Lead Communities Seymour Fox.

What would a lead community look like 3 to 5 years from now?

Importance of agreement of planning group on this conception.

Topics for consideration:

A. Community

B. Personnel

enabling options

e. L Content

D. Evaluation

E. Planning/Staffing

A. Community

Community mobilization for the activity

- How would community behave? How would they understand why program areas were chosen? Agree to educational principles from choice to implementation:
 - vision of how institution
 - this is what we are doing and why ability to articulate this
 - leadership group with a "champion"
 - "wall-to-wall" coalition; ideological representation (perhaps not 100%) -Key is diversity
 - increased funding evaluation;
 compensation; other not a one-shot deal; ongoing
- 2. Advocacy is an important issue
 - need <u>local CIJE</u> or Commission
 - local and continental joint planning and authority
 - effective governance structure in place (centralized or decentralized)
 - setting of goals reaffirming of pluralistic nature of Jewish life, intra-denominational
 - public debate on educational issues, "ferment", Jewish education and identity building
 - place for synagogue and community/Federation to come together
 - "Coapting" local lay leaders to the cause of Jewish education.
- 3. Models: Lab and Lead Communities

Lab: creating optimal conditions to create solutions to problems facing Jewish education

goal: prototype

- issues related to the economics of Jewish education
Issues of replication become a detail

<u>Lead Communities</u>: systemic change in a second model for less controlled-emphasis on far less central control for less effective variety of experiments

Lab - prototype

Lead community - how far can a community stretch as a demonstration site for improvement in specific areas of Jewish education?

- Mark's suggestion for language in speaking about the project.
 - 1. lever
 - 2. scope of funding
 - 3. bring people to table
 - 4. Catalyst

The expectation is in the level and rate of change.

- B. <u>Content</u> Lead Community has overarching mission and vision that categorized whole and the parts
 - Ask denominations: What is <u>your</u> product? The definition or product of education Jewish will characterize projects.
 - 2. Other next stage elements that are common to the whole community:

The mission of Jewish education for each constituency is articulated, specifically.

Scope to make a difference. What is likely to make a difference?

Minimum standards with rationale for every choice.

Multiple visions.

Explain its scope.

3. How many elements?

formal - informal: balance
trips to Israel
age span/coupling
What percentage have to be involved?

4. Standards:

LC must have ongoing education for professional staff/continuous.

What standards exist for in-service/on-going education?

5. Consider what CIJE needs to work with the LC/

"We had better be state of the art."

Translating an idea from one place to another.

Great ideas have to be articulated/understood

Do they really understand the idea?

How are we going to introduce this idea?

Relationship between this and in-service/
investment of time, effort and energy.

6. Rationale for our choices - We decided not to do this - but, to do this because ---

BP people forcing community to undertake process of defining outcomes;

Need a checklist to include: Where is the rationale? Here are the outcomes?

Parts in relationship to whole

2 + 2 = 5

Day school and Israel program = more than sum of the parts issue of system change.

Why are the combination of four elements greater than four ?

7. Best practices applied through explicit learning and reinventing process =

Realities of absorbing interventions.

- 8. Year for program design.
- 9. CIJE needs to prepare a menu of CKTOCOL.
 - Issue of getting institutions to work together What will it take to make it successful?

Intracommunity planning Are we working with most of the people in some
ways?

10. <u>Scope</u>:

Questions raised at SPA

Critical points in life span of Jewish "receptivity."

Foundation need to be encouraged for college experiment.

C. Content

Best Practices -Barry Holtz:

- 1. initial cycles
 - a. Supplementary
 - b. JCCA entry point to informal cd.
 - c. Israel
 - d. Pre-School/Early Childhood
 - e. Day School

Hope to complete five areas by the end of this year.

- 2. Probable next rounds after these:
 - a. College
 - b. Camping
- 3. If you were setting up the best school in X, what would you include?
- 4. JU: Best practices v. best institutions. How are you going to get this into communities
- Barry prepared a check list as guide to writing up the supplementary schools.
- 6. Document produced will be somewhere between a portrait and a report: Use: Best Practices Project as a wedge to get funding for research/ethnohraphic studies.
- Materials for LC may include Barry's guide for looking at Best Practices in the Supplementary School.
- 8. JU: documents will not carry themselves; issue of confidence in the examples -

Personnel

New people.

Fox

2. New positions career ladders
horizontal and vertical
emphasis on special ed/early childhood

- Thoughtful and improved conditions for staff.
- Ongoing education for staff
 LC targeted game plan

. I.E.P. - diagnostic prescriptive plan

recruitment strategies M.A. - Judaic Staff

"fast-tracks"

recruitment pools - grants for Ramah alumni for 1 years

 Positioning national training institutions and other national resources - JESNA, JCCA

Personnel

National Organizations



- 7. Implementation must be taken into account
 - o desire to do (motivation)
 - o ability to do
 - o understanding to do
- 8. JU's issue: empowerment:

training institutions - "ennobled" training program - emphasis: Are new ideas being introduced? At what point does local community take over?

Project -

defining content, standards, need to give front-line educators a stake inthe process.

Empowerment for what?

D. Evaluation - MEF

(Monitoring, Evaluation, and Feedback)

- 1. MEF and its relationship to performance management.
- 2. Adam's issues:
 - a. Objectives as per- A Time to Act
 - b. To what extent is community mobilized for Jewish education?
 - c. Is there a vision?
 - d. Do they have an idea of how institutions will be different years from now?
 - e. Incorporate quantitative indicators (number of participants, qualifications of personnel).
 - f. Base-line survey.

1 CD. 10 100 -- CON 1 1 00

Mark: A manual may provide structure for the dialogue.

Funder and funder-o brokering

Outside resources

financial resource development for LC
need list of items and price tags associated with
them -

Assignment: funding - fundaring brokering coordination/ a money meeting. A +/SF + HLZ + SHH

talent bank - "line of credit' issues of cost need to have some image of what it will cost (to CIJE and to LC

CORE: Administrative Support

1. What is a plan?

2. What does the plan look like?

Role of CIJE Lead Communities Committee -

Assignment: A plan for the planning process to prepare for involvement of others.

2/10/92

This is a file on the actual joint seminar



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Monitoring, Evaluation, and Feedback Project Ellen B. Goldring November, 1992

The goal of the first year of the project is to monitor the process of becoming a lead community and focus on the present state of affairs in the communities as well as visions of change in terms of mobilization, professionalism and programs.

All of the field researchers have had initial contact with the lead communities and one of the field researchers has moved to Atlanta. The second field researcher will be moving to Baltimore this month. The third field researcher lives in Madison, WI., and will be responsible for Milwaukee.

The first set of visits to the lead communities is underway. All three of the field researchers will be in the same community during the visits:

Milwaukee- Nov. 15-21 Baltimore- Dec. 6-10 Atlanta- Dec. 12-17

Since the announcement of the three lead communities, the Monitoring, Evaluation, and Feedback Project is concentrating on four broad areas.

I. Introducing Field Researchers to the Lead Communities

Initial meetings in the communities
Ongoing conversations with key people
Learning about the communities
Establishing a trusting and effective relationship

II. Focusing the content

Focus 1: The Launch and Gearing Up:

Learning about the process of getting going and becoming prepared

Reacting to being chosen as a lead community

Developing relationships with CIJE

Helping communities think about themselves

Focus 2: Visions of Change:

Community mobilization

Professionalization of Jewish education

Actuality--what is in place now? What is going on now? Who participates? How?

What is the process of change?

Implementation plans

III. The methodology

Interview protocols around the areas of:

- preparation
- mobilization
- professional lives of educators
- background information

Sampling procedures (lists of people/functions)

Observations

Collection of documents and artifacts

IV. Issues under discussion,

Reports and feedback

Access needed by researchers

Communication



UKELES ASSOCIATES INC THE CABLE BUILDING 611 BROADWAY NEW YORK, NY 18612 Tel. 4212) 260-8758 Fax: (212) 260-8760

November 20, 1992

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

Dear Steve,

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

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

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

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

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

We look forward to a productive engagement.

Very truly yours,

Jacob B. Ukeles

President

Tuesday morning, November 24th: Planners Seminar/ CIJE

- I. Welcome- note of personal privilege listening to reports... proposals... site visits... phone calls... field researchers... Jack/ Memo of Understanding... reading, keeping in touch (Baltimore: BJE, Milwaukee: Principals Council ? of wall-towall/anecdote about rabbis and hats: Atlanta/ GA Bill Shatten "ready to go" what do we have to do? Adding to Steve's report re:schools, conversations with Cheryl)
- II. Today's agenda: translation/ Melton publication: From the Scholar to the Classroom. issue is that of translation, of working with a text, an idea to shape it and make it into one's own.

There is no way to properly acknowledge the contribution of an idea- most especially one that has the potential to transform. In all of the introductions last night there was one element that was missing and that was a note ot gratitude and appreciation to Professor Seymour Fox and Annette Hochstein for the idea that brings us around the table today.

And around the table today we have wonderful resources for "translating these ideas".... while it is tempting to use the metaphor of speciality teams ____ (given the Redskin's season this year) I will try to resist.

You: the planners key to the kingdom

the planning team/ Jack and Jim and Jon (JESNA's resources)

the education team/ Barry

the field researchers: who will reflect and provide us all with feed-back about all events associated with this project including today senior

the Mandel Institute/researchers who will continue to work with Annette on the Lead Communities Project in North America

III. Two topics to explore in the first segment of the morning: two enabling options: elective and required courses building blocks...

Building the profession of Jewish education

Building community support

What are the things that are now happening in your community that you see as building the profession of Jewish education?

What are some of the things that have to happen in your community to build the profession of Jewish education?

What are the goals? What are the specific objectives? PRIORITIZE....

What would it take to achieve these?

What are the obstacles? What would have to be done to overcome these?

What will it take?

IDEA

AMERICAN JEWISH
A R C H I V E S

Mobilizing community support- By recruiting top community leaders to the cause of Jewish education; raising Jewish education to the top of the communal agenda; creating a positive environment for effective Jewish education; and providing substantially increased funding from federations, private foundations and other sources.

(A Time To Act)

A lead community will enlist top local leadership representing all aspects of the community. The most respected rabbis, educators, professionals, scholars and lay leaders will serve on community-wide steering committees to guide the project...

(Program Guidelines-Lead Communities)

Recruiting Community Leaders
Increased Funding for Jewish Education
Changing the Community's Attitude toward Jewish Education

Building a profession of Jewish education- By creating a North American infrastructure for recruiting and training increasing numbers of qualified personnel; expanding the faculties and facilities of training institutions; intensifying on-the-jon training programs; raising salaries and benefits of educational personnel; developing new career track opportunities; and increasing the empowerment of educators. (A Time to Act)

The central thesis of the Lead Communities Project is that the best way to generate positive change at the continental scale is to mobilize the commitment and energy of local communities to create successes that stand as testimony to what is possible.

(Program Guidelines-Lead Communities)

Recruitment
Developing New Sources of Personnel
Training
Improvement of Salaries and Benefits
Cæreer Track Development
Empowerment of Educators

BUILDING A PROFESSION

Recruitment New Sources Training Salaries Career Empowerment Benefits Tracks





1991 Federation Campaign* Results (excluding endowment gifts)

	TOTAL		AMOUNT	PER C	APITA	CHANGE (%)
	AMOUNT	JEWISH	RAISED	RANK V	VITHIN	IN TOTAL AMT
CITY	RAISED	POPULATION	PER CAPITA	CJF GRO	UPING	1989-1991
				Group**	Rank	
BALTIMORE	\$21,587,000	94,500	\$228	G1	5	2%
ATLANTA	\$11,682,000	67,500	\$173	G1	9	14%
METROWEST	\$19,903,000	121,000	\$164	G1	10	-3%
BOSTON	\$20,267,000	200,000	\$101	G1	15	-21%
COLUMBUS	\$5,950,000	17,000	\$350	G2	2	-4%
MILWAUKEE	\$8,793,000	28,000	\$314	G2	3	-4%
PALM BEACH	\$12,501,000	65,000	\$192	G2	9	17%
EAST BAY	\$3,700,000	35,000	\$106	G2	18	20%
OTTAWA	\$3,363,000	14,000	\$240	G3	11	-2%

Allocations for Jewish Education

	TOTAL LOCAL ALLOCATION*	TOTAL ALLOC FOR JEW ED***	ALLOC FOR JEW ED (%)***	PER CAPITA ALLOC FOR JEWISH ED
ATLANTA	\$3,510,000	\$1,096,000	33%	\$16
BALTIMORE	\$14,543,000	\$3,003,000	22%	\$32
BOSTON	\$7,654,000	\$2,099,000	28%	\$10
COLUMBUS	\$1,842,000	\$447,000	26%	\$30
EAST BAY	\$1,263,000	\$246,000	23%	\$7
METROWEST	\$6,159,000	\$1,330,000	21%	\$11
MILWAUKEE OTTAWA****	\$3,701,000	\$1,247,000	36%	\$45
PALM BEACH	\$3,239,000	\$779,000	26%	\$12

^{*} Excluding United Way

** CJF grouped according to city size: G1=Large, G2=Large Intermediate, and G3=Intermediate

*** Based on 1990 allocations. CJF data on Jewish education allocations in 1991 are not yet

Information for Ottawa is not available: Canadian cities employ different methods for allocation

MEB - These meetings on Nov. 19-20 were actually the first CIJE joint seminar - like the one were having next week. Let. do a divider for "joint seminars" + this will be a sub-file - w/ the dates: Joint Seminar - 4/45-20/92 Planning Meeting - 11/19-20/92

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Lead Communities Planning Workshop November 23-24, 1992

AGENDA

Monday, November 23

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

Tuesday, November 24

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

Community "Caucuses"

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

III. Organizing for Change: Structure and Process

LUNCH

- Work Plan -- YEAR ONE IV.
 - Introducing the Project into the Community Assessing the Educational System Preparing the 5-Year Plan Projects for Immediate Implementation
- Working Together: CIJE and Lead Communities ٧.
- VI. Next Steps

VII. Evaluation of the Day

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Tuesday, November 24

I. Central Elements:



9-10

- Building the Profession
- Mobilizing Community Support

Community "Caucuses"

- II. How CIJE Can Help /0:00
 - Best Practices and Consultation BH
 - The Goals Project
 - Monitoring, Evaluation, and Feedback
 - Contributions of foundations, organizations, and providers of programs 5 E

JU

lunch

Organizing for Change: Structure and Process III.

LUNCH

- -5W Work Plan -- YEAR ONE IV.
 - Introducing the Project into the Community Assessing the Educational System Preparing the 5-Year Plan

 - Projects for Immediate Implementation
- Working Together: CIJE and Lead Communities
 Clarify roles 4 responsibilities ٧.

- Next Steps VI.
- VII. Evaluation of the Day

MONDAY, NOVEMBER 23

9:00 a.m.-12:00 p.m.

A. Rotman, M. Mandel, A. Hochstein, S. Fox

12:00-2:00 p.m.

A. Rotman, M. Mandel

6:00-9:00 p.m. UJA/Federation Staff and Lead Communities Planners Meeting

Participants:

Carl Leff Room 2nd floor

Daniel D. Marom Luner L. Azoulai Chum C. Botwinick J. Meier

130 E. 59th St.

S. Elster S. Fox

Herrard H. Neistein A. Rotman (MON only)

Steven S. Gelfand R. Goodman

Roberta

Claire Rottenberg July J. Tammivaara

A. Hochstein

J. Ukeles J. Woocher

B. Holtz Nancy Kutler

Showel S. Wygoda

Marshal Levin

VFL (Sec.)

TUESDAY, NOVEMBER 24

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

Staff & Lead Communities Planners meeting continued

JCCA Conference Room

15 E. 26th St.

4:30 p.m.-6:00 p.m. S. Elster, S. Fox, A. Hochstein, A. Rotman, J. Ukeles

Mazer Study

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From JO ANN SCHAFFER
Co. CIJE
Phone #
Fax#

LEAD COMMUNITIES A PARTIAL SCENARIO 1994 1993 1992 TASK NAME NOV D J F M A M J J A S O NOV D J F 4-6 PILOT PROJECTS LOCAL CIJE **EDUCATORS' SURVEY BEST PRACTICES** MONITORING, EVALUATION, FEEDBACK 5-YEAR PLAN COMMUNICATIONS, NETWORKING

LEAD COMMUNITIES—A PARTIAL SCENARIO

4-6 PILOT PROJECTS

PERSONNEL—IN SERVICE

Principals & JCC Execs

2 Teachers & Informal Eds from each Institution

1 New Hire

Israel Summer Seminar

Networking the 3 Communities

COMMUNITY MOBILIZATION

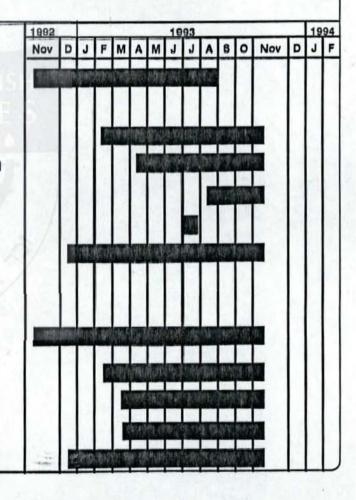
National Leaders Mobilize Local Leaders

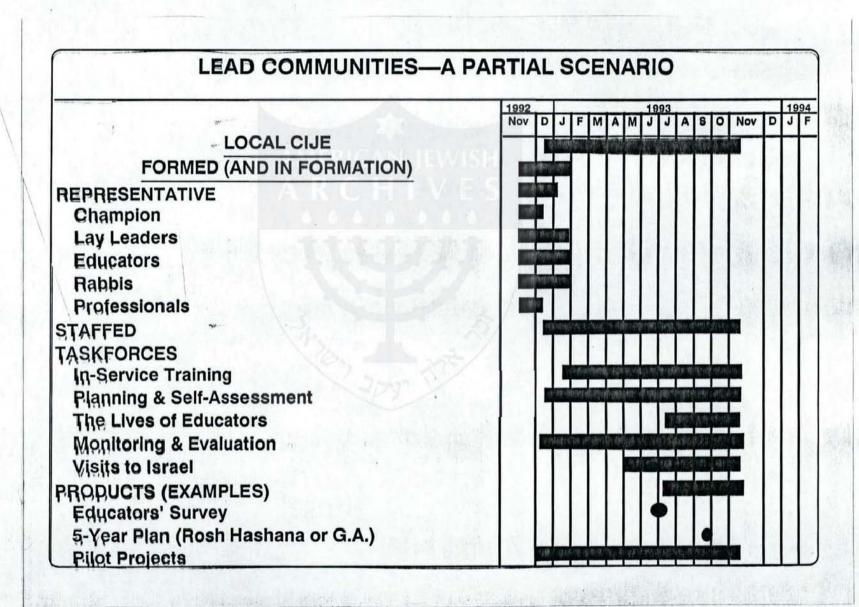
Leadership Training

Program for all Boards

Denominational Leadership Training

Public Sessions on Vision & Best Practices





LEAD COMMUNITIES—A PARTIAL SCENARIO **EDUCATORS' SURVEY** PLAN REPRESENTATIVE TASKFORCE STAFF (LOCAL UNIVERSITY?) MOBILIZE & INVOLVE EDUCATORS DESIGN **CARRY OUT ANALYZE** REPORT & DISCUSS FINDINGS

LEAD COMMUNITIES—A PARTIAL SCENARIO

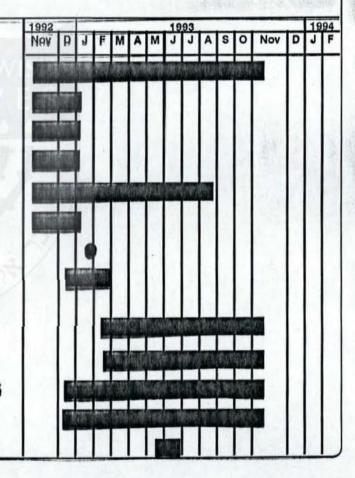
BEST PRACTICES

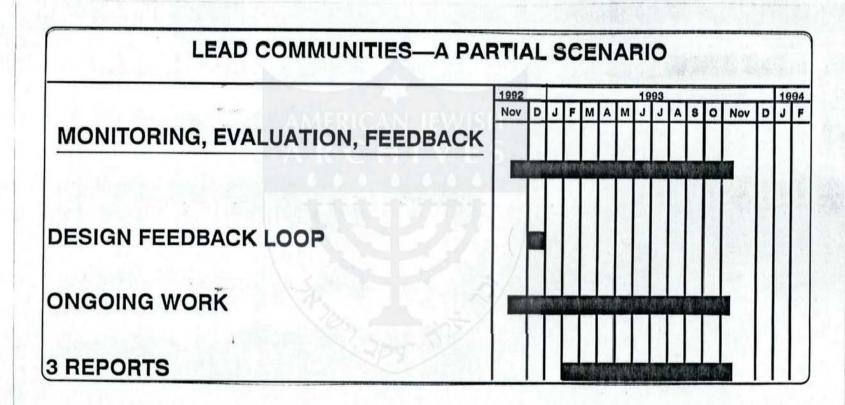
Develop Translation Method

6 AREAS COMPLETED
PROJECT PRESENTED
FIRST 2 AREAS SELECTED
CONSULTANTS SELECTED & TRAINED
WORK WITH SUPPLEMENTARY SCHOOL
PRINCIPALS
Joint Planning of Implementation

NETWORK WITH FARLY CHILDHOOD TEACHERS
Joint Planning of Implementation

PLAN ROUND 2 OF PROJECT





LEAD COMMUNITIES—A PARTIAL SCENARIO

5-YEAR PLAN (SEE SEPARATE)

ASSESSMENT OF EDUCATIONAL SYSTEM Prepare Detailed Guide

Profile

Inventory

Educators' Survey

Achievement Measures

Clients' Survey

Etc.

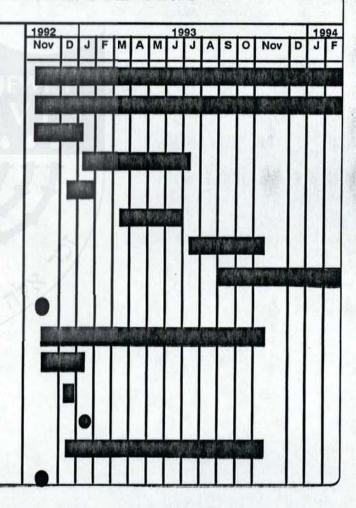
THE PLAN — ROUND 1
Prepare Detailed Guide

Staff

Taskforce Set-Up

Give Assistance as Needed

Etc.



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IMPLEMENTATION OF THE RECOMMENDATIONS

BUILDING THE PROFESSION

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

COMMUNITY MOBILIZATION

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

ISRAEL AS A RESOURCE

Plans for "every youth" Educators summer seminar

RESEARCH

Monitoring, evaluation, feedback DAta base—assessment

LEAD COMMUNITIES—A PARTIAL SCENARIO

4-6 PILOT PROJECTS

PERSONNEL—IN SERVICE

Principals & JCC Execs

2 Teachers & Informal Eds from each Institution

1 New Hire

Israel Summer Seminar

Networking the 3 Communities

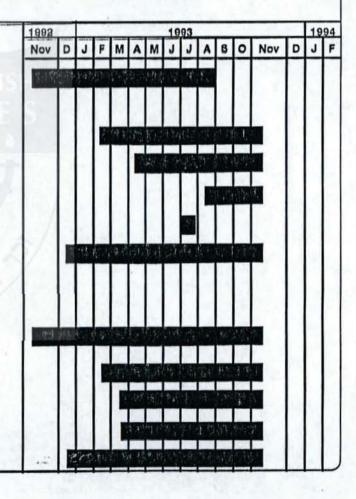
COMMUNITY MOBILIZATION

National Leaders Mobilize Local Leaders Leadership Training

Program for all Boards

Denominational Leadership Training

Public Sessions on Vision & Best Practices



LEAD COMMUNITIES A PARTIAL SCENARIO 1994 1992 1993 TASK NAME A S O Nov D J F 4-6 PILOT PROJECTS LOCAL CIJE **EDUCATORS' SURVEY BEST PRACTICES** MONITORING, EVALUATION, FEEDBACK **5-YEAR PLAN** COMMUNICATIONS, NETWORKING

LEAD COMMUNITIES—A PARTIAL SCENARIO LOCAL CIJE FORMED (AND IN FORMATION) REPRESENTATIVE Champion Lay Leaders **Educators** Rabbis Professionals STAFFED TASKFORCES In-Service Training Planning & Self-Assessment The Lives of Educators Monitoring & Evaluation Visits to Israel PRODUCTS (EXAMPLES) **Educators' Survey** 5-Year Plan (Rosh Hashana or G.A.) Pilot Projects

LEAD COMMUNITIES—A PARTIAL SCENARIO

EDUCATORS' SURVEY

PLAN

REPRESENTATIVE TASKFORCE

STAFF (LOCAL UNIVERSITY?)

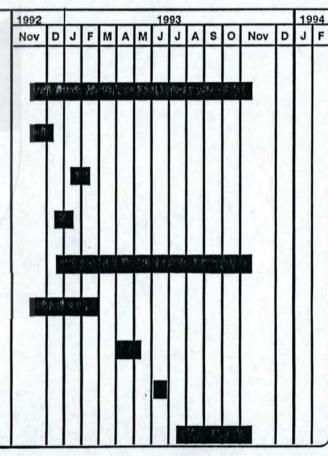
MOBILIZE & INVOLVE EDUCATORS

DESIGN

CARRY OUT

ANALYZE

REPORT & DISCUSS FINDINGS



LEAD COMMUNITIES—A PARTIAL SCENARIO

BEST PRACTICES

Develop Method for Training

Develop Translation Method

6 AREAS COMPLETED

PROJECT PRESENTED

FIRST 2 AREAS SELECTED

CONSULTANTS SELECTED & TRAINED

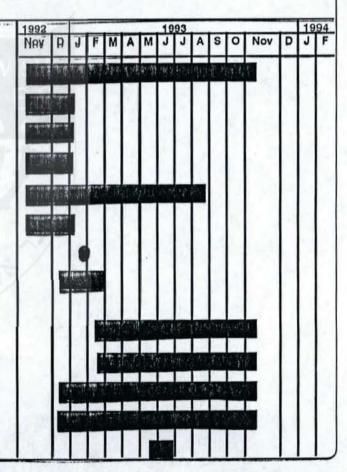
WORK WITH SUPPLEMENTARY SCHOOL

PRINCIPALS

Joint Planning of Implementation

NETWORK WITH FARLY CHILDHOOD TEACHERS
Joint Planning of Implementation

PLAN ROUND 2 OF PROJECT



LEAD COMMUNITIES—A PARTIAL SCENARIO MONITORING, EVALUATION, FEEDBACK DESIGN FEEDBACK LOOP ONGOING WORK 3 REPORTS

LEAD COMMUNITIES—A PARTIAL SCENARIO

5-YEAR PLAN (SEE SEPARATE)

ASSESSMENT OF EDUCATIONAL SYSTEM Prepare Detailed Guide

Profile

Inventory

Educators' Survey

Achievement Measures

Clients' Survey

Etc.

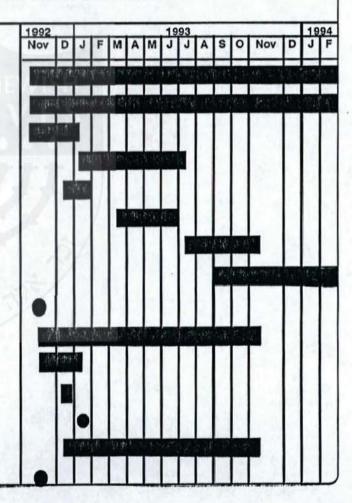
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Etc.



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LEAD COMMUNITIES TO EACH OTHER Shared Learning																
LEAD COMMUNITIES TO COMMUNITY-AT-LARGE (23)																

IMPLEMENTATION OF THE RECOMMENDATIONS

BUILDING THE PROFESSION

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

COMMUNITY MOBILIZATION

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

ISRAEL AS A RESOURCE

Plans for "every youth" Educators summer seminar

RESEARCH

Monitoring, evaluation, feedback DAta base—assessment

LAUREN AZOULAI (Atlanta) CHAIM BOTWINICK (Baltimore) SHULAMITH ELSTER SEYMOUR FOX STEVE GELFAND (Atlanta) **ROBERTA GOODMAN** ANNETTE HOCHSTEIN BARRY HOLTZ NANCY KUTLER (Baltimore) VIRGINIA LEVI MITCHELL LEVIN (Baltimore) DANIEL MAROM JIM MEIER HOWARD NEISTEIN (Milwaukee) ART ROTMAN CLAIRE ROTTENBERG JULIE TAMMIVAARA JACK UKELES

JON WOOCHER SHMUEL WYGODA COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Monday, November 23, 1992 6:00-9:00 p.m.
The Carl Leff Room

Jo Ann Schaffer will arrive before 5:00 p.m. to set up the room.

Phone: 532-1961

AMERICAN JEWISH ARCHIVES

TUES.	Meier	Rottenberg				, ,	Levi Levi
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TUES. Tammivaara Kutler Woocher Fox Neistein Elster Botwinick Goodaman Marom

MON. Tammivaara Kutler Woocher Fox Neistein Elster Botwinick Holtz Goodman Marom

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TO BLANCH ROTHMAN	From TO ANN SCHAFFER
Cd.	Co.
Dept.	Phone # 5-32-1941
Fax# 755-9183	Fax# 213-4078

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COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Lead Communities Planning Workshop

DATE OF MEETING:

November 23-24, 1992

DATE MINUTES ISSUED: December 9, 1992

PARTICIPANTS:

Lauren Azoulai, Chaim Botwinick, Shulamith Elster,
Seymour Fox, Steven Gelfand, Roberta Goodman, Annette
Hochstein, Barry Holtz, Nancy Kutler, Marshall Levin,
Daniel Marom, James Meier, Howard Neistein, Arthur
Rotman, Claire Rottenberg, Julie Tammivaara, Jack
'Ukeles, Jonathon Woocher, Shmuel Wygoda, Virginia
Levi (Sec'y)

I. Welcome and Introductions The head Communities - Atlanta, Backmie and

The meeting opened with the introduction of participants and welcoming hulwanter remarks by Arthur Rotman, Executive Director of CIJE. Mr. Rotman reviewed the agenda and noted the importance of the Lead Communities in implementing the recommendations of the Commission on Jewish Education in North America.

Representatives of the three communities were then asked to provide brief sketches of their work in Jewish education as a context for further discussion.

A. Atlanta

Atlanta has a growing Jewish population. In the early '80s Atlanta conducted a demographic study of the local Jewish community, followed by the development of a strategic plan. Included was a recommendation to reorganize the services of the Bureau of Jewish Education, reassigning functional responsibility to other appropriate agencies. Atlanta has five day schools. It is working with the CRB Foundation on the development of Israel experience programs, has a Commission on Jewish Continuity, and has recently established a Jewish Education Fund.

B. Baltimore

Baltimore has a stable Jewish population of 92,000. A two-year planning initiative concluded in 1990 with a series of recommendations including the need to increase funding for Jewish education (has been increased from 25% to 33%) and the establishment of a commission to look at the local Jewish education system, now in its third year. Outcomes include a strategic plan for Jewish education and the establishment of a Fund for Jewish Education which is currently undertaking a \$10 million campaign. Day and supplementary schools are beginning to

work together to provide training for educators and to establish a fund for Israel experience programs. A team of synagogue representatives is working together to develop a program of Jewish family education.

C. Milwaukee

With a population of 28,000, Milwaukee has four day schools in addition to an array of camps and pre-school opportunities. Twenty-five percent of the community affiliates with the JCC. Community strengths include the centrality of the federation, the availability of scholarships for day schools and a common cost for each day school, and coordination of teen programming. The cost of Jewish education is a central issue in a community where average incomes are relatively low. The community must also contend with a shortage of trained personnel and a 15% decline in campaign income over the last three years. A Jewish Education Task Force was established in July 1991 and has developed a plan for the revision of use of the Central Agency for Jewish Education. A broad-based commission on Jewish education is now being established. It should be noted that for many years Milwaukee has taken the lead in putting Jewish education high on its communal agenda and funding it accordingly.

II. Lead Communities: A Concept and its Implementation

- A. Annette Hochstein noted that the following principles had guided the work of the Commission on Jewish Education in North America:
 - Local, continental, and international resources must work together to support Jewish education.
 - 2. Jewish education has multiple constituencies and venues. The Commission concluded that the best way to approach Jewish education would be to focus on two necessary conditions for change:
 - a. Personnel -- recruitment, training, benefits and placement to build a cadre of well-trained Jewish educators.
 - b. Community support -- the need to engage top community leadership in personal commitment and financial support for Jewish education.
 - It will be important to engage a community "across the board" in its commitment to Jewish education.
 - 4. The best way to learn what will work is by doing it. Because education takes place at the local level, we must engage local communities in the effort to improve and develop Jewish education. This led to the concept of Lead Communities.

5. It was concluded that Jewish education must be raised to a level which permits it to compete with the many alternatives available. This can best be accomplished by bringing local and continental resources together, by working intensively in limited settings, by working through programs, and by constantly monitoring, evaluating, and providing feedback.

B. The Task Ahead

Mrs. Hochstein suggested a list of possible actions, some of which should be under way within the next year. This reflects the sense that communities wish to see concrete signs of progress as early as possible. One or more of the following should be undertaken as the community proceeds with the planning process.

- Pilot projects to be undertaken in personnel and community mobilization. In an effort to mobilize local top leaders, CIJE proposes to bring a member of its board to begin an ongoing dialogue with them on the Lead Communities project and its educational endeavors.
- Establishment of a local commission with broad representation, staff support, possible subcommittees or task forces and the possibility of one or several concrete products at the end of the first year.
- Conduct a survey of educators to establish the current situation as a basis for ascertaining training and staffing needs.
- Select one or two areas of Best Practices for early implementation e.g., supplementary school and early childhood, develop a plan and begin to work.
- Proceed with the design and work of monitoring, evaluation, and feedback.
- 6. Draft a five-year plan with the assistance of a detailed guide to be provided by CIJE.
- 7. Establish lines of communication among CIJE, the Lead Communities, and the continental community.

This presentation concluded the evening portion of the meeting. The group reconvened on Tuesday, November 24.

III. Introductory Remarks

As the morning session opened, Steve Celfand of Atlanta noted on behalf of the three communities that the Lead Communities hoped to resolve the following in the near future:

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- A. Believing that the communities can be more effective working together than on their own, they seek agreement on common goals and approaches to achieving those goals.
- B. The communities need clarity on lines of communication and whom to talk with about various issues.
- C. While acknowledging that the communities are "in this together," it was noted that not all community interests or needs will be the same. It will be useful to clarify where there are common interests and where they diverge.
- D. It would be helpful to clarify, understand, and agree to goals and objectives for the planning process.
- E. Clarity of direction will help workshop participants to return home ready to work with community leadership and move ahead.
- F. The communities need CIJE to be involved beyond the role of convener. They seek help with planning, content, and access to seed money with which to move ahead. CIJE should ease the way for communities to raise local money.
- G. The communities seek one programmatic initiative on which all can agree and move forward quickly to implementation.

These goals served as a backdrop for the day's discussion.

IV. Central Elements

the central elements -- building the profession and mobilizing community support -- were discussed, participants were asked to consider principles on which to proceed.

might be seen as principles.

- A. The personnel issues cut across all areas of Jewish education.
- B. There is need for a master plan.
- C. The role of resources in impacting Jewish education must be considered.
- D. In order to have an impact, there must be broad based "buy-in" to the importance of upgrading personnel.

In the discussion that followed it was noted that the Lead Communities provide a context in which to consider these issues systematically. It will be important to establish criteria on which to judge the impact of the various approaches. It was noted that the communities

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will rely on CIJE for help with evaluation. It was also suggested that lay leaders should be involved in defining the evaluation process.

It was noted that it will be difficult to garner lay support for approaches that cannot be evaluated, but that funders are likely to support what they see as a "reasonable gamble." With this in mind, an approach to be considered would be the identification of a project which can be undertaken and evaluated in the development of personnel, perhaps with a focus on senior personnel.

V. The Role of CIJE

A. Best Practices and Consultation

Barry Holtz outlined the work he has undertaken over the past 18 months to identify areas for study followed by the development of an inventory of Best Practices to provide models of excellence for introduction into Lead Communities. Best Practices research is being undertaken in the following areas:

1. The Supplementary School

This area was begun first and is nearly ready for use in the Lead Communities. A team of experts has identified nine successful supplementary school programs, has conducted site visits, and has submitted reports on these exemplary programs.

2. Early Childhood Jewish Education

This is being looked at in the variety of settings in which • early childhood education occurs. Reports are being submitted on exemplary programs.

3. The JCC

Each Lead Community has a JCC. The JCCA staff will visit each of the three to evaluate what is going well in Jewish education and where they recommend change. At the same time, outside experts will identify 8-9 JCCs which are most effective in the area of Jewish education and Jewish continuity. These programs will be explored and evaluated for use by the Lead Communities.

4. <u>Israel Experience</u>

We are working with the CRB Foundation, which is particularly interested in this area and is developing an approach.

5. Day Schools

We have begun to take the first steps into this important area, and to develop a methodology specific to it.

Still to be further developed:

6. <u>Jewish Camping</u>

College Campus

CIJE will work closely with the Lead Communities to determine how to introduce a successful practice from one setting to another.

It was noted that while the communities are engaged in the planning process, it might be useful to work toward implementation of a Best Practices approach. Holtz will have materials on the supplementary school to the Lead Communities within several weeks. Following their submission, we and the educators working on the project will be available to meet with community leaders to discuss areas of interest and means of implementation. The Best Practices might also be an appropriate framework for the development of a pilot project during the initial year.

It was suggested that in order to introduce the Best Practices project to the communities, Holtz would be invited to meet with local lay and professional leadership.

It was suggested that another area in which communities might be ready to move ahead relatively quickly is that of the Israel experience. It was noted that the CIJE has promised to outline for the CRB Foundation a proposal for the Israel experience in the Lead Communities.

B. Foundation Relations

It was reported that CIJE is in contact with several foundations, both Jewish and general, for support of work in the Lead Communities. In addition, CIJE staff is available to help Lead Communities in their approaches to local foundations. It was suggested that CIJE will be working with the Lead Communities to determine how best to proceed with their foundation development work.

It was suggested that there are initiatives under way in other cities which might be applicable in the Lead Communities. It was proposed that JESNA prepare an inventory of such initiatives and make it available to the Lead Communities.

VI. Work Plan -- Year One

A. Planning Process

Jack Ukeles reported that a planning guide is being prepared for use by the three communities. It is anticipated that the planning process will yield a five-year strategic plan and a specific action plan for the first year.

The proposed planning process includes the following seven steps:

1. Start-up

-- formulation of a commission; undertake to inform and involve stakeholders (e.g., community lay leaders, educators, rabbis, congregational leadership, etc.).

2. Self-study

- -- inventory and profile of educational system.
- -- assessment of strengths and weaknesses.
- -- analysis of personnel.

3. Identification of critical issues

- -- community moves from the general to the specific with strategic choices.
- 4. Development of mission or vision statement

5. Define priorities

-- major strategic recommendations with priority rankings and sequences.

6. Design programs

- -- specific programmatic interventions.
- -- new initiatives.

7. Determine strategy to develop resources for implementation

A question was raised regarding the amount of time the planning process would require and how it might be meshed with the local federation allocation process. It was noted that funds can be set aside for anticipated projects, making this a less significant issue.

All three communities expressed concern over the need for staff support of the planning process at a time when "flat campaigns" and local reluctance to add to federation staff make this difficult. It was suggested that if the first request to local lay leadership is to fund staff, this might impact negatively on the buy-in process. In light of the above, it was suggested that CIJE consider providing up to \$40,000 per year for three years toward funding of a position. It was agreed that this proposal would be seriously considered by CIJE.

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B. Introducing the Project into the Community

It was suggested that the first step is to define the community The following list of constituencies was developed:

- . Educators and senior educators
- 2. Rabbis
- Lay leaders -- of general community and individual institutions
- 4. Parents and learners
- 5. Professionals at federation and other relevant agencies
- 6. Publics: the media and other communities

It was noted that it will be important to communicate with all of the groups. One way to do this at the local level is for the commission process to include well-publicized open meetings at which anyone in the community could be heard. In addition to making the local commission as representative as possible and extending involvement through task forces, a community might wish to hold focus groups to encourage a stronger sense of involvement.

It was suggested that local leaders will buy in more completely when they see evidence of action. One successful project would go a long way toward accomplishing this goal.

To help the communities get op and running, CIJE will work with the local communities go provide the following:

1. Core materials

a. Best Practices papers

- b. Planning guide
- c. Timetable
- d. Press releases
- Support for the planning and evaluation processes at a local level.
- Assistance in quick start-up of at least one project, including funding support and/or assistance in finding that support.

following

- 4. Materials for use with focus groups.
- 5. A list of participants in this meeting and others who can be helpful to the communities in moving forward.

VII. Next Steps

- A. It was agreed that goals and agendas for future meetings of this group will be set jointly. In the interim, Shulamith Elster will serve as a clearinghouse for distributing materials among the Lead Communities and CIJE. Consideration will be given to holding a conference call as a follow-up to this meeting and a means of generating a project for early implementation.
- B. A meeting of this group, possibly to include lay leaders from the communities, will be planned for April 24, to coincide with the CJF Quarterly in Washington, D.C.
- C. It was suggested that one or more CIJE board members plan to meet with local law leaders early in 1993. Perhaps a kick-off celebration might occur at the same time.
- D. A paper on Best Practices in supplementary schools and steps for introducing Best Practices to the Lead Communities is now being prepared.

VIII Conclusion

The meeting concluded with a sense of hope and expectancy for the future. There was the sense that with ongoing communication and the shared mission of contributing to Jewish continuity for all of North America, the next several years should be exciting and productive.

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PLANNING STRATEGY FOR COMMUNITY PLANNERS WORKSHOP *

November 19-24, 1992

Two days of deliberations raised several important issues. Although conclusions were reached on many, some were left open for future consideration. In some cases, points were raised that may act as guide posts for further discussion or actions.

DAY ONE

ISSUE: WHERE DO WE WANT THE LEAD COMMUNITIES PROJECT TO BE ONE YEAR FROM NOW?

AH and SF brought to the meeting a series of expectations which might be used to judge the success of the first year of the Lead Communities Project. A preliminary list of objectives which should ideally be in some state of implementation by November 1993 includes:

- 4-6 pilot projects will be in place
- The Local Commission will be up and running and successful in engaging their various constituencies
- A Survey of the Community's Educators will have been completed
- The Best Practices Project will have prepared the educators and lay people for what might be and be a factor in the Five-Year Plan
- The Monitoring, Evaluation, and Feedback Project will have issued three reports
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* prepared by Jo Chan from takes and Menuter of Howorherop—

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DISCUSSION:

There is a definite need for a timetable but perhaps the timeframe should be adjusted for each community. The question of how many first-year programmatic objectives was left open because there is a very real possibility that this may be more than a community can accomplish in the space of one year, even with the high levels of enthusiasm and support the Project has generated. It might be more advisable to draw up a list of specific indicators of progress that we will not give up and those which we can allow the communities to hold off on for the moment.

Discussions focused on the fact that American Jewish communities are diverse, complex political entities. There are certain barriers that exist within each community that tend to forestall getting any process moving. ONE KEY ELEMENT seems to be that we must first engage every single one of the constituencies in the community that have a stake in this Project. ANOTHER KEY ELEMENT is the need to determine what

is the "glue", i.e., the visions and goals of the community, that will hold all of the elements of the community together for the duration of the Project?

CONCLUSION:

It is highly unlikely, given the realities of Jewish communal organization, that we will be able to do everything that has been described above. Therefore, we want to make sure that whatever the communities do that it is within the context of what we have decided with them fits the particular vision for each community and that if we drop something, it will be in accordance with our vision of the Project and within a framework that we determine in advance.

ISSUE: THERE IS A NEED FOR THE COMMUNITIES TO ENGAGE IN COMMUNITY BUILDING FOR THE PROJECT.

DISCUSSION:

Considering how our communities work, how they plan, change is easiest when it is done in little, discrete packages that fit into the niches that are available but do not challenge fundamental ways of doing business.

CIJE's role is to *launch* the process of change. The actual process will most likely take twenty years or more. Therefore the driving force for change must come from within the community. In terms of how we present the above projects, every effort should be made **not** to put the emphasis on the programmatic, but on the **enabling**. The steps we are suggesting should be viewed as "investments" in the future of the community vis-a-vis education.

We assume that the feasibility of the Project is predicated on the amount of effort that goes into the endeavor.

ISSUE: WE NEED TO WRITE OUT -- COMMUNITY BY COMMUNITY -- WHAT MAKES SOMETHING MOVE.

ISSUE: THERE IS A NEED FOR CIJE TO CRYSTALIZE ITS ROLE IN FACILITATING THE INTRODUCTION OF THE PROJECT INTO THE LEAD COMMUNITIES.

DISCUSSION:

All communities have a powerful lay leadership. We need to approach the inner circle with specific projects within the Lead Communities Project that they can fund; then approach the second circle, and the third circle. All these levels of givers need to be engaged and nourished. In addition, by generating enthusiasm among the lay leadership we can help allay any fears of federation execs about how the success or failure of this Project might affect their position within the community.

CONCLUSION:

Our attention needs to be very focused on maybe half a dozen or so movers and shakers in each community. It will probably include the federation exec, two or three lay people who are heavily involved in the governance of the community and in giving, and probably one or two rabbis. If we get these people with us and involved, the rest will inevitably follow.

CAUTION: We must not fall into the trap of thinking that once we have the key players on board, the hardest part of our work is done. A considerable amount of time and

attention should be given to "courting" other influential individuals in order to develop a truly community-wide base of support. Without this broad base of support we may not be able to move the process along quickly enough to sustain this effort.

ISSUE: GOALS PROJECT: OUR AIM IS TO LAUNCH THIS DISCUSSION ON THE LOCAL LEVEL. HOW IS THIS TO BE DONE?

DISCUSSION:

Perhaps the best way to begin this Project is to start with the denominations and then build to community-wide goals, rather than the other way round. There is a tug of war between those whose vision for a community is essential parallel tracks of Jewish education, each denomination unto its own, and those who would form an overarching vision for the community which does full justice to the integrity and individuality of each denomination.

The MEF Project is now trying to find out what, if any, goals the communities have set.

Our role is to help the communities identify their goals and offer them resources; CIJE does not set the goals for them. (This is a discussion that Barry Holtz would be particularly well suited to get the communities going on.)

Our resource for this project is The Educated Jew Project, which may be used to give a "language" to the deliberations. This is not the same as setting strategic goals. It is a substantive educational discussion that addresses what at the institutional level -- the single institution, the single principal, the single teacher -- or at the collective level -- the denominational or communal level -- will be the evolving goals for the Jews of each community. This discussion will probably have little impact on the Project in the

beginning. However, goal-setting will be an ongoing process that will call for changes

all the time.

SF: Additionally, we owe the evaluators to list specific, operational goals, as vacuous

as they may be, that have to be agreed upon. For example, is this program committed

to increasing the number of children who go on to high school? Is this program

determined to test achievement in Hebrew?

CONCLUSION:

The Goals Project will contain two tracks: one to develop an overarching vision and

secondly to develop a set of plausible objectives. One aim of the Lead Communities

Project will be to sponsor an ongoing deliberation on goals in the Lead Communities.

We might bring David Hartman, Yitz Greenberg, and Moishe Greenberg together at a

public forum to spark the debate within the denominations of our Lead Communities.

NOTE: No staff person has been assigned either task

ISSUE: FUNDING THE BEST PRACTICES PROJECT

There are five aspects of the Best Practices Project:

1. an examination of the theoretical underpinnings

2. study in the field and the analysis of those examples

theory of diffusion or transfer of findings into the Lead Communities 3.

4. Piloting of this diffusion

Evaluation of the diffusion of Best Practices into the Communities 5.

CONCLUSION:

To the extent that we can offset costs that we would have to incur anyway, we should go after any foundation that will fund work (including projects that are indirectly related to the above) that is germaine and intrinsic to our interests.

ISSUE: COMMUNITY ALLOCATION OF RESOURCES TO THE PROJECT.

Because it is unlikely that the communities will have a full-fledged plan in place by Spring of 1993, which is when most communities do allocations, we would be asking them to do a kind of set-aside, i.e., to set aside a lump sum for the Lead Communities activities with the understanding that those funds would be phased in as the plan is completed.

ISSUE: WHAT IS THE APPROPRIATE BALANCE OF EFFORT IN THIS FIRST YEAR BETWEEN PLANNING AND ACTION IN THE LEAD COMMUNITIES.

DISCUSSION:

JU: Communities work on a year-to-year basis which starts around the holidays, starts winding down in June and not much happens in the summer. From both a planning and an educational point of view these time-building blocks are quite crucial in thinking about what is going to happen. What is the appropriate allocation of effort between now and the Summer of 1993 between planning and action. Between now and the Spring of 1993 the primary effort is on planning and the development of a five-year plan and the start up of a Best Practice.

SF: No. Between now and the spring to get any community to commit itself to what a Lead Community is going to be like and therefore build a five-year plan is to corrupt the process. (However, this was one of the objectives proposed by AH earlier.) THE ISSUE is how do you help a community find out what it wants to do. THE QUESTION IS how to you begin the conversation with the community about an idea. We have an idea. We do not know how to translate it in the three communities. They together are going to teach us how to translate it; they will change the idea; we will change their idea of what their community is. *That's the process*. The planners have to accompany that, they cannot lead it. THE QUESTION IS what runs the process: the concept or the plan? The plan is just the means to the end.

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JU: But if you don't create the means, you won't have the end.

JW: Several elements that we have identified have to coexist and at the same time we have to be realistic about the timeframe. I agree that the most important part of this work is the introduction of a new way of thinking about Jewish education; more important than the technical sophistication of the process. But unless that conversation focuses relatively quickly on "what does this mean in terms of how we organize our educational activities", people will become impatient and begin to lose interest. We have two partial visions of how to proceed. This is ultimately an educational process. What I would rather see us do is identify the critical things that have to get going in a community first without necessarily locking ourselves into what is going to be in place at a specific time.

EG: We have to enable the communities to put processes in place.

CONCLUSION:

We will be operating on several tracks simultaneously: first of all, we are going to try to infuse the community with a vision, with an emphasis on our skills in getting them to articulate their goals. However, we cannot depart from our original aims concerning the enabling processes, two of which are the development of personnel and the involvement of lay leaders.

On a second track, we must get the communities doing something and pilot projects are a way of doing that.

Thirdly, we must develop a plan sometime during the next nine, twelve, or eighteen months. The speed with which this is developed will be different in each community, but there needs to be a timeline. This plan will continually be modified throughout the process.

SUBSEQUENT DISCUSSION INVOLVED PLANNING FOR THE MEETING WITH THE COMMUNITY PLANNERS ON THE FOLLOWING DAY.

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All communities have a powerful lay leadership. We need to approach the inner circle with specific projects within the Lead Communities Project that they can fund; then approach the second circle, and the third circle. All these levels of givers need to be engaged and nourished. In addition, by generating enthusiasm among the lay leadership we can help allay any fears of federation execs about how the success or failure of this Project might affect their position within the community.

CONCLUSION:

Our attention needs to be very focused on maybe half a dozen or so movers and shakers in each community. It will probably include the federation exec, two or three lay people who are heavily involved in the governance of the community and in giving, and probably one or two rabbis. If we get these people with us and involved, the rest will inevitably follow.

CAUTION: We must not fall into the trap of thinking that once we have the key players on board, the hardest part of our work is done. A considerable amount of time and

attention should be given to "courting" other influential individuals in order to develop a truly community-wide base of support. Without this broad base of support we may not be able to move the process along quickly enough to sustain this effort.

ISSUE: GOALS PROJECT: OUR AIM IS TO LAUNCH THIS DISCUSSION ON THE LOCAL LEVEL. HOW IS THIS TO BE DONE?

DISCUSSION:

Perhaps the best way to begin this Project is to start with the denominations and then build to community-wide goals, rather than the other way round. There is a tug of war between those whose vision for a community is essential parallel tracks of Jewish education, each denomination unto its own, and those who would form an overarching vision for the community which does full justice to the integrity and individuality of each denomination.

The MEF Project is now trying to find out what, if any, goals the communities have set. Our role is to help the communities identify their goals and offer them resources; CIJE does not set the goals for them. (This is a discussion that Barry Holtz would be particularly well suited to get the communities going on.)

Our resource for this project is The Educated Jew Project, which may be used to give a "language" to the deliberations. This is not the same as setting strategic goals. It is a substantive educational discussion that addresses what at the institutional level -- the single institution, the single principal, the single teacher -- or at the collective level -- the denominational or communal level -- will be the evolving goals for the Jews of each community. This discussion will probably have little impact on the Project in the

beginning. However, goal-setting will be an ongoing process that will call for changes

all the time.

Additionally, we owe the evaluators to list specific, operational goals, as vacuous as

they may be, that have to be agreed upon. For example, is this program committed to

increasing the number of children who go on to high school? Is this program

determined to test achievement in Hebrew?

CONCLUSION:

The Goals Project will contain two tracks: one to develop an overarching vision and

secondly to develop a set of plausible objectives. One aim of the Lead Communities

Project will be to sponsor an ongoing deliberation on goals in the Lead Communities.

We might bring David Hartman, Yitz Greenberg, and Moishe Greenberg together at a

public forum to spark the debate within the denominations of our Lead Communities.

NOTE: No staff person has been assigned either goal

ISSUE: FUNDING THE BEST PRACTICES PROJECT

There are five aspects of the Best Practices Project:

1. an examination of the theoretical underpinnings

2. study in the field and the analysis of those examples

3. theory of diffusion or transfer of findings into the Lead Communities

4. Piloting of this diffusion

5. Evaluation of the diffusion of Best Practices into the Communities

CONCLUSION:

To the extent that we can offset costs that we would have to incur anyway, we should go after any foundation that will fund work (including projects that are indirectly related to the above) that is germaine and intrinsic to our interests.

ISSUE: THE FIRST YEAR IS TO BE USED IN PLANNING THE FIVE-YEAR PROCESS SO THAT COMMUNITIES CAN HAVE SUFFICIENT TIME TO ALLOCATE RECOURCES TO THE PROJECT.

Because it is unlikely that the communities will have a full-fledged plan in place by Spring of 1993, which is when most communities do allocations, we would be asking them to do a kind of set-aside, i.e., to set aside a lump sum for the Lead Communities activities with the understanding that those funds would be phased in as the plan is completed.

Baltimore is on a course to produce a strategic plan for Jewish education by Spring of 1993. Milwaukee may be able to produce a sketch or an outline by Spring 1993. Atlanta is somewhere in between; they think they have most of the plan done, but in fact don't. They have drawn up a restructing plan but have almost nothing on substance.

ISSUE: WHAT IS THE APPROPRIATE BALANCE OF EFFORT IN THIS FIRST YEAR BETWEEN PLANNING AND ACTION IN THE LEAD COMMUNITIES.

DISCUSSION:

The decision to go with only one pilot project could be disastrous to the Project if it should not turn out to be a success. It would be far better to several pilot projects to insure that there will be a success. While we have to be loose on dates and the number of things we choose to implement, we should not be loose on the kinds of things. We need a lot of time to discuss, interpret, and get things going.



CONCLUSION:

To the extent that we can offset costs that we would have to incur anyway, we should go after any foundation that will fund work (including projects that are indirectly related to the above) that is germaine and intrinsic to our interests.

ISSUE: COMMUNITY ALLOCATION OF RESOURCES TO THE PROJECT.

Because it is unlikely that the communities will have a full-fledged plan in place by Spring of 1993, which is when most communities do allocations, we would be asking them to do a kind of set-aside, i.e., to set aside a lump sum for the Lead Communities activities with the understanding that those funds would be phased in as the plan is completed.

ISSUE: WHAT IS THE APPROPRIATE BALANCE OF EFFORT IN THIS FIRST YEAR BETWEEN PLANNING AND ACTION IN THE LEAD COMMUNITIES.

DISCUSSION:

JU: Communities work on a year-to-year basis which starts around the holidays, starts winding down in June and not much happens in the summer. From both a planning and an educational point of view these time-building blocks are quite crucial in thinking about what is going to happen. What is the appropriate allocation of effort between now and the Summer of 1993 between planning and action. Between now and the Spring of 1993 the primary effort is on planning and the development of a five-year plan and the start up of a Best Practice.

SF: No. Between now and the spring to get any community to commit itself to what a Lead Community is going to be like and therefore build a five-year plan is to corrupt the process. (However, this was one of the objectives proposed by AH earlier.) THE ISSUE is how do you help a community find out what it wants to do. THE QUESTION IS how to you begin the conversation with the community about an idea. We have an idea. We do not know how to translate it in the three communities. They together are going to teach us how to translate it; they will change the idea; we will change their idea of what their community is. *That's the process*. The planners have to accompany that, they cannot lead it. THE QUESTION IS what runs the process: the concept or the plan? The plan is just the means to the end.

JU: But if you don't create the means, you won't have the end.

JW: Several elements that we have identified have to coexist and at the same time we have to be realistic about the timeframe. I agree that the most important part of this work is the introduction of a new way of thinking about Jewish education; more important than the technical sophistication of the process. But unless that conversation focuses relatively quickly on "what does this mean in terms of how we organize our educational activities", people will become impatient and begin to lose interest. We have two partial visions of how to proceed. This is ultimately an educational process. What I would rather see us do is identify the critical things that have to get going in a community first without necessarily locking ourselves into what is going to be in place at a specific time.

EG: We have to enable the communities to put processes in place.

CONCLUSION:

We will be operating on several tracks simultaneously: first of all, we are going to try to infuse the community with a vision, with an emphasis on our skills in getting them to articulate their goals. However, we cannot depart from our original aims concerning the enabling processes, two of which are the development of personnel and the involvement of lay leaders.

On a second track, we must get the communities doing something and pilot projects are a way of doing that.

Thirdly, we must develop a plan sometime during the next nine, twelve, or eighteen months. The speed with which this is developed will be different in each community, but there needs to be a timeline. This plan will continually be modified throughout the process.

SUBSEQUENT DISCUSSION INVOLVED PLANNING FOR THE MEETING WITH THE COMMUNITY PLANNERS ON THE FOLLOWING DAY.

SPE

PLANNING STRATEGY FOR COMMUNITY PLANNERS WORKSHOP November 19-24, 1992

Two days of deliberations raised several important issues. Although conclusions were reached on many, some were left open for future consideration. In some cases, points were raised that may act as quideposts for further discussion or actions.

DAY ONE

ISSUE: WHERE DO WE WANT THE LEAD COMMUNITIES PROJECT TO BE ONE YEAR FROM NOW?

AH and SF brought to the meeting a series of expectations which might be used to judge the success of the first year of the Lead Communities Project. A preliminary list of objectives which should ideally be in some state of implementation by November 1993 includes:

- 4-6 pilot projects in place
- Local Committee for the Project
- A Survey of the Community's Educators
- Best Practices Project
- Monitoring, Evaluation, and Feedback Project
- The establishement of a five-year plan
- Communications, Networking

Public Relations

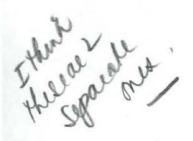
DISCUSSION:

There is a definite need for a timetable but perhaps the timeframe should be adjusted for each community. The question of first year programmatic objectives was left open because there is a very real possiblity that this may be more than a community can accomplish in the space of one year, even with the high levels of enthusiasm and support the Projet has generated. It might be more advisable to draw up a list of sepcific indicators of progress that we will not give up and those which we can allow the communities to hold off on for the moment.

Discussions focused on the fact that American Jewish communities are diverse, complex politial entities. There are certain barriers that exist within each comunity that tend to forstall getting any process moving. The KEY ELEMENT seems to be that we must first engage every single one of the constituencies in the community that have a stake in this Project. Perhaps we also need to determine what is the glue that will hold all of the elements of the community together for the duration of the Project?

CONCLUSION: We want to make sure that whatever the communities do that it is within the context of what we have decided with them fits the particular vision for each community and that if we drop something, it will be in accordance with a framwork that we determine in advance.

ISSUE: There is a need for the communities to engage in community building for the Project and for CIJE to crystalize its role in facilitating the introduction of the Project into the Lead Communities.



OPTION: All communities have a powerful lay leadership. We need to approach the inner circle with specific projects within the Lead Communities Project that they can fund; then approach the second circle, and the third circle. All these levels of givers need to be nourished. Perhaps we should draw up a list of obstacles and determine who will attack them by what date.

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

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

MEMORANDUM

To: File Date: November 30, 1992

From: Art Rotman Re: Lead Communities Planners

Meeting November 23-24, 1992

AMERICAN IEWISH

I asked Jon Woocher for his candid evaluation: He thought that, on the whole, the meetings went very well and that the planners had left feeling much more comfortable about their role in the community and armed with material they could provide to their lay people and staff.

Monday night got off to a "rough start." Nobody knew Seymour and Annette. The amount of material that was presented on the slides was "overwhelming" and it was just too much for them to absorb under the circumstances. There was no opportunity, as Jon feels there should have been, for the community people to react to what was being said. It was difficult for them to see it in context.

Tuesday went much better particularly after Steve Gelfand of Atlanta started off the day by saying that "we" (planners) have to take hold of the day's agenda and make sure it works.

The planners reacted exceptionally favorably to Ukeles' presentation of the Outline of a Planning Guide. This appeared to Jon to be one of the most useful pieces of the meeting. They now feel that they have a "workable game plan."

Jon was struck with the positive feelings about Shulamith and her role in the communities. According to Jon she appears to have been particularly sensitive to the needs of the planners in their work in the community and they like her "hands on" approach.

2

If Jon were doing it over again, he would not have started with the material on Monday, but rather used the time to ask people what they have been doing and what they see as the issues and use that discussion as a basis for determining for Tuesday's agenda. Some of the slide material presented on Monday night could have been used on Tuesday, but not all of it and not in such detail. Jon guesses that as a result of this experience, Seymour and Annette now realize that working with this group of pros is quite different from making a presentation to a large body such as the Commisssion of lay people.



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

MEMORANDUM

TO: Participants in Lead Communities

DATE:

December 1, 1992

Planners Workshop 11/23-24/92

FROM: Art Rotman

SUBJECT: Record of Decisions

The following is a list of decisons agreed to by participants in the planning workshop. A full set of minutes is being prepared.

- CIJE will draft a pilot projects plan for working with the Lead Communities, 1. including open dates and questions for completion by Lead Communities.
- 2. CIJE will provide Lead Communities with the following:
 - A paper will be prepared on Best Practices which will include descriptions of Best Practices. It will also list steps for introducing the Best Practices Project to the Lead Communities within three weeks.
 - A Planning Guide to assist communities in developing a five-year strategic plan and a first-year acton plan.
 - A list of names, addresses, and telephone numbers of workshop particpants and other resource people.
- 3. CIJE will set up a conference call for the Lead Communities and CIJE staff to begin planning the next steps.
- 4. The three communities will work together to identify at least one common pilot project that each will develop in the near future.
- 5. A meeting of this group, possibly to include the communities' lay leadership. will be planned for April 24 to coincide with the CJF Quarterly.
- 6. It was proposed that one or more CIJE Board members meet with local lay leaders.
- 7. CIJE and JESNA will prepare an inventory of current initiatives in Jewish education which might be of use to Lead Communities in their planning.
- 8. CIJE will seriously consider the possibility of providing up to \$40,000 toward funding a position in each Lead Community to facilitate the planning process.

DRAFT 12/1/92

HLZ - I prepared this following the NY meeting in Nov. Some variation was sent by AR to participants.

MEMO TO:

Participants in Lead Communities Planning Workshop

of November 23-24, 1992

FROM:

Virginia F. Levi

DATE:

December 1, 1992

SUBJECT:

Record of Decisions

The following is a list of decisions agreed to by participants in the planning workshop. A full set of minutes is being prepared. It was the sense of the participants that a quick turnaround on this list would be helpful.

american Jewish

- CIJE will draft a pilot projects plan for working with the Lead
 Communities, including open dates and questions for completion by Lead
 Communities.
- 2. CIJE will provide Lead Communities with the following:
 - a. A paper on Best Practices including actual descriptions of Best Practices prepared for the project. This will include steps for introducing the Best Practices to the Lead Communities--within three weeks.
 - b. Planning guide to assist communities in developing a five-year strategic plan and a first-year action plan.
 - c. The three communities will work together in an effort to identify at least one common pilot project which can be undertaken in all three communities in the near future.

- d. A meeting of this group, possibly to include lay leaders from the communities, will be planned for April 24, to coincide with the CJF Quarterly.
- e. CIJE will prepare a list of names, addresses and telephone numbers of participants in this workshop and other resource people.
- f. A conference call will be set up by CIJE for the Lead Communities and CIJE staff to begin planning next steps.
- It was proposed that one or more CIJE board members meet with local lay leaders.
- 4. CIJE and JESNA will prepare an inventory of initiatives in Jewish education currently under way which might be of use to Lead Communities in their planning.
- CIJE will consider seriously the possibility of providing up to \$40,000 toward funding a position in each Lead Community to facilitate the planning process.

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AH EG-

MEMORANDUM

TO:

Steve Gelfand

Marshall Levin

Howard Neistein

FROM: Art Rotman

DATE:

December 4, 1992

SUBJECT:

Meeting Notes

This is a draft. Please make any changes you feel are warranted.

For obvious reasons, I would appreciate your sending me your approval and/or suggestions by fax.

DEC 09 '92 10:43 AM

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

CIJE

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

441300

SRF

MEMORANDUM

TO:

Steve Gelfand

DATE:

December 4, 1992

Marshall Levin

Howard Neistein

FROM:

Art Rotman

SUBJECT: Meeting Notes

This is a draft. Please make any changes you feel are warranted.

For obvious reasons, I would appreciate your sending me your approval and/or suggestions by fax.

Post-It™ brand fax transmittal	memo 7671 # of pages > 2
To GINNY Levi	Co.
Dept.	Phone #
Fax#	Fax #

PREMIEH INDUSTHIAL COHPORATION NUMBER OF FACSIMILE HEADER SHEET DATE: 12/8 TIME:____ PAGES SENT: 73138 (5/90) PRINTED IN U.S.A TO: FAX NO. 6/2) 2/3 - 4078 FROM: FAX NO. (2/4) 36/ - 9962 Name GINNY CEV) Name SHULAMITH ELSTER Company . Company Tele. No. (Ext. Street Address Does be work of City State Zip Country Dear Shulamith, Here's a draft of the minutes. Plane check the spellings of participants' names, since I didn't have them all. 'also, please run these by AR, if necessary. fice then send them ant? Well you guys sent out the list of key points, I assume, but I didn't receive a logy. I'd be interested in seeing how they were changed, if at all, and what sort of cover note went with them Thanks a lot.

Mailing Address: 163 Third Avenue #128 Phone: (212) 532-1961 New York, NY 10003 FAX: (212) 213-4078

TELEFAX

TO:

Ginny Levi

DATE: December 8, 1992

FROM: Jo Ann Schaffer

FAX #: (216) 361-9962

Number of pages (including this sheet) __9__

MESSAGE:

AMERICAN JEWISH

SHULAMITH HAS MADE THE FOLLOWING CHANGES AND THEY HAVE BEEN APPROVED BY ART.

REGARDS.

JO.

DRAFT 12/8/92

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

MINUTES:

Lead Communities Planning Workshop

DATE OF MEETING:

November 23-24, 1992

DATE MINUTES ISSUED: December

ecember 1992

PARTICIPANTS:

Lauren Azoulai, Chaim Botwinick, Shulamith Elster, Seymour Fox, Steven Gelfand, Roberta Goodman, Annette Hochstein, Barry Holtz, Nancy Kutler, Marshallevin, Daniel Marom, James Meier, Howard Neistein, Arthur Rotman, Claire Rottenberg, Julie Tammivaara, Jack Ukeles, Jonathon Woocher, Shmuel Wygoda, Virginia

Levi (Sec'y)

I. Welcome and Introductions

The meeting opened with the introduction of participants and welcoming remarks by Arthur Rotman, Executive Director of CIJE. Mr. Rotman reviewed the agenda and noted the importance of the Lead Communities in implementing the recommendations of the Commission on Jewish Education in North America.

Representatives of the three communities were then asked to provide brief sketches of their work in Jewish education as a context for further discussion.

A. Atlanta

Atlanta has a growing Jewish population. In the early '80s

Atlanta conducted a demographic study of the local Jewish

community, followed by the development of a strategic plan.

Included was a recommendation to reorganize the services of the

Bureau of Jewish Education, reassigning functional responsibility

to other appropriate agencies. Atlanta has five day schools. It

is working with the CRB Foundation on the development of Israel experience programs, has a Commission on Jewish Continuity, and has recently established a Jewish Education Fund.

B. Baltimore

Baltimore has a stable Jewish population of 92,000. A two-year planning initiative concluded in 1990 with a series of recommendations including the need to increase funding for Jewish education (has been increased from 25% to 33%) and the establishment of a commission to look at the local Jewish education system, now in its third year. Outcomes include a strategic plan for Jewish education and the establishment of a Fund for Jewish Education which is currently undertaking a \$10 million campaign. Day and supplementary schools are beginning to work together to provide training for educators and to establish a fund for Israel experience programs. A team of synagogue representatives is working together to develop a program of Jewish family education.

C. Milwaukee

With a population of 28,000, Milwaukee has four day schools in addition to an array of camps and pre-school opportunities.

Twenty-five percent of the community affiliates with the JCC.

Community strengths include the centrality of the federation, the availability of scholarships for day schools and a common cost

for each day school, and coordination of teen programming. The cost of Jewish education is a central issue in a community where average incomes are relatively low. The community must also contend with a shortage of trained personnel and a 15% decline in campaign income over the last three years. A Jewish Education Task Force was established in July 1991 and has developed a plan for the revision of use of the Central Agency for Jewish Education. A broad-based commission on Jewish education is now being established. It should be noted that for many years Milwaukee has taken the lead in putting Jewish education high on its communal agenda and funding it accordingly.

II. Lead Communities: A Concept and its Implementation

- A. Annette Hochstein noted that the following principles had guided the work of the Commission on Jewish Education in North America:
 - Local, continental, and international resources must work together to support Jewish education.
 - 2. Jewish education has multiple constituencies and venues. The Commission concluded that the best way to approach Jewish education would be to focus on two necessary conditions for change:
 - a. Personnel -- recruitment, training, benefits and placement to build a cadre of well-trained Jewish educators.

- b. Community support -- the need to engage top community leadership in personal commitment and financial support for Jewish education.
- It will be important to engage a community "across the board" in its commitment to Jewish education.
- 4. The best way to learn what will work is by doing it. Because education takes place at the local level, we must engage local communities in the effort to improve and develop Jewish education. This led to the concept of Lead Communities.
- 5. It was concluded that Jewish education must be raised to a level which permits it to compete with the many alternatives available. This can best be accomplished by bringing local and continental resources together, by working intensively in limited settings, by working through programs, and by constantly monitoring, evaluating, and providing feedback.

B. The Task Ahead

Mrs. Hochstein suggested a list of possible actions, some of which should be under way within the next year. This reflects the sense that communities wish to see concrete signs of progress as early as possible. One or more of the following should be undertaken as the community proceeds with the planning process.

- Pilot projects to be undertaken in personnel and community
 mobilization. In an effort to mobilize local top leaders,
 CIJE proposes to bring a member of its board to begin an
 ongoing dialogue with them on the Lead Communities project and
 its educational endeavors
- Establishment of a local commission with broad representation, staff support, possible subcommittees or task forces and the possibility of one or several concrete products at the end of the first year.
- Conduct a survey of educators to establish the current situation as a basis for ascertaining training and staffing needs.
- Select one or two areas of Best Practices for early implementation e.g., supplementary school and early childhood, develop a plan and begin to work.
- Proceed with the design and work of monitoring, evaluation, and feedback.
- Draft a five-year plan with the assistance of a detailed guide to be provided by CIJE.

Establish lines of communication among CIJE, the Lead
 Communities, and the continental community.

This presentation concluded the evening portion of the meeting. The group reconvened on Tuesday, November 24.

III. Introductory Remarks

As the morning session opened, it was noted that the Lead Communities hoped to resolve the following in the near future:

Steve Geefart

- A. Believing that the communities can be more effective working together than on their own, they seek agreement on common goals and approaches to achieving those goals.
- B. The communities need clarity on lines of communication and whom to talk with about various issues.
- C. While acknowledging that the communities are "in this together," it was noted that not all community interests or needs will be the same. It will be useful to clarify where there are common interests and where they diverge.
- D. It would be helpful to clarify, understand, and agree to goals and objectives for the planning process.

- E. Clarity of direction will help workshop participants to return home ready to work with community leadership and move ahead.
- F. The communities need CIJE to be involved beyond the role of convener. They seek help with planning, content, and access to seed money with which to move ahead. CIJE should ease the way for communities to raise local money.

AMERICAN IEWISH

G. The communities seek one programmatic initiative on which all can agree and move forward quickly to implementation.

These goals served as a backdrop for the day's discussion.

IV. Central Elements

As the central elements--building the profession and mobilizing community support--were discussed, participants were asked to consider principles on which to proceed.

Following discussion, it was suggested that certain common themes might be seen as principles:

- A. The personnel issues cuts across all areas of Jewish education.
- B. There is need a master plan.

- C. The role of resources in impacting Jewish education must be considered.
- D. In order to have an impact, there must be broad based buy-in to the importance of upgrading personnel.

In the discussion that followed it was noted that the Lead Communities provide a context in which to consider these issues systematically. It will be important to establish criteria on which to judge the impact of the various approaches. It was noted that the communities will rely on CIJE for help with evaluation. It was also suggested that lay leaders should be involved in defining the evaluation process.

It was noted that it will be difficult to garner lay support for approaches that cannot be evaluated, but that funders are likely to support what they see as a "reasonable gamble." With this in mind, an approach to be considered would be the identification of a project which can be undertaken and evaluated in the development of personnel, perhaps with a focus on senior personnel.

V. The Role of CIJE

A. Best Practices and Consultation

Barry Holtz outlined the work he has undertaken over the past 18 months to identify areas for study followed by the development of

an inventory of Best Practices to provide models of excellence for introduction into Lead Communities. Best Practices research is being undertaken in the following areas:

1. The Supplementary School

This area was begun first and is nearly ready for use in the Lead Communities. A team of experts has identified nine successful supplementary school programs, has conducted site visits, and has submitted reports on these exemplary programs.

2. Early Childhood Jewish Education

This is being looked at in the variety of settings in which early childhood education occurs. Reports are being submitted on exemplary programs.

3. The JCC

Each Lead Community has a JCC. The JCCA staff will visit each of the three to evaluate what is going well in Jewish education and where they recommend change. At the same time, outside experts will identify 8-9 JCCs which are most effective in the area of Jewish education and Jewish continuity. These programs will be explored and evaluated for use by the Lead Communities.

4. Israel Experience

We are working with the CRB Foundation, which is particularly interested in this area and has developed materials for it.

5. Day Schools

We have begun to take the first steps into this important area, and to develop a methodology specific to it.

Still to do:

6. Jewish Camping

7. College Campus

8. Adult Jewish Education not on the publish list

inhoduce

CIJE will work closely with the Lead Communities to determine how to take a practice from one setting and apply it in another.

It was noted that while the communities are engaged in the planning process, it might be useful to work toward implementation of a Best Practices approach. Holtz will have materials on the supplementary school to the Lead Communities within several weeks. Following their submission, he and his staff will be Concultated available to meet with community leaders to discuss areas of

interest and means of implementation. The Best Practices might also be an appropriate framework for the development of a pilot project during the initial year.

It was suggested that in order to introduce the Best Practices project to the communities, Holtz would be invited to meet with local lay and professional leadership.

It was suggested that another area in which communities might be ready to move ahead relatively quickly is that of the Israel experience. It was noted that the CIJE has promised to outline for the CRB Foundation a proposal for the Israel experience in the Lead Communities.

B. Foundation Relations

It was reported that CIJE is in contact with several foundations, both Jewish and general, for support of work in the Lead Communities. In addition, CIJE staff is available to help Lead Communities in their approaches to local foundations. It was suggested that CIJE will be working with the Lead Communities to determine how best to proceed with their foundation development work.

It was suggested that there are initiatives under way in other cities which might be applicable in the Lead Communities. It was

proposed that JESNA prepare an inventory of such initiatives and make it available to the Lead Communities.

VI. Work Plan -- Year One

A. Planning Process

Jack Ukeles reported that a planning guide is being prepared for use by the three communities. It is anticipated that the planning process will yield a five-year strategic plan and a specific action plan for the first year.

The proposed planning process includes the following seven steps:

1. Start-up

--- formulation of a commission; undertake to inform and involve stakeholders (e.g., community lay leaders, educators, rabbis, congregational leadership, etc.).

2. Self-study

- -- inventory and profile of educational system.
- -- assessment of strengths and weaknesses.
- -- analysis of personnel.

3. Identification of critical issues

-- community moves from the general to the specific with strategic choices.

4. Development of mission or vision statement

5. Define priorities

-- major strategic recommendations with priority rankings and sequences.

6. Design programs

- -- specific programmatic interventions.
- .. new initiatives.

7. Determine strategy to develop resources for implementation

A question was raised regarding the amount of time the planning process would require and how it might be meshed with the local federation allocation process. It was noted that funds can be set aside for anticipated projects, making this a less significant issue.

All three communities expressed concern over the need for staff support of the planning process at a time when "flat campaigns" and local reluctance to add to federation staff make this difficult. It was suggested that if the first request to local lay leadership is to fund "Support this might impact negatively on the buy-in process. In light of the above, it was suggested that CIJE consider providing up to \$40,000 per year for three years toward funding of a position. It was agreed that this proposal would be seriously considered by CIJE.

B. Introducing the Project into the Community

It was suggested that the first step is to define the community.

The following list of constituencies was developed:

- 1. Educators and senior educators
- 2. Rabbis

Lay leaders -- of general community and individual institutions

- 4. Parents and learners
- 5. Professionals at federation and other relevant agencies
- 6. Publics: the media and other communities

It was noted that it will be important to communicate with all of these groups. One way to do this at the local level is for the commission process to include well-publicized open meetings at which anyone in the community could be heard. In addition to making the local commission as representative as possible and extending involvement through task forces, a community might wish to hold focus groups to encourage a stronger sense of involvement.

PAGE.18

It was suggested that local leaders will buy in more completely when they see evidence of action. One successful project would go a long way toward accomplishing this goal.

To help the communities get up and running, CIJE will work with the local communities to provide the following:

- 1. Core materials
 - a. Best Practices papers
 - b. Planning guide
 - c. Timetable
 - d. Press releases
- Support for the planning and evaluation processes at a local level.
- Assistance in quick start-up of at least one project, including funding support and/or assistance in finding that support.
- Materials for use with focus groups.
- A list of participants in this meeting and others who can be helpful to the communities in moving forward.

VII. Next Steps

A. It was agreed that goals and agendas for future meetings of this group will be set jointly. In the interim, Shulamith Elster will serve as a clearinghouse for distributing materials among the Lead Communities and CIJE. Consideration will be given to holding a conference call as a follow-up to this meeting and a means of generating a project for early implementation.

AMERICAN IEWISH

- B. A meeting of this group, possibly to include lay leaders from the communities, will be planned for April 24, to coincide with the CJF Quarterly in Washington, D.C.
- C. It was suggested that one or more CIJE board members plan to meet with local lay leaders early in 1993. Perhaps a kick-off celebration might occur at the same time.
 - A paper on Best Practices in supplementary schools and steps for introducing Best Practices to the Lead Communities will be BEING PREPARED.

VIII. Conclusion

The meeting concluded with a sense of hope and expectancy for the future. There was the sense that with ongoing communication and the shared mission of contributing to Jewish continuity for all of North America, the next several years should be exciting and productive.

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MEMORANDUM

TO:

Mort Mandel

Chuck Ratner

DATE:

December 9, 1992

FROM:

Art Rotman

SUBJECT:

Lead Communities Planners

Meeting

Attached is a draft of the key points of our meeting with the Planners of the three Lead Communities on November 23-24.

Participants at the meetings included:

Lauren Azoulai (Atlanta)
Chaim Botwinick (Baltimore)
Shulamith Elster
Seymour Fox
Steve Gelfand (Atlanta)
Roberta Goodman (Field Researcher)
Annette Hochstein
Barry Holtz (Best Practices)
Nancy Kutler (Baltimore)
Marshall Levin (Baltimore)

Daniel Marom (Mandel Institute)
Jim Meier (Ukeles Assoc.)
Howard Neistein (Milwaukee)
Art Rotman
Claire Rottenberg (Field Researcher)
Julie Tammivaara (Field Researcher)
Jack Ukeles (Ukeles Assoc.)
Jon Woocher
Shmuel Wygoda (Mandel Institute)

LEAD COMMUNITY PLANNERS WORKSHOP November 23-24, 1992

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Excerpts from Minutes of Lead Communities Planning Workshop

November 23-24, 1992

Participants:

Lead Community Planners, CIJE Staff and Consultants: Lauren Azoulai, Chaim Botwinick, Shulamith Elster, Seymour Fox,

Steven Gelfand, Roberta Goodman, Annette Hochstein, Barry Holtz, Nancy Kutler, Marshall Levin, Daniel Marom, James Meier, Howard Neistein, Arthur Rotman, Claire Rottenberg, Julie Tammivaara, Jack

Ukeles, Jonathan Woocher, Shmuel Wygoda, Virginia Levi

I. The Lead Communities - Atlanta, Baltimore and Milwaukee

Representatives of the three communities provided brief sketches of their work in Jewish education as a context for further discussion.

A. Atlanta

Atlanta has a growing Jewish population. In the early '80s, Atlanta conducted a demographic study of the local Jewish community, followed by the development of a strategic plan. Included was a recommendation to reorganize the services of the Bureau of Jewish Education, reassigning functional responsibility to other appropriate agencies. Atlanta has five day schools. It is working with the CRB Foundation on the development of Israel experience programs, has a Commission on Jewish Continuity, and has recently established a Jewish Education Fund.

B. Baltimore

Baltimore has a stable Jewish population of 92,000. A two-year planning initiative concluded in 1990 with a series of recommendations including the need to increase funding for Jewish education (has been increased from 25% to 33%) and the establishment of a commission to look at the local Jewish education system, now in its third year. Outcomes include a strategic plan for Jewish education and the establishment of a Fund for Jewish Education which is currently undertaking a \$10 million campaign. Day and supplementary schools are beginning to work together to provide training for educators and to establish a fund for Israel experience programs. A team of synagogue representatives is working together to develop a program of Jewish family education.

Lead Communities Planning Workshop November 23-24, 1992

C. Milwaukee

With a population of 28,000, Milwaukee has four day schools in addition to an array of camps and pre-school opportunities. Twenty-five percent of the community affiliates with the JCC. Community strengths include the centrality of the federation, the availability of scholarships for day schools and a common cost for each day school, and coordination of teen programming. The cost of Jewish education is a central issue in a community where average incomes are relatively low. The community must also contend with a shortage of trained personnel and a 15% decline in campaign income over the last three years. A Jewish Education Task Force was established in July, 1991, and has developed a plan for the revision of use of the Central Agency for Jewish Education. A broad-based commission on Jewish education is now being established. It should be noted that for many years, Milwaukee has taken the lead in putting Jewish education high on its communal agenda and funding it accordingly.

II. Lead Communities: A Concept and its Implementation

- A. Annette Hochstein reviewed the following principles that guided the work of the Commission on Jewish Education in North America:
 - Local, continental, and international resources must work together to support Jewish education.
 - Jewish education has multiple constituencies and venues. The Commission concluded that the best way to approach Jewish education would be to focus on two necessary conditions for change:
 - a. <u>Personnel</u> -- recruitment, training, benefits and placement to build a cadre of well-trained Jewish educators.
 - Community support -- the need to engage top community leadership in personal commitment and financial support for Jewish education.
 - It will be important to engage a community "across the board" in its commitment to Jewish education.
 - 4. The best way to learn what will work is by doing it. Because education takes place at the local level, we must engage local communities in the effort to improve and develop Jewish education. This led to the concept of Lead Communities.

5. It was concluded that Jewish education must be raised to a level which permits it to compete with the many alternatives available. This can best be accomplished by bringing local and continental resources together, by working intensively in limited settings, by working through programs, and by constantly monitoring, evaluating, and providing feedback.

B. The Task Ahead

Mrs. Hochstein suggested a list of possible actions, some of which should be under way within the next year. This reflects the sense that communities and the CIJE wish to see concrete signs of progress as early as possible. One or more of the following should be undertaken as the community proceeds with the planning process.

- Pilot projects to be undertaken in personnel and community mobilization.
 In an effort to mobilize local top leaders, CIJE proposes to bring a member
 of its board to begin an ongoing dialogue with them on the Lead
 Communities project and its educational endeavors.
- Establishment of a local commission with broad representation, staff support, possible subcommittees or task forces and the possibility of one or several concrete products at the end of the first year.
- Conduct a survey of educators to establish the current situation as a basis for ascertaining training and staffing needs.
- Select one or two areas of Best Practices for early implementation, e.g., supplementary school and early childhood, develop a plan and begin to work.
- 5. Proceed with the work of monitoring, evaluation, and feedback.
- Draft a five-year plan.
- Establish lines of communication among CIJE, the Lead Communities, and the continental community.

III. Central Elements

The central elements--building the profession and mobilizing community support--were discussed.

- A. The personnel issues cut across all areas of Jewish education.
- B. There is need for a master plan.
- C. The role of resources in impacting Jewish education must be considered.
- D. In order to have an impact, there must be broad based "buy-in" to the importance of upgrading personnel.

It was noted that the Lead Communities provide a context in which to consider these issues systematically. It will be important to establish criteria on which to judge the impact of the various approaches. It was noted that the communities will rely on CIJE for help with evaluation. It was also suggested that lay leaders should be involved in defining the evaluation process. (Refer to Gamoran paper.)

It was noted that it will be difficult to garner lay support for approaches that cannot be evaluated, but that funders are likely to support what they see as a "reasonable gamble." With this in mind, an approach to be considered would be the identification of a project which can be undertaken and evaluated in the development of personnel, perhaps with a focus on senior personnel.

IV. The Role of CIJE

A. Best Practices and Consultation

Barry Holtz outlined the work he has undertaken over the past 18 months to identify areas for study followed by the development of an inventory of Best Practices to provide models of excellence for introduction into Lead Communities. (Refer to Holtz paper.) Best Practices research is being undertaken in the following areas:

- 1. The Supplementary School
- 2. Early Childhood Jewish Education
- The JCC
- 4. Israel Experience

- 5. Day Schools
- 6. Jewish Camping
- 7. College Campus

CIJE will work closely with the Lead Communities to determine how to introduce a successful practice from one setting to another.

It was noted that while the communities are engaged in the planning process, it might be useful to work toward implementation of a Best Practices approach. Holtz and the educators working on the project will be available to meet with community leaders to discuss areas of interest and means of implementation. The Best Practices might also be an appropriate framework for the development of a pilot project during the initial year.

It was suggested that in order to introduce the Best Practices project to the communities, Holtz would be invited to meet with local lay and professional leaders.

B. Foundation Relations

It was reported that CIJE is in contact with several foundations, both Jewish and general, for support of work in the Lead Communities. In addition, CIJE staff is available to help Lead Communities in their approaches to local foundations. It was suggested that CIJE will be working with the Lead Communities to determine how best to proceed with their foundation development work.

It was suggested that there are initiatives under way in other cities which might be applicable in the Lead Communities. It was proposed that JESNA prepare an inventory of such initiatives and make it available to the Lead Communities.

V. Work Plan -- Year One

A. Planning Process

It is anticipated that the planning process will yield a five-year strategic plan and a specific action plan for the first year.

B. Introducing the Project into the Community

It was noted that it will be important to communicate with all of the following groups:

- 1. Educators and senior educators
- 2. Rabbis
- 3. Lay leaders -- of general community and individual institutions
- 4. Parents and learners
- 5. Professionals at federation and other relevant agencies
- 6. Publics: the media and other communities

One way to do this at the local level is for the commission process to include well-publicized open meetings at which anyone in the community could be heard. In addition to making the local commission as representative as possible and extending involvement through task forces, a community might wish to hold focus groups to encourage a stronger sense of involvement.

It was suggested that local leaders will buy in more completely when they see evidence of action. One successful pilot project would go a long way toward accomplishing this goal.

CIJE will work with the local communities and provide the following:

1. Core materials

- a. Best Practices papers
- b. Planning guide
- c. Timetable
- d. Press releases

- 2. Support for the planning and evaluation processes at a local level.
- Assistance in quick start-up of at least one project, including funding support and/or assistance in finding that support.

VI. Conclusion

The meeting concluded with a sense of hope and expectancy for the future. There was the sense that with ongoing communication and the shared mission of contributing to Jewish continuity for all of North America, the next several years should be exciting and productive.



COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

MINUTES:

Lead Communities Planning Workshop

DATE OF MEETING:

November 23-24, 1992

DATE MINUTES ISSUED: December 9, 1992

PARTICIPANTS:

Lauren Azoulai, Chaim Botwinick, Shulamith Elster, Seymour Fox, Steven Gelfand, Roberta Goodman, Annette Hochstein, Barry Holtz, Nancy Kutler, Marshall Levin, Daniel Marom, James Meier, Howard Neistein, Arthur Rotman, Claire Rottenberg, Julie Tammivaara, Jack Ukeles, Jonathon Woocher, Shmuel Wygoda, Virginia

Levi (Sec'y)

Welcome and Introductions

The meeting opened with the introduction of participants and welcoming remarks by Arthur Rotman, Executive Director of CIJE. Mr. Rotman reviewed the agenda and noted the importance of the Lead Communities in implementing the recommendations of the Commission on Jewish Education in North America.

Representatives of the three communities were then asked to provide brief sketches of their work in Jewish education as a context for further discussion

A. Atlanta

Atlanta has a growing Jewish population. In the early '80s Atlanta conducted a demographic study of the local Jewish community, followed by the development of a strategic plan. Included was a recommendation to reorganize the services of the Bureau of Jewish Education, reassigning functional responsibility to other appropriate agencies. Atlanta has five day schools. It is working with the CRB Foundation on the development of Israel experience programs, has a Commission on Jewish Continuity, and has recently established a Jewish Education Fund.

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Baltimore has a stable Jewish population of 92,000. A two-year planning initiative concluded in 1990 with a series of recommendations including the need to increase funding for Jewish education (has been increased from 25% to 33%) and the establishment of a commission to look at the local Jewish education system, now in its third year. Outcomes include a strategic plan for Jewish education and the establishment of a Fund for Jewish Education which is currently undertaking a \$10 million campaign. Day and supplementary schools are beginning to

5. It was concluded that Jewish education must be raised to a level which permits it to compete with the many alternatives available. This can best be accomplished by bringing local and continental resources together, by working intensively in limited settings, by working through programs, and by constantly monitoring, evaluating, and providing feedback.

B. The Task Ahead

Mrs. Hochstein suggested a list of possible actions, some of which should be under way within the next year. This reflects the sense that communities wish to see concrete signs of progress as early as possible. One or more of the following should be undertaken as the community proceeds with the planning process.

- Pilot projects to be undertaken in personnel and community mobilization. In an effort to mobilize local top leaders, CIJE proposes to bring a member of its board to begin an ongoing dialogue with them on the Lead Communities project and its educational endeavors.
- Establishment of a local commission with broad representation, staff support, possible subcommittees or task forces and the possibility of one or several concrete products at the end of the first year.
- Conduct a survey of educators to establish the current situation as a basis for ascertaining training and staffing needs.
- Select one or two areas of Best Practices for early implementation e.g., supplementary school and early childhood, develop a plan and begin to work.
- Proceed with the design and work of monitoring, evaluation, and feedback.
- Draft a five-year plan with the assistance of a detailed guide to be provided by CIJE.
- Establish lines of communication among CIJE, the Lead Communities, and the continental community.

This presentation concluded the evening portion of the meeting. The group reconvened on Tuesday, November 24.

III. Introductory Remarks

As the morning session opened, Steve Gelfand of Atlanta noted on behalf of the three communities that the Lead Communities hoped to resolve the following in the near future: will rely on CIJE for help with evaluation. It was also suggested that lay leaders should be involved in defining the evaluation process.

It was noted that it will be difficult to garner lay support for approaches that cannot be evaluated, but that funders are likely to support what they see as a "reasonable gamble." With this in mind, an approach to be considered would be the identification of a project which can be undertaken and evaluated in the development of personnel, perhaps with a focus on senior personnel.

V. The Role of CIJE

A. Best Practices and Consultation

Barry Holtz outlined the work he has undertaken over the past 18 months to identify areas for study followed by the development of an inventory of Best Practices to provide models of excellence for introduction into Lead Communities. Best Practices research is being undertaken in the following areas:

1. The Supplementary School

This area was begun first and is nearly ready for use in the Lead Communities. A team of experts has identified nine successful supplementary school programs, has conducted site visits, and has submitted reports on these exemplary programs.

2. Early Childhood Jewish Education

This is being looked at in the variety of settings in which early childhood education occurs. Reports are being submitted on exemplary programs.

3. The JCC

Each Lead Community has a JCC. The JCCA staff will visit each of the three to evaluate what is going well in Jewish education and where they recommend change. At the same time, outside experts will identify 8-9 JCCs which are most effective in the area of Jewish education and Jewish continuity. These programs will be explored and evaluated for use by the Lead Communities.

4. Israel Experience

We are working with the CRB Foundation, which is particularly interested in this area and is developing an approach.

5. Day Schools

We have begun to take the first steps into this important area, and to develop a methodology specific to it.

The proposed planning process includes the following seven steps:

1. Start-up

-- formulation of a commission; undertake to inform and involve stakeholders (e.g., community lay leaders, educators, rabbis, congregational leadership, etc.).

Self-study

- -- inventory and profile of educational system.
- -- assessment of strengths and weaknesses.
- -- analysis of personnel.

3. Identification of critical issues

- -- community moves from the general to the specific with strategic choices.
- 4. Development of mission or vision statement

5. Define priorities

-- major strategic recommendations with priority rankings and sequences.

6. Design programs

- -- specific programmatic interventions.
- -- new initiatives.

7. Determine strategy to develop resources for implementation

A question was raised regarding the amount of time the planning process would require and how it might be meshed with the local federation allocation process. It was noted that funds can be set aside for anticipated projects, making this a less significant issue.

All three communities expressed concern over the need for staff support of the planning process at a time when "flat campaigns" and local reluctance to add to federation staff make this difficult. It was suggested that if the first request to local lay leadership is to fund staff, this might impact negatively on the buy-in process. In light of the above, it was suggested that CIJE consider providing up to \$40,000 per year for three years toward funding of a position. It was agreed that this proposal would be seriously considered by CIJE.

- 4. Materials for use with focus groups.
- A list of participants in this meeting and others who can be helpful to the communities in moving forward.

VII. Next Steps

- A. It was agreed that goals and agendas for future meetings of this group will be set jointly. In the interim, Shulamith Elster will serve as a clearinghouse for distributing materials among the Lead Communities and CIJE. Consideration will be given to holding a conference call as a follow-up to this meeting and a means of generating a project for early implementation.
- B. A meeting of this group, possibly to include lay leaders from the communities, will be planned for April 24, to coincide with the CJF Quarterly in Washington, D.C.
- C. It was suggested that one or more CIJE board members plan to meet with local lay leaders early in 1993. Perhaps a kick-off celebration might occur at the same time.
- D. A paper on Best Practices in supplementary schools and steps for introducing Best Practices to the Lead Communities is now being prepared.

VIII. Conclusion

The meeting concluded with a sense of hope and expectancy for the future. There was the sense that with ongoing communication and the shared mission of contributing to Jewish continuity for all of North America, the next several years should be exciting and productive.

LAUNCH OF LEAD COMMITTEES: WORKPLAN (as of September 22, 1992)

TASK	RESPONSIBILITY	START DATE	END DATE	SEPT OCT NOV DEC	ISSUES
LETTER OF UNDERSTANDING Draft #1 Draft #2 Negotiation Final Signing	UIA (Ukeles) UIA (Ukeles) Elster, Ukeles,Rotman UIA Rotman				
PLANNING GUIDELINES • Draft #1 • Draft #2 • Dialogue • Final	UIA (Meier) UIA UIA, Elster	AMERI A R C	CAN JEW	ISH F S	
PRESENT TO COMMUNITIES • GA • Local Events					Social, Inspirational, content mix? Publics?
CIJE STAFF COORDINATION • Executive Staff • Proj. Directors	Rotman Rotman	13		5/	• Frequency?
BEST PRACTICES • Design • Inform • Access	Elster, Holtz Elster Elster				

TASK	RESPONSIBILITY	START DATE	END DATE	SEPT OCT NOV DEC	ISSUES
COMMUNICATION & PR • Identify Publics • Develop Specifics • Initial Annuncement	Elster				
TALENT BANK • Assign Responsibility • Design • Locate Individuals • Iform • Access					Integrate with Best Practices?
COMMUNITY PLANNING PROCESS Seminar Networking	Ukeles, Elster	AMERIC	AN JEWIS	н	•Timing, content, invitees?
LIAISON TO NAT'L RESOURCES IHJL Organizations Denominations	Elster	ARC	HIVE		· ·
FINANCIAL RESOURCES •Nat'l Foundations • Local Found. & Ind.	Naparstek	133	10/1		
VISION PROJECT?		1		1997,399	Community Link?
MONITORING Introduce Develop Feedback Loop Set Terms for first report	Gamoran Goldring				

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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MEMORANDUM

TO:

Shmuel Wygoda

DATE:

January 5, 1993

FROM:

Shulamith Elster

SUBJECT: Agenda/Materials

- To recap, I await your fax/call regarding the following items: 1.
 - Sara Lee's request
 - b. April 24/25 Quarterly
 - c. Atlanta's request for Claire's services
 - Reactions to proposed materials for Advisors meeting
- 2. Attached to this memorandum is an edited version-excerpts of the minutes of the Planners Workshop.
- I also propose to send the Gamoran paper which is sub-titled "A Three Year 3. Outline." Since you are meeting tomorrow with Ellen, you could help me. Ask her to comment on the appropriateness of this paper for the group. I have asked her to attend the meeting and bring one of the researchers - Roberta would be my preference. She and I will discuss details of this when she returns to the U.S.
- The sections of Lead Communities at Work (August 12), which I want to edit and 4. think appropriate are: A, B, C, D, E, F (only listing of #1-5 without text because these will be covered in presentations and other papers), G, and H (edited).
- When we speak next we can discuss how to present the update and progress 5. report on Lead Communities.

Attachments:

Minutes of Planners Workshop: annotated