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Series C: Council for Initiatives in Jewish Education (CIJE). 1988–2003.

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Lay Leadership Study and Research Plan, 1998.

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LAY LEADERSHIP STUDY: TIME LINE

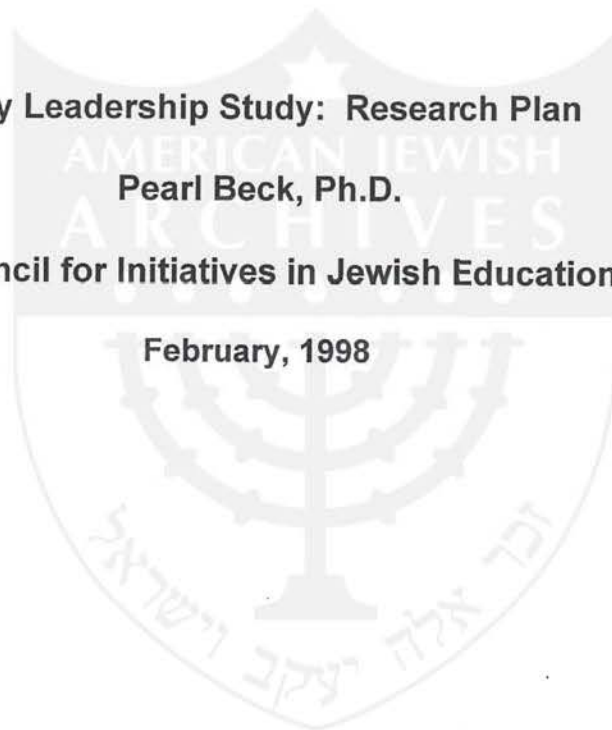
TASKS	March, '98	April, '98	May, '98	June, '98	July, '98	Aug. '98	Sept. '98	Oct. '98	Nov. '98	Dec. '98	Jan. '99	Feb. '99	March '99
Finalize Proposal	X-----X												
Select Cities		X-----X											
Collect Names			X-----X										
Design Interviews		X-----X											
Pilot Interviews			X-----X										
Conduct Interviews				X-----X									
Design Survey				X-----X									
Pilot Survey						X-----X							
Mail Surveys							X-----X						
Data Analysis									X-----X				
Write Draft Report											X-----X		
Finalize Report													X-----X

Lay Leadership Study: Research Plan

Pearl Beck, Ph.D.

Council for Initiatives in Jewish Education

February, 1998



Lay Leadership Study: Research Plan

Long-term Objective:

To expand the pool of people with talent and resources who are interested in Jewish education and who are willing to serve on boards of Jewish educational institutions and organizations. *as bd members funders*

Research Goals:

1. To identify factors which motivate lay people to become involved -- and to maintain their involvement -- with Jewish educational issues and institutions
2. To profile the current Jewish education lay leadership
3. To identify factors, including personal and structural, which serve as impediments to lay involvement in Jewish educational issues and institutions

4. serve as basis -

Underlying Assumption:

Jewish educational improvement will not occur without a combination of outstanding professionals, institutions and lay leaders. *partnership*

Groups to be Studied:

1. Lay leadership of local Jewish educational institutions and organizations (e.g. Boards of Jewish Education, Continuity Commission, primary and secondary Jewish schools, local Federation and JCC education chairs) *e.g.*
2. Lay leadership of national Jewish educational institutions and organizations - *(PESE)*
3. Leadership of Foundations and Trusts with a history of gifts to Jewish educational institutions and programs *Bronfman, Steinhardt, Weisner, Melton*
4. Lay leaders who are involved in Jewish organizational life, but who are not involved in Jewish educational organizations or institutions.
5. Jewish lay leaders who are involved in general (non-Jewish) philanthropic causes, but who are not involved in Jewish causes

Research Methodology:

Several methodologies will be used to address the research goals listed above. *maybe ↑ #*

1. In-Person Interviews: The first stage of the research will consist of conducting in-depth, one-on-one interviews with approximately 15-20 lay leaders and philanthropists. Those interviewed will include both those currently involved with Jewish education as well as those involved with other Jewish causes, exclusive of Jewish education. We will attempt to interview prominent national leaders, local leaders (e.g. board members of primary or secondary Jewish schools), as well as several individuals who are simultaneously involved on the local and the national levels.

2.Survey: Information culled from these interviews will be used to design a closed-ended survey. This survey will be sent to all the leaders and philanthropists identified in the 3 targeted cities as well as individuals who are involved exclusively on the national level. The survey will be sent to approximately 400 - 500 individuals. A 60% response rate is anticipated.

3.Focus Group: After the survey and interview data are analyzed, the findings will be presented to a group of Jewish education lay leaders for their comments, interpretations and recommendations. Their reactions to the data will be incorporated into the results section of the final report.

Sampling Frame:

Research Goals #1 & #2:

The Jewish educational lay leadership of 3 cities will be surveyed. Each city will represent one of the 3 categories of cities used by the Council of Jewish Federations for fundraising purposes. In each city, the local Jewish educational lay leadership will be consulted to help identify a comprehensive listing of their peers. This listing should include individuals who are active in local Jewish educational institutions as well as those who are active in local communal institutions, such as in JCC's and in local Foundations.

To survey the leadership of national Jewish educational organizations, complete listings will be obtained and surveys will be sent to the volunteer leaders of these organizations.

Research Goal #3:

To learn why some lay leaders in Jewish settings do not become involved in Jewish educational issues and organizations, we plan to interview a sample of such individuals identified by informants who are located in each of the 3 selected cities. The names of Jewish individuals who are exclusively involved in general (non-Jewish) causes will also be obtained from these informants.

Scope of Research Topics and Questions:

1.Interview and Survey Questions for Jewish Educational Lay Leadership:

In addition to obtaining demographic information, the following topics will be included:

- What originally motivated them to assume their first volunteer position in the field of Jewish education?
- What factors serve to sustain their interest? (e.g. Which project did they particularly enjoy doing? What issue interests them?)
- What frustrations/disappointments have they experienced?

- Do they serve on the Boards of other Jewish institutions? (If yes, which?)
- What (if any) lay position/s would they like to hold in the near-term and also in the long-term?
- Do they volunteer their time for any other Jewish causes? (If yes, which causes? Are they on the boards?)
- Do they volunteer their time for other general (non-Jewish) causes? (If yes, which ones and how do these organizations compare to the Jewish ones in terms of functioning, efficacy, volunteer responsibilities, gratification derived, etc.?)
- What do they regard as the major issues facing American Jewish education?
- How can these issues be addressed?
- What is their experience with, and impression of, the Jewish educational lay leadership?
- What can be done to encourage lay leaders and philanthropists to become more involved with Jewish education?
- What can be done to encourage lay leaders increase their level of giving to Jewish education?
- In what denomination and with what level of observance and knowledge were they brought up?
- What is their current level of observance, Jewish knowledge and Jewish learning?
- Is their household/extended family a Jewish education "user"? If yes, what kinds and levels of Jewish education do they use or have they used in the past?

Interview Questions for Those Not Involved in the Lay Leadership of Jewish Education:

In addition to many of the questions listed above, individuals whose voluntary activities are located outside of Jewish education (including outside the Jewish world), will be asked additional questions including: their "lay" career paths, their knowledge of Jewish educational institutions (including lay involvement with these institutions), their knowledge of Jewish educational issues, where they would contribute if they wished to donate money to Jewish education.

Report

The report will incorporate information culled from the interviews, the survey and the focus group. It will describe the career paths of lay people who are involved in Jewish educational activities and will identify the factors that contributed to their initial involvement as well as the factors that served to sustain their involvement. The gratifications as well as the frustrations of volunteer work in Jewish educational institutions and organizations will be discussed.

Lay leaders' general demographic (e.g. age, gender, education, geographical area) and Jewish demographic (e.g. level of Jewish education, Jewish identity, denomination) characteristics will also be examined to provide a context for understanding for understanding their attitudes and experiences.

To explore the potential for board development and expansion, information obtained from the interviews with leaders who are not involved in Jewish education will be presented. Perceived and actual impediments to involvement will be described.

The concluding section of the report will contain recommendations for recruiting lay leaders and also for sustaining their interest in Jewish education.



Lay Leadership Study: Research Plan

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Council for Initiatives in Jewish Education

March, 1998

Lay Leadership Study: Research Plan

Long-term Objective:

To expand the pool of people with talent and resources who are interested in Jewish education and who are willing to serve as board members, funders, and in other lay leadership roles in Jewish educational institutions and organizations.

Research Goals:

1. To identify factors which motivate lay people to become involved -- and to maintain their involvement -- with Jewish educational issues and institutions
2. To profile the current Jewish education lay leadership
3. To identify factors, including personal and structural, which serve as impediments to lay involvement in Jewish educational issues and institutions
4. To recommend strategies for recruiting capable lay leaders and for sustaining their interest in Jewish education.

Underlying Assumption:

Jewish educational improvement will not occur without a partnership of outstanding lay leaders and professionals.

Sampling Frame:

Local Lay Leadership:

The Jewish educational lay leadership of 3 cities will be surveyed. An attempt will be made to select cities that represent each of the 3 categories of cities developed by the Council of Jewish Federations (e.g. large, large-intermediate and intermediate). In each city, a comprehensive listing will be gathered consisting of those who are active in local Jewish educational institutions as well as those who are active in local communal institutions, such as in JCC's and in local Foundations. This list will be compiled with the help of the local Jewish educational lay leadership.

National Lay Leadership:

To survey the leadership of national Jewish educational organizations (e.g. JTS, JESNA, CAJE) complete lists will be obtained and surveys will be sent to the volunteer leaders of these organizations. (When the number of people on a board exceeds 100, surveys will be sent only to executive committee members).

Jewish Lay Leaders Not Involved in Jewish Education:

To learn why some lay leaders in Jewish settings do not become involved in Jewish educational issues and organizations, we plan to interview approximately 15 such individuals who will be identified by informants located in each of the 3 selected cities. Five to ten Jewish individuals who are exclusively involved in general (non-Jewish) causes will also be identified and interviewed for this study.

Research Methodology:

Several methodologies will be used to address the research goals listed above.

1. In-Person Interviews: The first stage of the research will consist of conducting in-depth, one-on-one interviews with approximately 25-30 lay leaders and philanthropists. Those interviewed will include both those currently involved with Jewish education as well as those involved with other Jewish causes, exclusive of Jewish education. We will attempt to interview prominent national leaders, local leaders (e.g. board members of primary or secondary Jewish schools), as well as several individuals who are simultaneously involved on the local and the national levels.

2. Survey: Information culled from these interviews will be used to design a closed-ended survey. This survey will be sent to all the leaders and philanthropists identified in 3 (yet to be selected) cities as well as individuals who are involved on the national level. The survey will be sent to approximately 500 individuals. A 50 - 60% response rate is anticipated.

3. Focus Group: After the survey and interview data are analyzed, the findings will be presented to a group of Jewish education lay leaders for their comments, interpretations and recommendations. Their reactions to the data will be incorporated into the results section of the final report.

Research Topics and Questions:

1. Interview and Survey Questions for Jewish Educational Lay Leadership:

In addition to obtaining demographic information, the following topics will be included:

Lay Career

- What originally motivated them to assume their first volunteer position in the field of Jewish education?
- Do they serve on the Boards of other Jewish institutions? (If yes, which?) Are they supporting other Jewish causes? (Which?)
- What (if any) lay position/s would they like to hold in the near-term and also in the long-term?
- Do they volunteer their time for any other Jewish causes? (If yes, which causes? Are they on the boards?)
- Do they volunteer their time for other general (non-Jewish) causes? (If yes, which ones and how do these organizations compare to the Jewish ones in terms of functioning, efficacy, volunteer responsibilities, gratification derived, etc.?)

Experience with Jewish Educational Endeavors

- What factors serve to sustain their interest in Jewish education? (e.g. Which project did they particularly enjoy doing? What issue interests them?)
- What frustrations/disappointments have they experienced in this area?

Attitudes Regarding Jewish Educational Issues

- What do they regard as the major issues facing American Jewish education?
- How can these issues be addressed? What is their experience with, and impression of, the Jewish educational lay leadership?
- What can be done to encourage lay leaders and philanthropists to become more involved with Jewish education?
- What can be done to encourage lay leaders to increase their level of giving to Jewish education?
- What kind of information and/or knowledge would help them be better lay leaders in the Jewish world?

Jewish Background & Jewish Education

- In what denomination, and with what level of observance and knowledge, were they brought up?
- What is their current level of observance, Jewish knowledge and Jewish learning?
- Would they be interested in a Jewish learning program?
- Is their household/extended family a Jewish education "user"? If yes, what kinds and levels of Jewish education do they use (or have they used in the past?)

2. Interview Questions for Those Not Involved in the Lay Leadership of Jewish Education:

In addition to many of the questions listed above, individuals whose voluntary activities are located outside of Jewish education (including outside the Jewish world), will be asked additional questions including: their "lay" career paths, their knowledge of Jewish educational institutions (including lay involvement with these institutions), their knowledge of Jewish educational issues, the reasons they have not become more involved in Jewish education and where they would contribute if they wished to donate money to Jewish education.

Report

The report will incorporate information culled from the interviews, the survey and the focus group. It will describe the career paths of lay people who are involved in Jewish educational activities and will identify the factors that contributed to their initial involvement as well as the factors that served to sustain their involvement. The gratifications as well as the frustrations of volunteer work in Jewish educational institutions and organizations will be discussed.

Lay leaders' general demographic (e.g. age, gender, education, geographical area) and Jewish demographic (e.g. level of Jewish education, Jewish identity, denomination) characteristics will also be examined to provide a context for understanding their attitudes and experiences. Background information regarding the board or organization that is most important to them will also be reported (e.g. type of organization, size of organization, size of board, whether it is local or national, etc.)

To explore the potential for board development and expansion, information obtained from the interviews with leaders who are not involved in Jewish education will be presented. Perceived and actual impediments to involvement will be described.

The concluding section of the report will contain recommendations for recruiting lay leaders and also for sustaining their interest in the area of Jewish education.

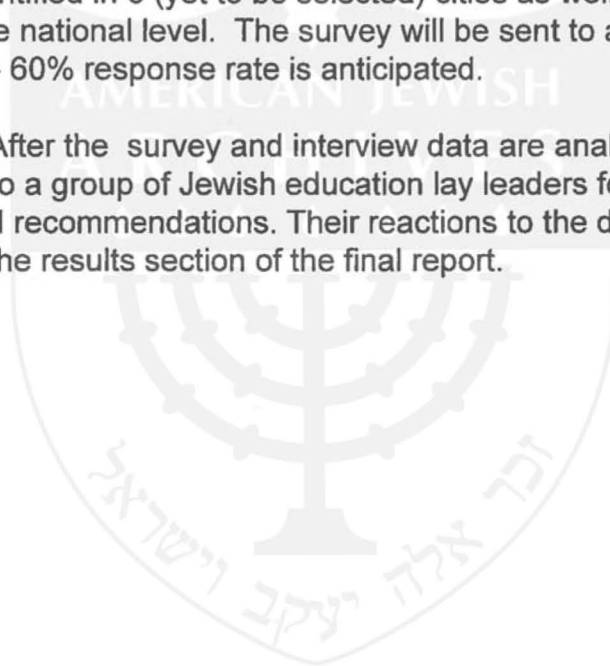
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Exhibit 3

