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

Series D: Adam Gamoran Papers. 1991–2008.

Subseries 1: Lead Communities and Monitoring, Evaluation, and Feedback (MEF),  
1991–2000.

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Box  
56

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Early development of MEF. "MEF in Lead Communities: A Three-Year Outline." Drafts, planning notes, correspondence, and budget, 1991-1993.

Pages from this file are restricted and are not available online. Please  
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Annette

good lesson from Cleve. re: MET from author messages:

MET is mandatory & useful  
b + underst poss probs

MET needs to become part of planning process  
- integrate w/ planning (Jack)

meet in Chicago w/ S, A, MI, JC, AG  
- <sup>2nd half</sup> January  
27-28-29

adds 3rd pt to Cleve needs  
- need facilitator

need variety of data sets &

- refl proc
- quant. data
- observats

- all part  
of self-eval

— call Dan Pekarsky - explain add further ss

# University of Wisconsin—Madison

MADISON, WISCONSIN 53706

DEPARTMENT OF SOCIOLOGY  
SOCIAL SCIENCE BUILDING  
1180 OBSERVATORY DRIVE

Post-It™ brand fax transmittal memo 7671		# of pages ▶ 2	
To	DAVID RESNICK	From	ADAM GANNAN
Co.	14 GRAETZ ST.	Co.	UW-MADISON
Dept.	93111 Jerusalem	Phone #	608-263-4828
Fax #	011-972-2-666223	Fax #	608-263-6448

Professor David Resnick  
14 Graetz St.  
93111 Jerusalem  
ISRAEL

November 16, 1991

Dear David,

Thanks for the comments on the monitoring, evaluation, and feedback proposal. Slowly but surely, the whole enterprise seems to be moving forward.

I enjoyed reading your paper on school choice in the supplementary schools market. I think it has a contribution to offer the general education field, and that Teachers College Record would be a good place for it. I hope you will also submit it for presentation at next year's conference of the Research Network on Jewish Education. (Did you receive the conference announcement?)

I have a few comments which I hope will be helpful. In general I thought the paper was very interesting but somewhat underwritten, and most of my suggestions have to do with expanding and elaborating.

(1) To be of interest to the general audience, the paper needs to set up the general problem more clearly, explaining how this is a special case which is useful for addressing the problem, and to return to the initial problem more strongly in the end. The paper begins to address a general problem--the effects of a choice system on educational quality--but does not elaborate much on the issue. I suggest expanding part I to include a fuller discussion of various predictions about what happens to educational quality when choices are available. (I see this as the major issue. I assume that is your view also.)

Part V seemed to undercut the paper's appeal to a general audience. Instead of discussing varied goals of Jewish education (p.14-15) and the analogy of public/private schools and supplemental/day schools (p.16-17), this section needs to draw lessons from the case study for policies on school choice. Despite the differences between Jewish supplemental schools and secular schools, which are well stated, I think there are some lessons for the general educational community. What affects quality when choice is available? Apparently schools try hard to meet the interests and needs of their clients, within limits created by self-imposed standards. We also learn that the excitement of a new option may wear off, particularly if there is a perception that quality has not been maintained. Another finding is the variability of options, as noted in the last sentence of Part V (p.17). Finally, it might be worth noting that price is clearly not everything: most parents did not choose the cheapest way to obtain a bar mitzvah. I think these kind of issues need to be at the forefront of Part V.

I agree the question of quality is important but unresolved (but I prefer the

word "ambiguity" to "unclear" at the bottom of p.14). One point the paper could make is that neither the researchers nor the parents have good ways of judging the quality of the schools. This certainly holds in general education as well, and it is relevant to the question of what happens to quality in a system of choice. For the purposes of this paper, I think it is useful to speak of quality as quantity, recognizing that quantity is a crude measure. That would allow you to be more consistent; at present you speak implicitly of quality as quantity in describing the differences among the schools. I recommend discussing this issue early on--perhaps towards the end of Part III--so we know how we are supposed to judge the different schools.

As I see it, the paper suggests that choice does not guarantee quality, especially when quality is so hard to measure. It does stimulate variability, and it may help to maintain standards of quality (measured by quantity).

(2) Minor points:

(a) P.9 - The demands of the JYH program did not seem "minimal" to me, particularly the demands on families.

(b) Often I wanted more information on the schools. For example, why did the founding directors of the JYH move (p.10)? What did bar mitzvah mean to the students in the different kinds of schools?

(c) P.13, top, last sentence of Part IV - Drop the phrase, "in supplementary Jewish education." With it, the sentence makes it sound as if the main point of the paper is assessing Jewish supplementary education, and that will not be of interest to the general audience.

(d) P. 13 , first sentence of part V - Not clear what you mean by "attainment, not achievement." Need to explain this point.


(e) P. 15, bottom - where does the quote end?

(f) P. 16 - Admission requirements also include the willingness to pay!

\*\*\*\*\*

Good luck! I hope to see you at the Research Network conference next summer. Have a good year.

Sincerely,

  
Adam

to write

- ① revision of 3yr plan for MEF
  - informal 4 rpts
  - more on feedback
  - more on MEF details, or how they'll be des. & used
- ② job descrip of chief field res
  - bkg
  - tasks & responsibilities
  - (goals)
  - ~~- experience~~
  - criteria
- ③ 3-yr eval of Non Fct
  - implies for CJE & IC's
- ④ methodology implies of MEF



**STATE OF WISCONSIN**

To \_\_\_\_\_

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**WHILE YOU WERE OUT**

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CENTER  
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RESTRUCTURING  
OF  
SCHOOLS

*University of Wisconsin-Madison  
Wisconsin Center for Education Research  
1025 W. Johnson St.  
Madison, WI 53706  
(608) 263-7575*

July 26, 1991

To: Seymour Fox, Annette Hochstein  
From: Adam Gamoran  
CC: Shulamith Elster  
Re: my participation in the CIJE research project

This memo is to clarify my proposed involvement in the CIJE research project, as developed during our meetings prior to the Jerusalem workshop. I am happy to listen to any clarifications or modifications you may wish to offer.

The job would be that of a consultant to the CIJE, and would report to the CIJE director. It is important that the position be one of a colleague rather than a subordinate of the Chief Education Officer, to encourage constructive criticism of the educational programs supported by the CIJE in the lead communities.

In this position, I would be responsible for ensuring (a) the quality of fieldwork in lead communities; and (b) progress in the development of indicators of the outcomes of Jewish education. My time commitment would be limited to twelve hours per month during the time periods specified. My tasks would be as follows:

FIRST PRELIMINARY PHASE: OCT. - DEC. 1991

A. Field research

1. Prepare a job description for the field researchers and the chief field researcher. The description would include such items as rationale, fieldwork tasks, reporting requirements, standards, and expectations.
2. Circulate the job description for feedback from (a) those involved with the CIJE, especially those who participated in the July 1991 CIJE workshop; and (b) colleagues with expertise in the fields of evaluation and qualitative research, such as Gary Wehlage, Mary Metz and Karen Seashore Louis.
3. Revise the job description and present it to the director of CIJE.

B. Outcome development

1. Work with Shulamith to prepare a brief description of what the outcome paper might entail. If possible, advise Shulamith on whom to hire for the paper.

SECOND PRELIMINARY PHASE: JAN. - JULY 1992

A. Field research

1. The CIJE director and chief education officer will hire the field researchers. I would participate in the final interview stage of selection.



2. Work with Shulamith and the chief field researcher to establish a monitoring and feedback system: Specify main areas of focus, procedures, forms, etc., as much as is possible in advance.
2. Participate in an initiatory meeting with all the field researchers. The main purpose of the meeting would be for the chief field researcher to train the other field workers, based on the monitoring plans we have worked out.
3. Remain in regular contact with the chief field researcher and provide assistance as needed.

**B. Outcome development**

1. Provide continuous feedback to the paper author. Approve final version of the initial draft of the paper, July 1992.

**YEAR 1 OF LEAD COMMUNITIES: SEP. 1992 - JUNE 1993**

**A. Field research**

1. This period of the fieldwork project is problematic for me because I will be out of the country. Although I can provide feedback on written discussions of fieldwork findings, I will not be available to participate in quarterly meetings of the fieldwork team. Responsibility for supervision will rest with the chief field researcher. I will review the nine-month reports of the field researchers which are due during this period.

**B. Outcome development**

1. Advise the author of the thought paper on revisions in response to reaction from diverse representatives of the American Jewish community. Approve final version of the expanded draft of the paper.
2. Prepare agenda, attend, and lead a meeting of the research advisory committee to discuss (a) their views of the outcomes described in the paper and (b) their suggestions for approaches to measuring these outcomes.

**YEAR 2 OF LEAD COMMUNITIES: SEP. 1993 - JUNE 1994**

**A. Field research**

1. Establish more frequent contacts with the chief field researcher, and participate in quarterly meetings with the fieldwork team. Provide feedback on preliminary papers leading up to the 21-month reports from the lead communities.

**B. Outcome development**

1. Establish a mechanism for developing instruments for measuring outcomes of Jewish education, according to (a) the outcomes paper completed in year 1; (b) reports of operative outcomes uncovered in the lead communities; (c) conceptions of the educated Jew developed at the Mandel Institute; and (d) suggestions from the research advisory committee in response to these sources of information.

**YEAR 3 OF LEAD COMMUNITIES: SEP. 1994 - JUNE 1995**

If all goes as planned in the preceding three years, we may be ready at this time to begin a quantitative study of the outcomes of education in the lead communities and elsewhere. Taking the outcome indicators we will have developed, we may be able to assess standards in the lead communities and compare them to standards elsewhere. This cannot be viewed conclusively as a causal analysis, but it will be an attempt to validate the conclusions of the field work, which will presumably continue through this year.



talk to about MFF & CICE

Wehlage

K. Louis

B. Schneider

A. Porter

Pauline Lipman

(Metz)

Manski

**STATE OF WISCONSIN**

To \_\_\_\_\_

Date \_\_\_\_\_ Time \_\_\_\_\_

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Returned Your Call	<input type="checkbox"/>	Will Call Again	<input type="checkbox"/>

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MANDEL @ HOSI VMS

- test

\* needs revision of MET description to present to Tourlet,  
add <sup>intro</sup> on purpose etc.

Bany working on bp  
Isu approved on "research capability"

paper by NAE "Research agenda for education" - a policy-oriented, p. res

hired Jack Uteless to be key planner for IC's from recruitment → selection  
- module, launch req for proposal

IC's selected hopefully by April

~~select~~

begin recruitment of c.f.r. before IC's selected

Monitoring, Evaluation, and Feedback: A Three-Year Outline  
Adam Gamoran  
University of Wisconsin, Madison  
July, 1991

This memo proposes a plan for the monitoring, evaluation, and feedback component of the CIJE. The plan contains three elements: field research in lead communities; development of outcomes and tools for measuring outcomes; and stimulation of self-contained research projects. Tasks are described for the first three years, beginning fall 1991. Explanations of rationales are drawn in part from my earlier memo.

### FIELD RESEARCH IN LEAD COMMUNITIES

Studying the process of change in lead communities should be a major component of the CIJE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation. Suppose despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

Field researchers. At least one half-time field researcher would be hired for each community. Although budgetary and personnel constraints are likely to constrain the number of researchers the CIJE is able to hire, we should be aware that the depth of monitoring, evaluation, and feedback will be related to the number of researchers supported by the CIJE. I estimate that one half-time researcher would be able to provide the level of detail described in this memo if the size of the Jewish community is approximately 50,000 or smaller.

Field researchers would have the following responsibilities:

1. Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities.
2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.
3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system, broadly conceived.
4. Write a nine-month report describing items 1-3 (May 1993). An important contribution of the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CIJE.



5. Replicate the initial data collection a year later, and continue monitoring progress toward the commission plan.

6. Issue a 21-month report (May 1994), which would describe educational changes that occurred during the first two years, and present an assessment of the extent to which goals have been achieved. Two types of assessment would be included: (a) Qualitative assessment of program implementation. (b) Tabulation of changes in rates of participation in Jewish education, which may be associated with new programs.

It may be possible to compare changes in rates of participation to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of Hebrew school attendance after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The 21-month reports would serve as both formative and summative evaluation for the local commissions and the CIJE. In other words, they would not only encourage improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

7. Field researchers would also serve as advisers to reflective practitioners in their communities (see below).

Schedule. During fall 1991, a job description and list of qualifications would be prepared. The researchers would be hired and undergo training during spring and summer 1992. During this period, further details of the monitoring and feedback system would be worked out. The fieldwork itself would begin in late summer or early fall 1992.

Chief field researcher. One of the field researchers would serve as chief field researcher. The chief field researcher would work full-time. In addition to studying his or her community, the chief field researcher would be responsible for training the others and coordinating their studies.

Reflective practitioners. In each lead community, two or more reflective practitioners would be commissioned to reflect on and write about their own educational efforts. The reflective practitioners, who could be selected by their local councils, would be teachers or administrators involved in CIJE programs with reputations for excellent practice, or who are attempting to change their practices substantially. The local field researchers would supervise and advise the reflective practitioners.

Collection of achievement and attitudinal data. Some of the participants at the July, 1991 Jerusalem workshop advocated administering such achievement tests and attitudinal questionnaires as are currently available. This effort would require another researcher dedicated to the task. Much work remains to be done in locating and selecting among available tests and survey items.

## DEVELOPMENT OF OUTCOMES

It is widely recognized that the question of the outcomes of Jewish education, which was

not addressed in the Commission report, cannot be avoided by the CIJE. This is not only a practical necessity, but a requirement of the research project: to evaluate the success of programs in the lead communities, one must know the criteria by which they are to be evaluated. Hence, the research project will take up the issues of (a) what are the aims of Jewish education; and (b) how can those aims, once defined, be measured?

Proposed tasks for this component of the project for the first two years are:

1. Commission a thought paper by an experienced professional on the outcomes of Jewish education. Guidelines for the paper would include:
  - (a) The focus would be concrete rather than vague. This might be accomplished by posing the question as, "If you were to evaluate the outcomes of Jewish education, what would you look at?"
  - (b) Outcomes should be addressed in the areas of cognition, attitudes, values/beliefs, practices, and participation.
2. Distribute the paper for comments to national/continental organizations for feedback.
3. Engage the original writer to expand the paper in light of feedback received from the major organizations. The revision should include an analysis of points of agreement and disagreement among the organizations.
4. Present the revised paper to the research advisory group, posing the following questions:
  - (a) What do you make of this set of outcomes?
  - (b) How might they be measured?

The research advisory group would have two additional sources of information to consider: the operative goals of programs in lead communities, as described by field researchers in their 9-month reports; and conceptions of the educated Jew developed by the Mandel Institute.

5. Commission appropriate experts to begin selecting or creating outcome indicators.

#### **STIMULATION OF SELF-CONTAINED RESEARCH PROJECTS**

At any time during the process, the CIJE may require urgent attention to specific issues of educational effectiveness. (An example might be the relative effectiveness of supplementary school and summer camp attendance for Jewish identification.) After developing an internal consensus, CIJE would either (1) issue a request for proposals on that topic, or (2) recruit and commission individual to carry out the research project.

## PROPOSED TIMELINE

	<u>FIELDWORK</u>	<u>OUTCOME DEVELOPMENT</u>
Fall 1991	create job description	commission paper
Spring 1992	oversee hiring, training	
July 1992		approve first paper
Fall-Spring, 1992-93	fieldwork underway	responses to paper from national orgs.
May 1993	9-month reports	revise paper
August 1993		meet with research advisory committee
Fall-Spring, 1993-94	fieldwork continues	develop outcome indicators
May 1994	21-month reports	

**TOWARDS THE IMPLEMENTATION OF THE RECOMMENDATIONS OF THE  
COMMISSION ON JEWISH EDUCATION IN NORTH AMERICA:  
THE COUNCIL FOR INITIATIVES IN JEWISH EDUCATION**

**LEAD COMMUNITY PROJECT**

**The Lead Community: A Concept, A Process, A Place**

**An Overview and Basic Conceptions**

A Lead Community is a concept, a process and a place - a community engaged in planning for a comprehensive, far-reaching and systematic improvement of Jewish education.

**The CIJE and the Lead Community**

Several lead communities will be established and each will enter a partnership with the CIJE committing itself to develop and implement a specific plan of programs and projects in the community.

**Content**

The community plan must include elements designed to address the 'enabling options' - professional development programs for all educators, recruitment and involvement of key lay leadership and enhanced use of Israel experiences as an educational resource.

**Programs**

The communities should undertake programmatic initiatives most suited to meet local needs and resources and likely to have a major impact on the scope and quality of Jewish education in the community.

**Monitoring, Evaluation, and Feed-back**

Community plans and projects should be carefully monitored and evaluated and feedback provided on an ongoing basis.

**Appendix: Recruitment and Selection of Lead Communities**



## An Overview

A Time to Act, reflects the North American Commission on Jewish Education's recommendation to establish local laboratories for Jewish education as a strategy for bringing about significant change and improvement.

Three to five model communities will be established to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, when the importance of Jewish education is recognized by the community and its leadership, and when the necessary funds are secured to meet additional costs.

These models, called "Lead Communities", will provide a leadership function for other communities throughout North America. Their purpose is to serve as laboratories in which to discover the educational practices and policies that work best. They will function as the testing places for "best practices" - exemplary or excellent programs - in all fields of Jewish education.

Each of the Lead Communities will engage in the process of redesigning and improving the delivery of Jewish education through a wide array of intensive programs.

(A Time to Act, p. 67)

### Basic Conceptions

1. The process of change is gradual. A long term project is being undertaken by the CIJE. The Lead Community Project is a means of bringing about meaningful change in Jewish education in North America by addressing those elements thought to be most critical to improvement.
2. Without community support for Jewish education and an approach to deal with the shortage of qualified personnel no systemic change is likely. These are the "building blocks or enabling options" identified by the Commission.
3. The initiative for bringing about community change should come from the local community itself.
4. Each local community will be encouraged to strengthen existing programs and to develop innovative and experimental programs to expand thinking beyond existing ideas and approaches.
5. A local planning mechanism will be responsible for generating plans and ideas and designing programs that have the support of a coalition of the stakeholders--key institutions and individuals.
4. In order for a community plan for change to be valid and effective it should fulfill two conditions:
  - It must be comprehensive and of sufficient scope to have significant impact on the overall profile of Jewish education.
  - It must ensure high standards of quality. This can be accomplished with the assistance of experts in the field, careful and thorough planning, and appropriate evaluation procedures.
5. The CIJE will assist in designing and field-testing solutions to local problems through the professional and technical support of its staff and consultants and the assistance of the many resources of its co-sponsors-- the Council of Jewish Federations (CJF), the Jewish Community Center Association (JCCA) and the Jewish Educational Services of North America (JESNA)-- the national training institutions, the denominations and the local, regional, and national organizations.

### The CIJE and the Lead Community

A coalition of the majority of the local educational institutions should be required to undertake a planning process and to make a commitment to recruit outstanding lay leadership so as to establish a supportive community climate to ensure the success of the plan.

Based on the specific needs of the community and the resources available for implementation each community should propose a specific program that it believes will make a significant impact on the scope and quality of Jewish education.

The CIJE should offer each lead community:

- professional guidance by staff and consultants
- on-going consultation on content and process issues
- liaison to continental and international resources
- facilitation of funding for special projects through the CIJE's relationship with foundations
- assistance in the recruitment of community leadership
- Best Practice Project
- Monitoring, Evaluation and Feed-back

Each community should make specific programmatic choices selected by mutual agreement from a menu prepared by the CIJE. The CIJE menu will include required and optional elements.

The required elements will include:

- activities to "build the profession" including in-service education for all personnel
- recruitment and involvement of outstanding lay leaders for "community support" of Jewish education
- maximum use of Best Practices so as to strengthen existing programs
- additional and enhanced Israel experience programs

### Personnel Development:

Communities should develop and implement a plan for the recruitment and training of personnel and for activities to "build the profession". The plan should consider the community's varied settings for formal and informal Jewish education and plan for pre-service and in-service activities for teachers, principals, rabbis and all personnel working in the field, either as professionals or as avocational educators. It should include a plan to recruit and train previously under-utilized community human resources.

Specific examples of personnel development activities include the development of policies and programs to improve salaries and benefits, to develop new career paths and to empower educators by creating new roles for educators in decision-making in schools and in the community.

The CIJE will recommend elements of an effective personnel development program and assist communities in the planning and implementation stages.

### Community Support:

Each lead community should launch a major effort at building community support. What is required is leadership at the congregational/school, agency board level and Federation levels. This requirement includes the recruitment of top leadership for financial support for Jewish education so as to create a supportive community climate to influence funding decisions and provide effective leadership for lead community activities.

Some possible approaches to developing stronger leadership have been identified. They include:

- improving the status of leadership in Jewish education
- providing mentors for younger leadership from among the well-established and influential community leadership
- training of school and agency boards through a community based training program
- recruiting leadership from active adult learners
- community leadership development programs designed specifically for Jewish educational leadership



Among the specific activities that should be considered is the adoption of a formal agenda for COMMUNITY SUPPORT that includes:

- new financial commitments with specific appropriate approaches to local fund-raising
- establishment of a formal education "lobby"
- development of regional or inter-communal networks
- formalization of lay-professional dialogues
- public relations efforts

Optional elements may include the enrichment and/or modification of existing programs and the development of innovative and experimental programs for a variety of settings.

The CIJE should formalize its relationship with each lead community specifying the programs/projects to be implemented - the goals, anticipated outcomes, and the additional human and financial resources that the community will make available. The agreement should likewise specify the support that can be expected from the CIJE.

The CIJE should provide each lead community with timely feed-back through the study of programs and projects. At a later stage, the successful programs may be offered to additional communities for replication or modification in other settings. Others may be dropped altogether.

## Content

A wide variety of possible options reflecting the commitments, concerns and interests of the commissioners were considered - any one of which could have served as the basis for the Commission's agenda. It was recognized that the options could be usefully divided into two large categories: enabling options and programmatic options.

The Commission decided to focus its work initially on two enabling options as major approaches to change without which other program options were unlikely to achieve their goals. The enabling options are to "build the profession" so as to deal with the shortage of qualified personnel and "the community - its leadership, structures and funding" so as to provide the support essential for community change. Each community will be required first to plan for the "enabling options", the required elements of the community plan.

The Commission identified programmatic areas for intervention as a means to improving existing programs, strengthening institutions and developing innovative and experimental projects. The programmatic areas include the target populations (early childhood through senior citizens), settings and frameworks (informal and formal - e.g., schools, centers and camps) and specific content and methods.

Each community should choose the programmatic areas through which they plan to address these options.

"Enabling options" should be reflected in the programmatic areas selected by the community, those most suited to local needs and conditions.

Two examples help clarify the critical relationship between "enabling options" and specific programs.

- Training programs for principals improve schools.
- Individual schools benefit when supplementary school teachers participate in required in-service training programs.

"As the Lead Communities begin to develop their plans of action the Best Practices inventory would offer a guide to successful programs/sites/curricula which could be adopted in the Lead Communities." (The Best Practices Project by Dr. Barry W. Holtz). Thus a community choosing to undertake a specific program/project will be offered models of successful programs/projects by the CIJE so as to incorporate experience in the field in planning and decision making. The community can then either replicate, modify or develop unique programs, keeping in mind the standards set by these models.

## Monitoring, Evaluation, and Feedback

Ongoing monitoring of progress -- collection and analysis of data -- should assist community leaders, planners and educators to improve and adjust implementation activities in the communities.

The CIJE should establish an Evaluation Project to provide:

- ongoing monitoring of activities and elements of the community plan
- evaluation of progress in appropriate form/s
- a feedback loop(s) to "connect practical results with a process of rethinking, replanning and implementation"

Data will be collected locally and nationally to:

- evaluate the impact and effectiveness of individual programs
- evaluate the effectiveness of the Lead Community Concept as a model for change
- create indicators and a data base to serve as the basis for an ongoing assessment of Jewish education in North America.

It is anticipated that this work may contribute to a periodic "State of Jewish Education Report" as recommended by the Commission.

Research findings provided through the feedback loop(s) will make information available on a continuous basis for decision-making purposes. The feedback loop(s) provide for the rapid exchange of knowledge and the ability to use information in both planning and practice. It is anticipated that this approach will result in ongoing adjustments and adaptations of plans.

## UPDATE: NEXT STEPS

During its initial months the CIJE has succeeded in establishing a organization and infrastructure that is now ready to launch work on the recommendations of the Commission. The Senior Policy Advisors and the Board of Directors of the CIJE have held their initial meetings and reviewed preliminary papers and conceptions. The Education Officer has begun work on a full-time basis and a search is underway for the Executive Director and Senior Planner.

Two deliberations were held at the Mandel Institute in Jerusalem - January and July 1991- with CIJE staff, advisors and consultants. A working group of educators and planners has been formed to assist the CIJE in its work.

A first workplan for the CIJE and time line have been established that includes the following elements:

- Establishing Lead Communities - as outlined in this paper

- Undertaking a Best Practices Projects as outlined in the enclosed CIJE paper by Dr. Barry W. Holtz

- A paper now being prepared towards the establishment of a research capability in North America

- A project to building community support including the preparation of a strategic plan

- Development of an approach to a continental strategy for preparing Jewish educators

- Developing and launching a monitoring, evaluation and feedback program for the CIJE

Separate papers will be forthcoming on each of the above elements of the CIJE's program.

SRE  
8/91



## Appendix: The Recruitment and Selection of Lead Communities

The following approach has been proposed for the recruitment and selection of lead communities through a two round screening process.

### Application and Selection

#### Round One: Request for Proposals (RFP)

Following a public announcement and communication to the local federation, which will include information about criteria and the selection process, communities will have six weeks to prepare a letter of intent which will be processed by CIJE staff, reviewed by Senior Policy Advisors and a committee of the Board of Directors.

#### Selection Criteria:

- A. City Size: minimum Jewish population of 15,000 to maximum Jewish population of 500,000
- B. Commitment  
In the Letter of Intent the local federation will be asked to provide evidence of:
  - 1. the community's capability of a joint effort by all elements of the community
  - \* 2. commitment to involve all stakeholders
  - 3. an existing planning process
  - 4. initiatives and progress in Jewish education in recent years (5 years)
  - \* 5. a serious commitment of lay leadership
  - 6. potential to recruit strong community leaders
  - 7. potential for funding for lead community activities
  - 8. understanding of the importance of creating an environment conducive to innovation and experimentation
  - 9. commitment to developing personnel.
- \* Letters of support should be included from a sampling of the stakeholders - educational and communal leaders.

Communities will be selected to participate in the second round.

Following discussion and approval by the Senior Policy Advisors and the Board of Directors, the CIJE staff will begin the recruitment process as outlined above.

## Round Two: Formal Application

Communities selected for Round Two will be invited to send representatives to an informational seminar in preparation for Round Two and a more detailed application process that will include a site visit by CIJE staff upon receipt of the completed form.

Following screening by the CIJE staff, comments will be elicited from the Senior Policy Advisors and all applications, materials and comments will be reviewed by a committee of the Board of Directors and recommendations made for approval by the Board.

## Timetable for Recruitment and Selection:

1. Requests for Proposals (RFP): early September 1991
2. Round One applications due: October 15, 1991
3. Decision by CIJE Board: mid November 1991
4. Seminar for Round Two Communities: early December 1991
5. Round Two applications due: late January 1992
6. Decision by CIJE Board: by March 1992

- need - job descrip (w/bks) - for use in recruiting
- brief job descrip (for advertising)

- hired on one-yr contract, s.v. to part time, to run for first one, committed for 3 yrs

- to begin: June 1, 1999  
as as soon as possible thereafter

We are seeking exper field res . . . (see descrip)

bks: seize the moment - Time to Act

- dire state of J community - demogr quality of life

- Mandel Commisss → A Time to Act

- Centerpiece - lc's

- staff devel

- common s-ppt

- recognize need for MEF

- s-ppt the initiatives in lc's

- dissem productive strategies & under J community

MEF headed by chief field researcher

- full time posn - s-perv staff of 4/5  
- guided by res adv's board & consultants  
- 2 types of activities

- carry out field res in one of lc's

- train, coord <sup>work</sup> field res in other lc's

- initial work - design MEF system - proceeds



goals - assist - contin edukt - formative eval  
- replicable knowl

- MET as essential component...





M&E

met as part of shaping of the ~~pl~~lc project

Purposes of met

- formative input (feedbk) to planners + doers
- assess impact

- want to learn how to imprv what's being done, figure out if working

- also need - perf mgmt system

- tool for those who manage the proj

- need coord w/ M&E

- avoid duplic, confl, make enrich

test? (Elana Shulhami)  
Tel Aviv Univ

- Hebrew?

- basic J literacy?

M&E must prod lc's to articulate goals of proj

consider: best prac for what?

- set Barry to clarify

- see if occurs in lc

MG probl of dealing w/ M&E when goals not explicit

- may need to leave room for ambiguity

BH — Mission for M&E proj: does whole = more than sum of parts???



Hershelman  
- trying for MCF

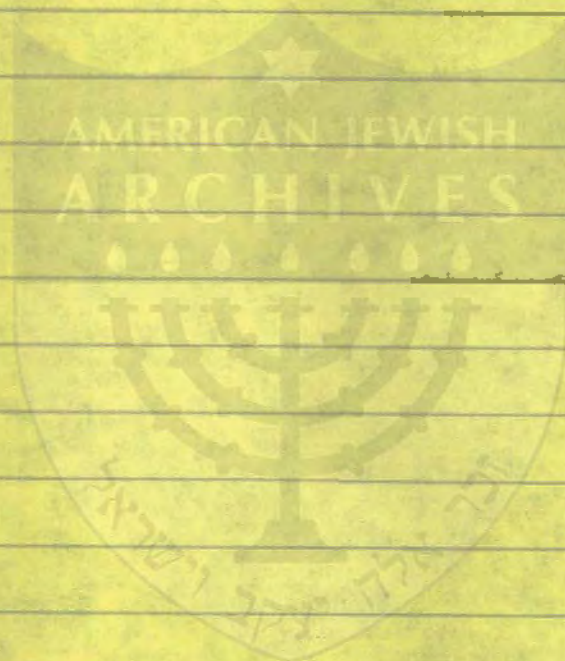
- recruiting

- Na'ava Frank - Harvard

Slyman, Schaffer, Feiman-Manser  
people studying in Israel

- Heilman - prof at Q College  
Adrienne Bank

Bethanie Horowitz - Larry's wife  
- soc psych - A&J rels in MCF  
- peraps of conf





impte of selbe  
band on model of success  
(dep on goal of selc)

concep of l-c

~~community~~

vis. of successful l-c after 2-3 yrs

- community
- leadership - articulate vision
- broad participation  
representative
- increased funding
- ongoing participation, advocacy
- local CITE - professional head
- local + cadmental planning
- effective governance
- conflict? public debate on edu issues

Gurois - what l-c's can represent

- lever for change
  - funding
  - bring players to the table
  - catalysts



# Content

## Vision

- mission of j educ <sup>for each constituency</sup>
  - <sup>striving for</sup> excellence
  - scope - ess
  - standards
    - among staff level w/ hi-level trainers
- each IC must define

— eval will document rationale for choice of content (if it occurs!) — or will show abs of rationale

- outcomes emerge out of these discussions

- theory of change — must be made explicit

- what leads to what

- parts related to whole — systemic change

- pilot programs?

- es are sup of kids w/ trip to Isr, supplem sch, summer camp, college

- diff areas, w/ diff participants

- progs that address multiple pps

- es fams w/ young chldn



— best pracs

— begin by looking at s-oplem schol

— systemic  
— cti  
— s-pervus training

— B Chazam, P Geffen working on Isr experience

— j ed in jcc world — serving own constituents  
— facilitating for other risks

— early childhood

— day schools

— for the future — camping

— college

— best pracs or best instits?  
(good schls)

— problem — great flux in quality over time

— SF — this not a prob — vis. in is the pt  
— vis. in is the pt — vis. in is the pt

— how will I c learn about & use info?

— will set rpts on good system schls



MM encouraged: battle is with fighting  
crew looks good

## personnel

— new people

— recruitment strategy

— new positions

— qual of staff work life

— "thoughtful input condits for staff"

— ongoing educ for staff

— draw on training instits & other nat'l resources

— introduce best practices

— content issues

— empowerment



planning  
port in syst

JED \$5.00 single  
\$15.00 yearly subscr  
Fall 91 on Time to Act  
BSE  
426 W. 58th St.  
NY NY 10019

Manual??

fund m, avail ???  
- line of credit??

~~time~~

talent bank - intelloc line of credit  
- need to gear up next reserves

local cost of running a lc  
+ cost of running progs  
- need a \$ meeting

(also cost of (ITC)  
- need to generate  
hypothetical progs first

advisory grp?

2-tiered planning process

- retaining the concept of lc's w/ continued indices  
- w/in lc's for progs

teleconference

~~what~~ - what g's may emerge?

- who are you to do this ???

- MG-g's will be to clarify what's involved

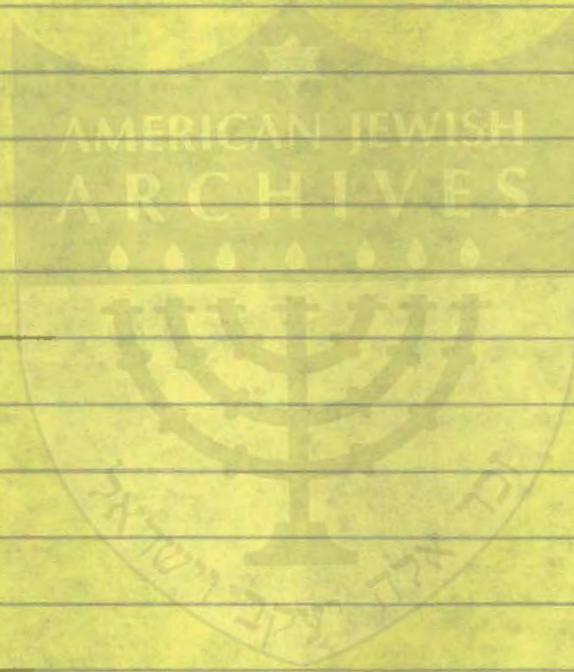
- need to recruit

guess likely g's  
& give some ~~answers~~ answers



proposal review process

- probl of separating fact from fiction





- #4 not enough
- time scale
  - who writes the  $\frac{1}{4}$  rpts

standardization should go further

- need basic consistency across cities

what about cost data

- 2 data sets - mgmt
- evaluative

overlap but not same

### summary issues

- 1) 2 data sets, or 1? what is role of MET?
- 2) who should be responsible for ongoing monitoring?  
- How handle  $\frac{1}{4}$  reporting? MET or LC?
- 3) std of data?
- 4) who does field researcher work for?  
- resolve on time-frame basis?





## Shulamith cants

will get written cants from Seymour  
Irkan likes it

rel btr planner + MEF

- talk w/ Jack + Shulamith
- enough monitoring? too much eval?
- will design deliver what CIJE needs?

need strates for dealing w/ monitoring

- need data for CIJE, communities
- this is field - not ordered
- want get short-term feedback

needs - perf mgmt syst - perf measurement

- IC will need plan - goals, process, funding, timeline, responsibility assigned

- need monitoring - whether undertaken

- whether seems to lead to results

- es rpts against timelines

8/13/91

## POSITION DESCRIPTION FOR DIRECTOR

### I. Program Administration

#### A. Day to Day Operations:

- 1) Management of school office
- 2) Scheduling of program functions  
(e.g. lunch bunch, substitutes, annual calendar)
- 3) Maintain school, student records
- 4) Management of school resources  
(e.g. supplies, pantry system)

#### B. Curriculum Development & Evaluation

- 1) Oversee general curriculum goals
- 2) Supervise and facilitate classroom curriculum  
and planning on an as needed basis

#### C. Marketing & Enrollment

- 1) Assess and develop Marketing Plan
- 2) Develop and implement enrollment plan  
and procedures
- 3) Develop and implement in conjunction with  
parent-board new parent orientation program

#### D. Licensing & Accreditation

- 1) Review with and/or test staff on licensing  
standards
- 2) Ensure that the school is operated in  
compliance with all required state licensing,  
city certification and national (NAEYC)  
accreditation standards

#### E. Regular Performance Appraisals

The director will report to the board of directors  
and will participate in regular performance  
appraisals by the board or a board appointed  
evaluator.

### II. Supervision of Staff

- A. Coordinate recruitment of new staff in conjunction  
with parent/board committees
- B. Coordinate and supervise training of staff in  
compliance with New Morning, City, State, and  
Federal standards
- C. Facilitate goal setting and review of staff  
performance on a regular basis
  - 1) Ensure compliance with applicable regulations  
and standards
  - 2) Maintain personnel records
- D. Ensure compliance with New Morning personnel

policies and procedures

1) Facilitate formal and informal grievance procedures

2) In conjunction with board, implement termination procedures

### III. Administration of PreSchool Finances

A. Ensure that general bookkeeping, payroll and taxes are completed according to New Mexico guidelines and maintenance of necessary records

B. Monthly reports to board on financial status of program (e.g. budget v actual revenue/expense statements)

C. Ensure that appropriate state and federal tax and unemployment reporting is completed according to required deadlines

D. Coordinate, develop, and implement annual budget with Finance Committee

### IV. Coordination and Liason

#### A. Parent Cooperative

1) Serve as liason between parents and board/staff and facilitate resolution of concerns & conflicts

2) Work with parents to resolve concerns or problems regarding individual children's needs

3) Communication to parents re: policies and procedures, enrollment, scheduling, calendar, and any other necessary information

4) Attend monthly board meetings and other committee meetings as required

#### B. Outside Agencies and Professional Community

1) Oversee property management responsibilities

2) Participate in professional child-care and community organizations on behalf of school and board (e.g. attend monthly 4-C mtg, Director's Caucus mtg, Directors of Part-Day programs, other city/state child care committees)

3) Develop and implement own continuing education plan and annual work plan

I wanted to give you an update on a couple of items. First, I had several phone conversations with Daniel Pekarsky and Daniel Blain in Cleveland. Pekarsky is now proposing self-evaluations there, at least as the first step, rather than an outside evaluator. This idea grew out of the great difficulty he found in reaching agreement among the various participants in Cleveland on what would be evaluated and how the evaluation would occur. An outside evaluator might be brought in at a later stage. I advised both Pekarsky and Blain on this plan.

First, I thought it sounded like an intelligent plan given the frustration of current efforts--it seemed as if it would have taken a year or so just to agree on an evaluation plan, let alone do any evaluating, as things were progressing. Second, I suggested they present the plan as a "reflective practitioner" approach to evaluation, as a way of framing the plan and explaining how it would work and why it would be useful. Third, I raised two concerns about this approach:

(1) For the self-evaluation to be meaningful, the stakes cannot be overly high. Dan Pekarsky convinced me that those running programs are thoughtful, intelligent, and insightful, but no one would do an honestly critical self-evaluation if his/her job were on the line. Thus, the self-evaluations can be used only for improving programs that have been implemented, not for making decisions about the survival of programs, agencies, or positions.

(2) The reason most educators cannot be reflective practitioners, I suggested, is that they are too busy running the programs to have time to reflect critically or evaluate. For the reflective practitioner approach to succeed, plans for making time available must be made explicit in job responsibilities, schedules, and budgets. Whoever is responsible for writing the self-evaluation (e.g., the program head) must have some of his/her time freed by passing off some of his/her other duties to other people, or a new person must be retained to compile the information necessary for the internal evaluation. Either way, it cannot be seen as costless.

So I'm not going to Cleveland for the time being. But I have learned from this experience how essential it is for the CIE's evaluation plan to be in place BEFORE the lead communities are selected. In that way, I am hoping the disagreements occurring in Cleveland can be avoided or set aside.

The second item is that I had a fruitful conversation with Jack Lincles and Chulamath about the intersection of the planning and execution of programs in the lead communities on the one hand, and the monitoring, evaluation, and feedback project on the other. Jack will be incorporating the results of our talk into his writing on the lead community process.

Essentially, Jack felt a need for more information, and more frequent feedback, within the lead communities, than would be forthcoming in my plan. We discussed different means for providing information, either as part of or separate from the YEP project. One interesting possibility is that the local lead-community manager would prepare a quarterly report, with the informal brief written by the field researcher as part of his/her data. Jack is working on this idea or variations. His concerns clarified for me the likely

careful in the field researcher's role, as an observer and recorder. There's also the differentiation temporally, with the field researcher's quarterly reports serving the field role, and the annual reports more like outputs (but still formative) evaluation.

We also discussed the care for standardized data across the field sites, whether in the form of process, participation, or content. The goal was to have a consistent prior, and I will pour in all that through the process. I think there are mechanisms for ensuring some standardized data collection, such as the initial training, regular contact, and frequent meetings during the field researcher's time. But this study needs more emphasis than I've given it so far.

Finally, I've asked you the field researcher's work for: the local community, or the IIR? I indicated that the field researcher's work was for the local community. Whether it's work for the IIR or the Mental Institute I was not sure. That is the current thinking or trial?

Hope all is well,  
Adam



Arm <sup>100</sup> ~~100~~ / expansion <sup>100</sup> ~~100~~

## CHIEF FIELD RESEARCHER

The Council for Initiatives in Jewish Education (CIJE) is seeking a Chief Field Researcher to lead a team of field researchers in a study of innovation in Jewish education.

Background: In response to A Time to Act, the report of the Commission on Jewish Education in North America, the CJIE is establishing approximately four "lead communities," centers of innovation in Jewish education, which will incorporate our best knowledge and efforts towards success in educating Jews in varied settings. At the same time, the CJIE will engage a team of field researchers, probably one for each site, to provide monitoring, feedback, and evaluation both as an aid to ongoing efforts in the lead communities and to inform subsequent educational policy decisions throughout North American Jewry.

Responsibilities: The Chief Field Researcher (CFR) will train, coordinate, and supervise a team consisting of approximately three other field researchers and an administrative assistant. Initially, the CFR will help prepare a detailed system of monitoring, evaluation, and feedback in lead communities, a system which will include quarterly and annual reporting. The CFR will subsequently train the other field researchers in applying the system, and will apply the system him/herself in one of the lead communities. The CFR is a full-time position; the others are part-time. The CFR will report to the CIE's director of monitoring, evaluation, and feedback, and will be guided by a national advisory board.

Requirements: Strong academic background in education or related discipline (e.g., sociology, anthropology, psychology); extensive fieldwork experience; outstanding written and oral communication skills; leadership ability and experience; ability to work as part of a team. Knowledge of Jewish education preferred but not required. Must be willing to live in one of the lead communities.

**Sales:** Approximately \$48,500, annual.

Starting date: June 1, 1992.

To apply: Send letter of application, resume (including names of references), and writing sample to:

Professor Adam Gamoran  
CIE Evaluation Project  
Department of Sociology  
1184 Observatory Dr.  
Madison, WI 53706

# MONITORING, EVALUATION, AND FEEDBACK IN LEAD COMMUNITIES: A THREE-YEAR OUTLINE

*Adam Gamoran*

University of Wisconsin, Madison

In late 1990, the Commission on Jewish Education in North America issued *A Time to Act*, a report calling for radical improvement in all aspects of Jewish education. At the center of the report's strategic plan was the establishment of "lead communities," demonstration sites that would show North American Jews what was possible:

Three to five model communities will be established to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, when the importance of Jewish education is recognized by the community and its leadership, and when the necessary funds are secured to meet additional costs (p. 67).

One year later the successor to the Commission, the Council for Initiatives in Jewish Education (CIJE), is mobilizing to establish lead communities and to carry out the strategic plan.

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

This proposal describes a plan for monitoring, evaluation, and feedback in lead communities. It emphasizes two aspects of educational change in lead communities:

(1) What is the *process* of change in lead communities? This question calls for field research in the lead communities. It requires a combination of qualitative and quantitative data, and offers formative as well as summative evaluation — that is, feedback as well as monitoring for the lead communities.

(2) What are the *outcomes* of change in lead communities? Does the project emphasize increased participation? Should we expect a rise in general Jewish literacy? Such questions are especially challenging because the specific outcomes have yet to be defined. By asking about goals in lead communities, the evaluation project will stimulate participants to think about their own visions and establish a standard by which changes can be measured in later years.

## Field Research in Lead Communities

Studying the process of change in lead communities should be a major component of the CIJE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation.

Suppose despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

*Field researchers.* A team of three full-time field researchers would be hired to carry out the field research in three lead communities. During the first year, the field researchers will be principally concerned with three questions:

- (a) What are the *visions* for change in Jewish education held by members of the communities? How do the visions vary across different individuals or segments of the community? How vague or specific are these visions? To what extent do these visions crystallize during the planning year (1992-1993)?
- (b) What is the extent of *community mobilization* for Jewish education? Who is involved, and who is not? How broad is the coalition supporting the CIJE's efforts? How deep is participation within the various agencies? For example, beyond a small core of leaders, is there grass-roots involvement in the community? To what extent is the community mobilized financially as well as in human resources?
- (c) What is the nature of the *professional life of educators* in this community? Under what conditions do teachers and principals work? For example, what are their salaries, and their degree of satisfaction with salaries? Are school faculties cohesive, or fragmented? Do principals have offices? What are the physical conditions of classrooms? Is there administrative support for innovation among teachers?

The first question is essential for establishing that specific goals exist for improving Jewish education, and for uncovering what these goals are. The second and third questions concern the "enabling options" described in *A Time to Act*, the areas of improvement which are essential to the success of lead communities: mobilizing community support, and building a profession of Jewish education.

Field researchers will address these questions in the following way:

1. Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities. For example, what are the

educational backgrounds of Jewish teachers? How much turnover exists among educators in the community?

2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.
3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system, broadly conceived.
4. Report on a regular basis to provide feedback for participants in the lead communities.
5. Write a nine-month report (May 1993) describing and interpreting the process and products of change to date. An important contribution of the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the Commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CLJE.
6. Replicate the initial data collection a year later, and continue monitoring progress toward the commission plan.
7. Issue a 21-month report (May 1994), which would describe educational changes that occurred during the first two years, and present an assessment of the extent to which goals have been achieved. Two types of assessment would be included:
  - (a) Qualitative assessment of program implementation.
  - (b) Tabulation of changes in rates of participation in Jewish education, which may be associated with new programs.

It may be possible to compare changes in rates of participation to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of supplementary school attendance after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The 21-month reports would serve as both formative and summative evaluation for the local commissions and the CLJE. In other words, they would not only encourage improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

7. Field researchers would also serve as advisers to reflective practitioners in their communities (see below).

*Schedule.* During fall 1991, a job description and list of qualifications was prepared. The researchers should be hired and undergo training during the summer and fall of 1992. During this period, further details of the monitoring and feedback system would be worked out. The fieldwork itself would begin in fall 1992.

*Director of monitoring, evaluation, and feedback.* The field researchers would be guided by a director of monitoring, evaluation, and feedback. The director would be responsible for providing leadership, establishing an overall vision for the project. Further responsibilities would include making final decisions in the selection of field researchers; participating in the training of field researchers and in the development of a detailed monitoring and feedback system; overseeing the formal and informal reports from field researchers; and guiding plans for administration of surveys and tests in the lead communities.

*Reflective practitioners.* In each lead community, beginning in 1993, two or more reflective practitioners would be commissioned to reflect on and write about their own educational efforts. (A reflective practitioner is an educator who, in addition to normal responsibilities, takes on the task of thinking systematically and writing about his or her efforts and experiences.) The reflective practitioners, who could be selected by their local councils, would be teachers or administrators involved in CIJE programs with reputations for excellent practice, or who are attempting to change their practices substantially.

The field researchers would supervise and advise the reflective practitioners.

*Collection of achievement and attitudinal data.* Although specific goals for education in lead communities have yet to be defined, it is essential to make the best possible effort to collect rudimentary quantitative data to use as a baseline upon which to build. Details of this data collection, and a plan for longitudinal follow-ups, cannot yet be specified. As an example, we might administer a Hebrew test to seventh graders in all educational institutions in the community. Seventh grade would be chosen because it is the grade that probably captures the widest participation of students who study Hebrew. The test would need to be highly inclusive, covering, for example, biblical, prayerbook, and conversational Hebrew. It may not be restricted to multiple-choice answers, in order to allow respondents to demonstrate capacity to use Hebrew as a language. The test would be accompanied by a limited survey questionnaire of perhaps twelve items, which would gauge students' attitudes and participation levels. This data collection effort would be led by a survey researcher, with assistance from the field researchers, from community members who would be hired to help administer the survey, and from specialists who would score the tests.



## **Timeline**

### *FIELDWORK*

Fall 1991

Spring 1992

Summer 1992

Fall-Spring,  
1992-93

May 1993

Fall-Spring,  
1993-1994

May 1994

### *OUTCOME DEVELOPMENT*

create job description

recruit field researchers

hire, train field researchers

fieldwork underway,  
quarterly reports,

9-month reports

fieldwork continues,  
administer surveys/tests  
quarterly reports

21-month reports

**MONITORING, EVALUATION, AND FEEDBACK IN LEAD COMMUNITIES:  
A THREE-YEAR OUTLINE**

**Adam Gamoran  
University of Wisconsin, Madison**

**October, 1991**

## MONITORING, EVALUATION, AND FEEDBACK IN LEAD COMMUNITIES: A THREE-YEAR OUTLINE

In late 1990, the Commission on Jewish Education in North America issued A Time to Act, a report calling for radical improvement in all aspects of Jewish education. At the center of the report's strategic plan was the establishment of "lead communities," demonstration sites that would show North American Jews what was possible:

Three to five model communities will be established to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, when the importance of Jewish education is recognized by the community and its leadership, and when the necessary funds are secured to meet additional costs (p.67).

One year later the successor to the Commission, the Council for Initiatives in Jewish Education (CIJE), is mobilizing to establish lead communities and to carry out the strategic plan.

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

This proposal describes a plan for monitoring, evaluation, and feedback in lead communities. It emphasizes two aspects of educational change in lead communities:

- (1) What is the process of change in lead communities? This question calls for field research in the lead communities. It requires a combination of qualitative and quantitative data, and offers formative as well as summative evaluation -- that is, feedback as well as monitoring -- for the lead communities.
- (2) What are the outcomes of change in lead communities? This question is especially challenging because the desired outcomes have yet to be defined. Hence, addressing the question requires, first, enumeration of possible outcomes, second, development of indicators for measuring selected outcomes, and third, research on the connection between programs in lead communities and the measured outcomes.

### FIELD RESEARCH IN LEAD COMMUNITIES

Studying the process of change in lead communities should be a major component of the CIJE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation. Suppose despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

**Field researchers.** At least one half-time field researcher would be hired for each community. Although budgetary and personnel constraints are likely to limit the number of researchers the CIJE is able to hire, we should be aware that the depth of monitoring, evaluation, and feedback will be related to the number of researchers supported by the CIJE. I estimate that one half-time researcher would be able to provide the level of detail described in this memo if the size of the Jewish community is approximately 50,000 or smaller.

Field researchers would have the following responsibilities:

1. Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities.
2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.
3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system, broadly conceived.
4. Prepare informal quarterly briefs which will serve as a source of feedback for participants in the lead communities.
5. Write a nine-month report (May 1993) describing and interpreting the process and products of change to date. An important contribution of the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the Commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CIJE.
6. Replicate the initial data collection a year later, and continue monitoring progress toward the commission plan.
7. Issue a 21-month report (May 1994), which would describe educational changes that occurred during the first two years, and present an assessment of the extent to which goals have been achieved. Two types of assessment would be included: (a) Qualitative assessment of program implementation. (b) Tabulation of changes in rates of participation in Jewish education, which may be associated with new programs.

It may be possible to compare changes in rates of participation to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of Hebrew school attendance after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The 21-month reports would serve as both formative and summative evaluation for the local commissions and the CIJE. In other words, they would not only encourage

improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

7. Field researchers would also serve as advisers to reflective practitioners in their communities (see below).

Schedule. During fall 1991, a job description and list of qualifications would be prepared. The researchers would be hired and undergo training during spring and summer 1992. During this period, further details of the monitoring and feedback system would be worked out. The fieldwork itself would begin in late summer or early fall 1992.

Chief field researcher. One of the field researchers would serve as chief field researcher. The chief field researcher would work full-time. In addition to studying his or her community, the chief field researcher would be responsible for training the others and coordinating their studies. S/he would also participate in developing a more detailed monitoring and feedback system.

Director of monitoring, evaluation, and feedback. The chief field researcher would be guided by a director of monitoring, evaluation, and feedback. The director would be responsible for providing leadership, establishing an overall vision for the project. Further responsibilities would include making final decisions in the selection of field researchers; participating in the training of field researchers and in the development of a detailed monitoring and feedback system; overseeing the formal and informal reports from field researchers; and guiding plans for administration of surveys and tests in the lead communities.

Reflective practitioners. In each lead community, two or more reflective practitioners would be commissioned to reflect on and write about their own educational efforts. The reflective practitioners, who could be selected by their local councils, would be teachers or administrators involved in CUE programs with reputations for excellent practice, or who are attempting to change their practices substantially. The local field researchers would supervise and advise the reflective practitioners.

Collection of achievement and attitudinal data. Although specific goals for education in lead communities have yet to be defined, it is essential to make the best possible effort to collect rudimentary quantitative data to use as a baseline upon which to build. Details of this data collection, and a plan for longitudinal follow-ups, cannot yet be specified. As an example, we might administer a Hebrew test to seventh graders in all educational institutions in the community. Seventh grade would be chosen because it is the grade that probably captures the widest participation of students who study Hebrew. The test would need to be highly inclusive, covering, for example, biblical, prayerbook, and conversational Hebrew. It may not be restricted to multiple-choice answers, in order to allow respondents to demonstrate capacity to use Hebrew as a language. The test would be accompanied by a limited survey questionnaire of perhaps twelve items, which would gauge students' attitudes and participation levels. This data collection effort would be led by a survey researcher, with assistance from the field researchers, from community members who would be hired to help administer the survey, and from specialists who would score the tests.

## DEVELOPMENT OF OUTCOMES

It is widely recognized that the question of the outcomes of Jewish education, which was

not addressed in the Commission report, cannot be avoided by the CIJE. This is not only a practical necessity, but a requirement of the research project: to evaluate the success of programs in the lead communities, one must know the criteria by which they are to be evaluated. Hence, the research project will take up the issues of (a) what are the aims of Jewish education; and (b) how can those aims, once defined, be measured?

Proposed tasks for this component of the project for the first two years are:

1. Commission a thought paper by an experienced professional on the outcomes of Jewish education. Guidelines for the paper would include:
  - (a) The focus would be concrete rather than vague. This might be accomplished by posing the question as, "If you were to evaluate the outcomes of Jewish education, what would you look at?"
  - (b) Outcomes should be addressed in the areas of cognition, attitudes, values/beliefs, practices, and participation.
2. Distribute the paper for comments to national/continental organizations for feedback.
3. Engage the original writer to expand the paper in light of feedback received from the major organizations. The revision should include an analysis of points of agreement and disagreement among the organizations.
4. Present the revised paper to the research advisory group, posing the following questions:
  - (a) What do you make of this set of outcomes?
  - (b) How might they be measured?

The research advisory group would have two additional sources of information to consider: the operative goals of programs in lead communities, as described by field researchers in their 9-month reports; and conceptions of the educated Jew developed by the Mandel Institute.

5. Commission appropriate experts to begin selecting or creating outcome indicators.

#### STIMULATION OF SELF-CONTAINED RESEARCH PROJECTS

At any time during the process, the CIJE may require urgent attention to specific issues of educational effectiveness. (An example might be the relative effectiveness of supplementary school and summer camp attendance for Jewish identification.) After developing an internal consensus, CIJE would either (1) issue a request for proposals on that topic, or (2) recruit and commission individual to carry out the research project.



### TIMELINE

	<u>FIELDWORK</u>	<u>OUTCOME DEVELOPMENT</u>
Fall 1991	create job description	commission paper
Spring 1992	oversee hiring, training	
August 1992		approve first paper
Fall-Spring, 1992-93	fieldwork underway, quarterly briefs, administer surveys/tests	responses to paper from national orgs.
May 1993	9-month reports	revise paper
August 1993		meet with research advisory committee
Fall-Spring, 1993-94	fieldwork continues, quarterly briefs	develop outcome indicators
May 1994	21-month reports	

FAX TRANSMITTAL		DATE 11-18-91	TIME
PLEASE RUSH TO	NAME Adam Gameron	COMPANY Univ. of Wisconsin	FAX NO. 608-263-6448
FROM	NAME Daniel Blum	JEWISH COMMUNITY FEDERATION 1750 Euclid Avenue Cleveland, Ohio 44115 Phone: 216-566-9200 Fax #: 216-851-1230	
PLEASE CALL IF YOU DO NOT RECEIVE ALL PAGES OR IF TRANSMISSION IS NOT READABLE.			TOTAL PAGES SENT (including this page) 4

## MESSAGE

Adam - our Nov 13 program went very well.

I'm interested in your thoughts on this revised evaluation plan. Please call when you have a chance. Thanks, Daniel

respond in a written manner

- free ...
- ...
- ...

- cost as ... partner  
(6 ...)

Jewish Community Federation  
of Cleveland

November 1, 1991

## COJC EVALUATION PROCESS

### REVISED PLAN

#### Background:

For the past three months, COJC lay and professional leadership has been engaged in determining how best to conduct an evaluation process of the work of the Commission. It is clear that there are differences both between and within constituencies as to the scope and function of this evaluation process.

There is a need to surface information that will lead to program improvement. There is also a need to further our sense of the "impact" of both individual programs and COJC as a whole. As COJC moves through its third year of implementation, it is hoped that an evaluation process will provide information to help guide ongoing planning efforts and secure future funding.

As we have moved through this process, a few other points have come into sharper focus:

\*It will be very difficult to measure impact of various programs and the Commission as a whole. In almost all cases, baseline data is unavailable and evaluation mechanisms were not built into initial program designs. Further, the programs interact with each other and operate in a complex environment with many factors at work which could be affecting change. Finally, goals have not always been articulated in a manner that lends itself to measurement.

\*A great deal of information is already known about the programs and has surfaced through agency implementation and the program panel process. Any evaluation process developed should continue to bring out and build upon this information.

\*We need to develop an evaluation process which is manageable and affordable, and will not interfere with Federation and Agencies' ability to continue to implement COJC programs.

The following proposal takes into account these points, brings focus, and "jumpstarts" the process:

**November - December 1991:**

1. Agencies would be asked to engage in a process of self-assessment of COJC programs. Assessments could include:

- (1) update of February 1991 progress report;
- (2) articulation of goals and assumptions underlying individual programs;
- (3) assessment of strengths and weaknesses of program;
- (4) discussion of issues arising through implementation;
- (5) discussion of evaluation steps currently being utilized;
- (6) listing of additional questions agency would like to learn about the program.

2. At the November 13 mini-retreat additional questions will be developed on four programs: Cleveland Fellows, In-Service Education, Project Curriculum Renewal and Retreat Institute. These questions will be passed on to staff doing assessments of these programs, and should be covered as much as possible in self-assessment.

3. Federation will convene an evaluation advisory board with representation of COJC lay leadership, professionals, rabbis, and other key groups. This board will have oversight responsibility for the evaluation process and will develop evaluation questions that exceed the scope of individual programs.

**January 1992**

1. Meetings would be held between Federation and Agency staff to discuss first drafts of the self-assessment.
2. Agencies would be asked to revise self-assessments and resubmit them to Federation by the end of the month.

**February - March 1992**

1. Revised documents would be distributed to key constituencies and outside objective evaluators for reactions and determination of areas needing clarification and additional information needed.

2. A series of panel meetings would be held to review and discuss the self-assessments, seek clarification, and determine what additional information is needed.

3. COJC professionals could be convened to engage in a similar process around the various self-assessments.

#### April 1992

Based on the above, the evaluation advisory board would make an overall determination of additional questions needing responses. These questions may relate to specific programs or to wider concerns.

The additional questions could be answered in a variety of ways. In some cases, agency staff may be asked to reconsider part of its assessment or respond to additional questions. Program panels meetings would provide another setting to work toward answers of evaluation questions.

It is likely that some questions will be determined to be too difficult or political to assess on our own. Requests for evaluation proposals could be developed and distributed to various outside evaluators. These evaluators would be asked to submit bids describing the approaches they would use to answer these questions and estimated costs.

#### May - June 1992

Commission would build on self-assessment through additional inside and outside studies. The focus would move from self-assessment to hearing from clients and constituencies.

#### Summer 1992

1. Evaluation reports would be developed and discussed. Results will be tested for agreement among various constituencies.

2. Based on above deliberations, final reports would be written and distributed.



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*University of Wisconsin-Madison  
Wisconsin Center for Education Research  
1025 W. Johnson St.  
Madison, WI 53706  
(608) 263-7575*

December 10, 1991

Mr. Daniel Blain  
Jewish Community Federation  
1750 Euclid Ave.  
Cleveland, Ohio 44115

Dear Daniel,

Thanks for sharing with me your memo of November 1, and I'm glad to hear the program on November 13 went well. I'm writing to offer my comments about the process you've initiated. My suggestions mainly elaborate on my earlier response which I conveyed over the phone.

My overall reaction is that you are proceeding wisely, given the constraints under which you are operating. Clearly it is better to begin a self-assessment now than to continue to deliberate. The specific items for assessment listed in point 1 of the memo seem appropriate, and the schedule laid out in the rest of the memo seems reasonable to me. I have four suggestions which may contribute to the effectiveness of the self-assessment:

(1) For the self-evaluation to be meaningful, the stakes cannot be overly high. Granted that those running the programs are thoughtful, intelligent, and insightful--a necessary but not sufficient condition for effective self-assessment--but no one would do an honestly critical self-evaluation if his/her job were on the line. Thus, the self-evaluations can be used only for improving programs that have been implemented, not for making decisions about the survival of programs, agencies, or positions. This needs to be clear to those doing the self-assessment and, more generally, to all those being assessed.

(2) The reason most of us do not conduct regular self-assessment is that we are too busy running our programs to have time to reflect critically or evaluate. For the self-assessment to succeed, plans for making time available must be made explicit in job responsibilities, schedules, and budgets. Whoever is responsible for writing the self-evaluation (e.g., the program head) must have some of his/her time freed by passing off some of his/her other duties to other people, or a new person must be retained to compile the information necessary for the internal evaluation. Either way, it cannot be seen as costless.

(3) Even with the best of intentions, it is realistic to expect that the self-assessment will be given lower priority than the day-to-day operations of the programs. For this reason, it is essential to have someone from the COJC who will facilitate the self-evaluations. "Facilitation" would presumably involve encouragement, reminders, guidance on where to find resources or expertise, etc. I imagine this is the role you will play at this stage of the evaluation process.

(4) It may be helpful to think of the self-assessment as a "reflective practitioner" approach.

2

Reflective practice is the notion that those carrying out the programs are often in the best position to judge the effectiveness of the programs. Alternatively, one might say the reflective practitioner has a unique and important perspective on the program, though not the only view. Reflective practice was originated in the business world, but it is highly regarded in education at present. The key reference is Donald Schon's The Reflective Practitioner.

Thanks very much for keeping me informed about the process. I am learning much that will be of value to me as I plan for evaluation of the CLJE's lead communities. Above all, I can see how important it is that we have an evaluation plan in place before the lead communities are selected.

I hope my comments are helpful to you. I'd appreciate being kept informed, and perhaps I'll have an opportunity to visit later this year.

Sincerely,



Adam Gamoran  
Associate Professor

**DRAFT -- DECEMBER 1991**

**POSITION ANNOUNCEMENT  
COUNCIL FOR INITIATIVES IN JEWISH EDUCATION**

**CHIEF FIELD RESEARCHER**

The Council for Initiatives in Jewish Education (CIJE) is seeking a Chief Field Researcher to carry out and coordinate fieldwork as part of a large-scale effort to improve Jewish education in North America.

**Responsibilities:** The Chief Field Researcher (CFR) will work with the Director of the Evaluation Project to design and implement a system of monitoring, evaluation, and feedback for "lead communities," demonstration sites for the improvement of Jewish education. The CFR will implement the system in one community, and will train, coordinate, and supervise a team of field researchers situated in three or four additional lead communities.

**Requirements:** Strong academic background in education or related discipline (e.g., sociology, anthropology, psychology); extensive fieldwork experience; outstanding written and oral communication skills; leadership ability and experience; ability to work as part of a team. Knowledge of Jewish education preferred but not required.

Salary and benefits competitive and commensurate with experience and ability.

Starting date: June 1, 1992.

To apply: Send letter of application, resume (including names of references), and writing sample to:

Professor Adam Gamoran  
CIJE Evaluation Project  
Department of Sociology  
1180 Observatory Dr.  
Madison, WI 53706

Further details on the project and the position are available.

**DRAFT -- DECEMBER 1991**

## **POSITION DESCRIPTION FOR CHIEF FIELD RESEARCHER**

The Council for Initiatives in Jewish Education (CIJE) is seeking a Chief Field Researcher to carry out and coordinate fieldwork for a major new study of efforts to improve Jewish education in North America.

### **Background**

In response to A Time to Act, the report of the Commission on Jewish Education in North America, the CIJE is establishing approximately four "lead communities," centers of innovation in Jewish education, which will incorporate our best knowledge and efforts towards success in educating Jews in varied settings. At the same time, the CIJE will engage a team of field researchers, probably one for each site, to provide monitoring, feedback, and evaluation, both as an aid to ongoing efforts in the lead communities and to inform subsequent educational policy decisions throughout North American Jewry.

### **Responsibilities**

The Chief Field Researcher (CFR) will lead the team of field researchers. S/he will report to the CIJE's director of monitoring, evaluation, and feedback, and will be guided by a national advisory board. The CFR's staff will consist of about four other (probably half-time) field researchers and a part-time administrative assistant. The CFR is a full-time position.

Preparation and training. Initially, the CFR will work with the CIJE's director of evaluation and director of planning to design a detailed system of monitoring, evaluation, and feedback in lead communities. The system will address issues of what data will be collected, who will be interviewed, the scheduling and format of interviews, reporting requirements for the project, and so on. Subsequently, the CFR will train the other field researchers to implement the system.

Field research in lead communities. The CFR will carry out fieldwork him/herself in one of the lead communities. In addition, s/he will coordinate fieldwork among all the lead communities. This will presumably involve frequent communication among the fieldworkers, as well as quarterly meetings to sort out common concerns and issues, and to draw implications that arise from the synthesis of evidence from the four or five communities.

Reporting requirements. Each field researcher will be responsible for reports at no less than quarterly intervals. Many of the quarterly reports will likely be informal briefs intended to provide constructive feedback to members of the lead communities who are administering Jewish educational programs. At least once a year, however, the report will be a formal document presented to the CIJE as part of an overall monitoring and evaluation process. The CFR will assist the other field researchers in preparing their



reports, as needed. The director of evaluation will also work with the field researchers in preparing reports.

Replication of community self-study. Each lead community will be conducting a self-study as part of the application process. In the second year (and in subsequent years) of the project, the field researchers will provide assistance as needed to see that the self-study is replicated.

Supervision of reflective practitioners. In each lead community, two or more reflective practitioners--local teachers or administrators--will be commissioned to reflect on and write about their own educational efforts. The field researchers, under the guidance of the chief field researcher, will supervise and advise these reflective practitioners.

Performance appraisals. The CFR will carry out annual reviews of the performance of the other field researchers.

[Draft: 1-30-92]

**Possible Questions for Satellite Teleconference  
on February 24, 1992**

**Program**

- . Are you interested in linkages with general education systems? For example, should public school systems be part of our coalition?
- . We are concerned about the weakness of the general education component of our day schools. Can the LC project support improvements to that part of our curriculum?
- . Do you have implicit priorities among different areas of need in Jewish education? Are there some groupings, populations, or issues that are more important than others? For example, if our community decided to focus on those now least involved -- e.g. children and non-Jewish spouses of intermarried families, elderly for whom we now have no programs, kids who have never attended -- would that be ok?
- . How do you define educational excellence?
- . What kind of "results" are you looking for? How much is "enough"?
- . Can you elaborate on what you mean by the expectation to "address both scope and quality"?

**CIJE Support**

- . What exactly can we expect from CIJE?
- . How much money can we expect you to commit, or raise for our community?
- . How can CIJE recruit leadership in our community, x,000 miles away from your offices? Don't you think it's a little presumptuous that outsiders to our community can do a better job at this than we inside, who know are community, the committed people within it ....?
- . You will be monitoring and evaluating our project. Can we be deselected on the basis of your findings? And, if so, what will be some of the grounds for such a decision?

- . What, specifically, are you looking for to document our "record of community achievement?" How will you evaluate that?
- . What if we need more time to work out coalitions? If we are bound to submission by a certain date, can we at least send in addenda/supplementary materials after the deadline?
- . How can you possibly judge a complex entity like a community based on only 6-8 pages of text (in the preliminary proposal)? That means that the community with the best writer will make the finals and it encourages all of us to lie.
- . This whole thing seems geared to the wealthiest communities. Why should anybody else bother?
- . Are we in competition with 56 other communities or only with a subset of that group that matches our "profile"? If the later, what are the elements of the "profile" -- size, wealth, location, ...?

#### **Post Selection/Other**

- . Is this a one shot deal? Will there be an opportunity for additional communities to be selected in future years? If so, when? Next year?
- . What is the seminar all about? Who will be expected to attend -- e.g., how many staff, lay leaders? Who will bear the expense?
- . What will be the responsibility of LCs for helping other communities? Who will pay for these activities?



From: Jnet%"MANDEL@HUJIVMS" 12-FEB-1992 06:20:09.32  
To: <GAMORAN@WISCSSC>  
CC:  
Subj: Re: meeting

Received: From HUJIVMS(MANDEL) by WISCAGE with Jnet id 2305  
for GAMORAN@WISCSSC; Wed, 12 Feb 1992 06:20 CDT  
Received: by HUJIVMS (HUyMail-V61); Wed, 12 Feb 92 13:23:05 +0200  
Date: Wed, 12 Feb 92 13:23 +0200  
From: <MANDEL@HUJIVMS>  
To: <GAMORAN@WISCSSC>  
Subject: Re: meeting

Dear Adam:  
I returned last night from my trip and am debriefing with myself re:  
the various meetings, lessons, ideas, progresses, problems, and  
opportunities that arose. Truly enjoyed the joint meetings with you  
and wanted to let you know in particular how helpful your clear, direct  
unequivocal style is and how helpful in framing matters accurately and without  
simplifications.

Seymour and I have begun to discuss the lead community content piece,  
butr give our schedules and commitments I believe it will take several  
weeks to complete. Will let you know when you can expect a first draft.

Seymour conveyed to you that a foundation has expressed interest in funding  
the monitoring, evaluation and feedback project. In order to enable us to  
process this further, we would need a revised 3-year budget that will reflect  
the schedule as we now anticipate it, as well as the fact that we plan to  
have 3 lead communities. Your own salary should be factored in at the current  
level for each of the 3 years. We will adjust in case of changes.

Also, as a soon as you are ready to talk or otherwise communicate about  
plans for a next visit of yours to Israel, the Mandel Instistue Institute  
will be vaery please d to consider joint plans.

Warm regards,  
  
Annette



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University of Wisconsin-Madison  
Wisconsin Center for Education Research  
1025 W. Johnson St.  
Madison, WI 53706  
(608) 263-7575

February 19, 1992

MEMORANDUM

To: Jack Ukeles and Jim Meier  
From: Adam Gamoran  
Re: teleconference

I've been thinking more about answers than questions.

(1) The question about "deselection" relates to my project although it is of course a policy decision and not one for the evaluator per se. My current thinking on the question is as follows: The monitoring and evaluation project has multiple goals. In the short term, it is probably more important as a source of feedback to both the CIJE and the community than as a tool for making in-or-out decisions. In the long term, a major concern is with learning how lead communities can successfully implement effective programs in order to diffuse innovation.

Another purpose--perhaps in the three-to-five year range--is to permit the CIJE to make informed decisions about maintaining its collaborative efforts with a particular lead community. To the extent that collaboration would actually be discontinued, the following conditions would likely be salient: Absence of mobilized community support for Jewish education; failure to generate funding needed to give programs a chance to succeed; lack of effective community-wide working relationships necessary for systemic change; large opposition to CIJE/community efforts from educational professionals in the community. These are factors that could prevent our efforts from having a chance at success; communities would not be "deselected" for having attempted programs that did not succeed despite serious efforts. *And we are trying hard to select communities in which these problems will not emerge!*

(2) "Don't you think it's a little presumptuous that outsiders..."

It is extremely important for communities to recognize that the CIJE is not imposing specific programs on the communities. Within a framework of community mobilization and improving the quality of educators, the CIJE is seeking communities that will generate their own programs to meet their specific needs. Communities should not expect the CIJE to offer a "magic bullet." On the contrary, it will take hard work from a broad coalition within the community to conceive and execute the educational improvements. CIJE will assist in this process, but will not (and cannot) impose solutions.

#1657

Fax Memorandum

TO: Adam Gamoran 608-263-6448

FROM: Shulamith Elster 301-230-2012

Council for Initiatives in Jewish Education

DATE: February 25, 1992

Number of pages: total of 2





Tuesday afternoon

Adam:

Spoke to Annette this morning. Another snow storm in Jerusalem and another 12 inches of snow closing roads, schools and even preventing a meeting of the Knesset.

She asked me to give you her regards and remind you that she awaits a revised budget and accompanying changes in the document. She is aware that you are busy these two weeks so if it is only now a matter of a few days, so be it.

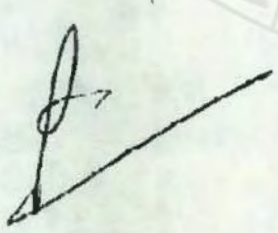
The satellite telconference went quite well yesterday. Many interesting questions from the 38 communities- lots of them about funding. I did have a chance to describe your project and I hope created some interest in the research and evaluation.

A friend, Julie Levine, is doing some work in Wisconsin regarding education and I gave him your name to contact you when next he gets to Madison. His firm does economic and social planning projects and he is a very interesting person with lots of experience in Jewish communal life including two terms- of four years each- as president of the Jewish Day school.

Regards.

Shulamith

Best regards.



# MONITORING, EVALUATION, AND FEEDBACK IN LEAD COMMUNITIES: A THREE-YEAR OUTLINE

*Adam Gamoran*

University of Wisconsin, Madison

In late 1990, the Commission on Jewish Education in North America issued *A Time to Act*, a report calling for radical improvement in all aspects of Jewish education. At the center of the report's strategic plan was the establishment of "lead communities," demonstration sites that would show North American Jews what was possible:

Three to five model communities will be established to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, when the importance of Jewish education is recognized by the community and its leadership, and when the necessary funds are secured to meet additional costs (p. 67).

One year later the successor to the Commission, the Council for Initiatives in Jewish Education (CIJE), is mobilizing to establish lead communities and to carry out the strategic plan.

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

This proposal describes a plan for monitoring, evaluation, and feedback in lead communities. It emphasizes two aspects of educational change in lead communities:

(1) What is the *process* of change in lead communities? This question calls for field research in the lead communities. It requires a combination of qualitative and quantitative data, and offers formative as well as summative evaluation — that is, feedback as well as monitoring for the lead communities.

(2) What are the *outcomes* of change in lead communities? This question is especially challenging because the desired outcomes have yet to be defined. Hence, addressing the question requires, first, enumeration of possible outcomes, second, development of indicators for measuring selected outcomes, and third, research on the connection between programs in lead communities and the measured outcomes.

## Field Research in Lead Communities

Studying the process of change in lead communities should be a major component of the CIJE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation.

Suppose despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

*Field researchers.* A team of at least two full-time field researchers would be hired to carry out the field research in three lead communities. Although budgetary and personnel constraints are likely to constrain the number of researchers the CIJE is able to hire, we should be aware that the depth of monitoring, evaluation, and feedback will be related to the number of researchers supported by the CIJE. I estimate that two field researchers would be able to provide the level of detail described in this memo if there are three lead communities with an average Jewish population size of about 50,000 or smaller.

Field researchers would have the following responsibilities:

1. Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities.
2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.
3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system, broadly conceived.
4. Prepare informal quarterly briefs which will serve as a source of feedback for participants in the lead communities.
5. Write a nine-month report (May 1993) describing and interpreting the process and products of change to date. An important contribution of the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the Commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CIJE.
6. Replicate the initial data collection a year later, and continue monitoring progress toward the commission plan.



7. Issue a 21-month report (May 1994), which would describe educational changes that occurred during the first two years, and present an assessment of the extent to which goals have been achieved. Two types of assessment would be included:

(a) Qualitative assessment of program implementation.

(b) Tabulation of changes in rates of participation in Jewish education, which may be associated with new programs.

It may be possible to compare changes in rates of participation to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of Hebrew school attendance after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The 21-month reports would serve as both formative and summative evaluation for the local commissions and the CIJE. In other words, they would not only encourage improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

7. Field researchers would also serve as advisers to reflective practitioners in their communities (see below).

*Schedule.* During fall 1991, a job description and list of qualifications would be prepared. The researchers would be hired and undergo training during spring and summer 1992. During this period, further details of the monitoring and feedback system would be worked out. The fieldwork itself would begin in late summer or early fall 1992.

*Director of monitoring, evaluation, and feedback.* The field researchers would be guided by a director of monitoring, evaluation, and feedback. The director would be responsible for providing leadership, establishing an overall vision for the project. Further responsibilities would include making final decisions in the selection of field researchers; participating in the training of field researchers and in the development of a detailed monitoring and feedback system; overseeing the formal and informal reports from field researchers; and guiding plans for administration of surveys and tests in the lead communities.

*Reflective practitioners.* In each lead community, two or more reflective practitioners would be commissioned to reflect on and write about their own educational efforts. The reflective practitioners, who could be selected by their local councils, would be teachers or administrators involved in CIJE programs with reputations for excellent practice, or who are attempting to change their practices substantially.

The field researchers would supervise and advise the reflective practitioners.

*Collection of achievement and attitudinal data.* Although specific goals for education in lead communities have yet to be defined, it is essential to make the best possible effort to collect rudimentary quantitative data to use as a baseline upon which to build. Details of this data collection, and a plan for longitudinal follow-ups, cannot yet be specified. As an example, we might administer a Hebrew test to seventh graders in all educational institutions in the community. Seventh grade would be chosen because it is the grade that probably captures the widest participation of students who study Hebrew. The test would need to be highly inclusive, covering, for example, biblical, prayerbook, and conversational Hebrew. It may not be restricted to multiple-choice answers, in order to allow respondents to demonstrate capacity to use Hebrew as a language. The test would be accompanied by a limited survey questionnaire of perhaps twelve items, which would gauge students' attitudes and participation levels. This data collection effort would be led by a survey researcher, with assistance from the field researchers, from community members who would be hired to help administer the survey, and from specialists who would score the tests.

## **Development of Outcomes**

It is widely recognized that the question of the outcomes of Jewish education, which was not addressed in the Commission report, cannot be avoided by the CIJE. This is not only a practical necessity, but a requirement of the research project: to evaluate the success of programs in the lead communities, one must know the criteria by which they are to be evaluated. Hence, the research project will take up the issues of (a) what are the aims of Jewish education; and (b) how can those aims, once defined, be measured?

Proposed tasks for this component of the project for the first two years are:

1. Commission a thought paper by an experienced professional on the outcomes of Jewish education. Guidelines for the paper would include:

- (a) The focus would be concrete rather than vague.

This might be accomplished by posing the question as, "If you were to evaluate the outcomes of Jewish education, what would you look at?"

- (b) Outcomes should be addressed in the areas of cognition, attitudes, values/beliefs, practices, and participation.

2. Distribute the paper for comments to national/continental organizations for feedback.

3. Engage the original writer to expand the paper in light of feedback received from the major organizations. The revision should include an analysis of points of agreement and disagreement among the organizations.

4. Present the revised paper to the research advisory group, posing the following questions:

(a) What do you make of this set of outcomes?

(b) How might they be measured?

The research advisory group would have two additional sources of information to consider: the operative goals of programs in lead communities, as described by field researchers in their 9-month reports; and conceptions of the educated Jew developed by the Mandel Institute.

5. Commission appropriate experts to begin selecting or creating outcome indicators.

## **Stimulation of Self-Contained Research Projects**

At any time during the process, the CIJE may require urgent attention to specific issues of educational effectiveness. (An example might be the relative effectiveness of supplementary school and summer camp attendance for Jewish identification.) After developing an internal consensus, CIJE would either (1) issue a request for proposals on that topic, or (2) recruit and commission individual to carry out the research project.

## **Timeline**

<i>FIELDWORK</i>	<i>OUTCOME DEVELOPMENT</i>
Fall 1991	create job description
Spring 1992	oversee hiring, training
Fall-Spring, 1992-93	fieldwork underway, commission paper quarterly briefs, administer surveys/tests
May 1993	9-month reports solicit responses to outcomes paper
August 1993	revised paper due meeting of advisory committee
Fall-Spring, 1993-1994	fieldwork continues, develop outcome  quarterly briefs indicators
May 1994	21-month reports

J. The role of the CIJE in establishing lead communities:

the CIJE, through its staff, consultants and projects (best practices and monitoring and evaluation) will facilitate implementation of programs and will ensure continental input into the Lead Communities. The CIJE will make the following available:

1. Best Practices

(insert)

decision makers and

Do late

2. Monitoring Evaluation Feedback

The CIJE will establish an evaluation project, ~~(unit)~~. Its purpose will be three-fold:

1. to carry out *ongoing monitoring of progress* in Lead Communities, in order to assist community leaders, planners and educators in their ~~daily~~ work. A researcher will be commissioned and will spend much of his/her time locally, collecting and analyzing data and offering it to practitioners for their consideration. The purpose of this process is to improve and correct implementation in each LC and between them.
2. to *evaluate progress* in Lead Communities—assessing, as time goes on, the impact and effectiveness of each program, and its suitability for replication elsewhere. Evaluation will be conducted in a variety of methods. Data will be collected by the local researcher and also nationally if applicable. Analysis will be the responsibility of the head of the evaluation team with two purposes in mind: 1) To evaluate the effectiveness of individual programs and of the Lead Communities themselves as models for change, and, 2) To begin to create indicators and a data base that could serve as the basis for an ongoing assessment of the state of Jewish education in North America. This work will contribute to the publication of a periodic "state of Jewish education" report as suggested by the Commission. *in the long term*
3. *The feedback-loop*: findings of monitoring and evaluation activities will be continuously channelled to local and central planning activities in order to affect them and act as an ongoing corrective. In this manner there will be a rapid exchange of knowledge and mutual influence between practice and planning. Findings from the field will require ongoing adaptation of plans. These changed plans will in turn, affect implementation and so on.

question

3. Professional services:

- a) Educational consultants to help introduce best practices
- b) Planning assistance as required
- c) Community processes

4. Funding facilitation

## **Budget Notes**

This budget assumes there are THREE lead communities.

### **Salary**

Salaries have been revised to reflect the calibre of candidates we have uncovered.

Moving expenses are for two field researchers to move to lead communities.

All items dealing with the survey/test have been moved from year 2 to year 3.

### **Travel**

Initial training: 3 persons, 2 overnight each, national average

Research travel: 2 persons, 6 trips each, 14 overnights each trip, national average

### **Supplies/Expenses**

Laptop computers and printers are for the use of the field researchers. The computers will include internal modem/fax boards.

### **Consulting**

Reflective practitioners have been postponed until Year 3.

~~A training board meeting has been postponed until early in Year 3.~~ Consulting fees have been increased slightly to accommodate consulting needs. Travel for consultants is for attending a field researcher training session.

### **Increase for Year 3**

The bulk of the increase from Year 2 to Year 3 reflects the survey research which will occur in Year 3. Additional increases reflect funds for reflective practitioners, and a 5% estimated increase in categories in which costs are likely to rise (e.g., salaries, travel).



Gam

**MONITORING, EVALUATION, AND FEEDBACK IN LEAD COMMUNITIES:  
A THREE-YEAR OUTLINE**

**Adam Gamoran  
University of Wisconsin, Madison**

**February, 1992**

## MONITORING, EVALUATION, AND FEEDBACK IN LEAD COMMUNITIES: A THREE-YEAR OUTLINE

In late 1990, the Commission on Jewish Education in North America issued A Time to Act, a report calling for radical improvement in all aspects of Jewish education. At the center of the report's strategic plan was the establishment of "lead communities," demonstration sites that would show North American Jews what was possible:

Three to five model communities will be established to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, when the importance of Jewish education is recognized by the community and its leadership, and when the necessary funds are secured to meet additional costs (p.67).

One year later the successor to the Commission, the Council for Initiatives in Jewish Education (CIJE), is mobilizing to establish lead communities and to carry out the strategic plan.

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

This proposal describes a plan for monitoring, evaluation, and feedback in lead communities. It emphasizes two aspects of educational change in lead communities:

- (1) What is the process of change in lead communities? This question calls for field research in the lead communities. It requires a combination of qualitative and quantitative data, and offers formative as well as summative evaluation – that is, feedback as well as monitoring – for the lead communities.
- (2) What are the outcomes of change in lead communities? This question is especially challenging because the desired outcomes have yet to be defined. Hence, addressing the question requires, first, enumeration of possible outcomes, second, development of indicators for measuring selected outcomes, and third, research on the connection between programs in lead communities and the measured outcomes.

### FIELD RESEARCH IN LEAD COMMUNITIES

Studying the process of change in lead communities should be a major component of the CIJE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation. Suppose despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

**Field researchers.** A team of at least two full-time field researchers would be hired to carry out the field research in three lead communities. Although budgetary and personnel constraints are likely to limit the number of researchers the CJE is able to hire, we should be aware that the depth of monitoring, evaluation, and feedback will be related to the number of researchers supported by the CJE. I estimate that two field researchers would be able to provide the level of detail described in this memo if there are three lead communities with an average Jewish population size of about 50,000 or smaller.

Field researchers would have the following responsibilities:

1. Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities.
2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.
3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system, broadly conceived.
4. Prepare informal quarterly briefs which will serve as a source of feedback for participants in the lead communities.
5. Write a nine-month report (May 1993) describing and interpreting the process and products of change to date. An important contribution of the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the Commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CJE.
6. Replicate the initial data collection a year later, and continue monitoring progress toward the commission plan.
7. Issue a 21-month report (May 1994), which would describe educational changes that occurred during the first two years, and present an assessment of the extent to which goals have been achieved. Two types of assessment would be included: (a) Qualitative assessment of program implementation. (b) Tabulation of changes in rates of participation in Jewish education, which may be associated with new programs.

It may be possible to compare changes in rates of participation to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of Hebrew school attendance after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The 21-month reports would serve as both formative and summative evaluation for the local commissions and the CJE. In other words, they would not only encourage improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

7. Field researchers would also serve as advisers to reflective practitioners in their communities (see below).

Schedule. During fall 1991, a job description and list of qualifications would be prepared. The researchers would be hired and undergo training during spring and summer 1992. During this period, further details of the monitoring and feedback system would be worked out. The fieldwork itself would begin in late summer or early fall 1992.

Director of monitoring, evaluation, and feedback. The field researchers would be guided by a director of monitoring, evaluation, and feedback. The director would be responsible for providing leadership, establishing an overall vision for the project. Further responsibilities would include making final decisions in the selection of field researchers; participating in the training of field researchers and in the development of a detailed monitoring and feedback system; overseeing the formal and informal reports from field researchers; and guiding plans for administration of surveys and tests in the lead communities.

Reflective practitioners. In each lead community, two or more reflective practitioners would be commissioned to reflect on and write about their own educational efforts. The reflective practitioners, who could be selected by their local councils, would be teachers or administrators involved in CJE programs with reputations for excellent practice, or who are attempting to change their practices substantially. The field researchers would supervise and advise the reflective practitioners.

Collection of achievement and attitudinal data. Although specific goals for education in lead communities have yet to be defined, it is essential to make the best possible effort to collect rudimentary quantitative data to use as a baseline upon which to build. Details of this data collection, and a plan for longitudinal follow-ups, cannot yet be specified. As an example, we might administer a Hebrew test to seventh graders in all educational institutions in the community. Seventh grade would be chosen because it is the grade that probably captures the widest participation of students who study Hebrew. The test would need to be highly inclusive, covering, for example, biblical, prayerbook, and conversational Hebrew. It may not be restricted to multiple-choice answers, in order to allow respondents to demonstrate capacity to use Hebrew as a language. The test would be accompanied by a limited survey questionnaire of perhaps twelve items, which would gauge students' attitudes and participation levels. This data collection effort would be led by a survey researcher, with assistance from the field researchers, from community members who would be hired to help administer the survey, and from specialists who would score the tests.

## DEVELOPMENT OF OUTCOMES

It is widely recognized that the question of the outcomes of Jewish education, which was not addressed in the Commission report, cannot be avoided by the CJE. This is not only a practical necessity, but a requirement of the research project: to evaluate the success of programs in the lead communities, one must know the criteria by which they are to be evaluated. Hence, the research



project will take up the issues of (a) what are the aims of Jewish education; and (b) how can those aims, once defined, be measured?

Proposed tasks for this component of the project for the first two years are:

1. Commission a thought paper by an experienced professional on the outcomes of Jewish education. Guidelines for the paper would include:
  - (a) The focus would be concrete rather than vague. This might be accomplished by posing the question as, "If you were to evaluate the outcomes of Jewish education, what would you look at?"
  - (b) Outcomes should be addressed in the areas of cognition, attitudes, values/beliefs, practices, and participation.
2. Distribute the paper for comments to national/continental organizations for feedback.
3. Engage the original writer to expand the paper in light of feedback received from the major organizations. The revision should include an analysis of points of agreement and disagreement among the organizations.
4. Present the revised paper to the research advisory group, posing the following questions:
  - (a) What do you make of this set of outcomes?
  - (b) How might they be measured?

The research advisory group would have two additional sources of information to consider: the operative goals of programs in lead communities, as described by field researchers in their 9-month reports; and conceptions of the educated Jew developed by the Mandel Institute.

5. Commission appropriate experts to begin selecting or creating outcome indicators.

#### STIMULATION OF SELF-CONTAINED RESEARCH PROJECTS

At any time during the process, the CIJE may require urgent attention to specific issues of educational effectiveness. (An example might be the relative effectiveness of supplementary school and summer camp attendance for Jewish identification.) After developing an internal consensus, CIJE would either (1) issue a request for proposals on that topic, or (2) recruit and commission individual to carry out the research project.

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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Cleveland, Ohio 44115  
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(Temporary Address)

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Honorary Chair  
Max M. Fisher

Chair  
Morton L. Mandel

Acting Director  
Stephen H. Hoffman

Chief Education Officer  
Dr. Shulamith Elster

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MEMO TO: CIJE Board Members and Senior Policy Advisors  
FROM: Morton L. Mandel *Mort*  
DATE: March 26, 1992  
SUBJECT: CIJE Personnel Update

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As the search for a permanent, full-time director for CIJE continues, we are making an interim reassignment of responsibilities. We have asked Shulamith Elster, who has been serving as chief education officer, to become Acting Director. She will retain her role as chief education officer, to which we are adding certain responsibilities for planning, coordination, and administration.

As you know, Steve Hoffman has served as Acting Director of CIJE, in a voluntary capacity, since November 1990. We are grateful to Steve for all he has done to help get CIJE off the ground, and we look forward to his continued involvement in CIJE as a senior consultant. We will continue to benefit from his experience and expertise, especially in the area of community organization and fundraising.

The small consultant team formed over the last year will continue to work closely with us as we forge ahead to implement the recommendations of the Commission. The Lead Community selection process is now well under way, and we will keep in touch with you as this effort proceeds.

Warmest regards.

cc: Adam Gamoran - For your information

[copy of e-mail message sent 4/25/92]

Shulamith,

I'm writing to update you on the progress of my work.

#### RECRUITMENT

Although the deadline for field researcher applications is May 11, I have already received 18 applications. None of these is the ideal candidate--an experienced early-career field researcher with knowledge of Jewish education--but so far there are one or two who may be worth considering. And of course I expect to get more applications as the deadline draws closer.

Assuming I get some viable candidates, I would like to conduct interviews in late May or, at the latest, in early June. I would like your help in conducting the interviews and making decisions. In addition, I have enlisted the aid of two colleagues who are the ideal consultants to help with the selection (and and later, the training) of the field researchers. They are (1) Gary Wehlage, my colleague at Wisconsin, who conducted the evaluation of New Futures that I wrote about; (2) Ellen Goldring, associate prof. of educational administration at Vanderbilt. Ellen has come to Vanderbilt this year after several years at Tel Aviv University, where she was a tenured faculty member in education. She has conducted numerous evaluations of schools and principals and has a strong background in Jewish education (though, like me, her research is in secular education). We should definitely try to draw her into our larger orbit of academic experts who can contribute to improving Jewish education. Ideally we could get her to work with the field researchers next year while I'm away.

Earlier this week I attended the annual meeting of the American Educational Research Association, and I spoke with numerous colleagues about the CIJE and the evaluation project. I had hoped to come away with nominees for the field researcher positions. I did not find any serious candidates, but at least I increased our visibility, and perhaps something will come through later.

#### CONTENT OF FIELD RESEARCH

I have begun reading and making notes for a memo that will identify and discuss the focus of the field research in the first year or two of the lead communities. The field researchers will have three main questions to address:

- (1) Is there a vision of improvement of Jewish education in this community? What is the vision? How does the vision differ across different segments of the community?
- (2) What is the form and extent of community mobilization for Jewish education? Who is involved? Who is left out? What financial resources have been mobilized? Is community support growing, declining, or staying the same?
- (3) What changes are envisioned or occurring for the professional lives of educators?

The memo will explain and elaborate these questions. It will defend them by drawing on A TIME TO ACT and on recent research in educational evaluation. Then it will propose methods for addressing them.

As I work on this, it has become clear that the field research will not incorporate administrative monitoring of the type that Jack has discussed. The field researchers will not be able to say on a week-to-week basis whether programs are attended or not; what people liked about the programs; etc. That will have to be part of the CLJE or local council administration. Nonetheless, quarterly feedback from the field researchers should be enormously valuable to the local council, especially regarding questions (1) and (2). Indeed, just asking question (1) will probably be a contribution, since it will stimulate people to think about this critical issue.


My current thinking about the goals issue is to return to the position I stated in Jerusalem: There is no set of clear goals for lead communities, yet it would be a mistake to base the evaluation on externally-identified goals. Instead, the goals will be uncovered from within, primarily by answering question (1) above, in a way that is sensitive to the multiple and sometimes competing goals found in any community. Subsequent years of evaluation will make reference to the early goals and will also take account of the evolution of goals over time. In light of this view, the "goals paper" described in my project proposal should be set aside, perhaps permanently.

I have not had time to deal with the testing/survey issue. Regretfully, I don't think I'm going to be able to devote the time it would take to select or construct an instrument for use in the lead communities next year. We might want to consider hiring someone to pursue this matter. It may be extremely important, but we aren't certain because we don't know what quality of instrument could be created.

Hope you had a nice Pesah, and that all is well with you.

Best,  
Adam

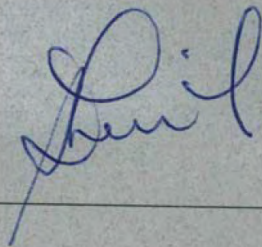




May 27, 1992

The CIJE Lead Communities Project has been compared on a number of occasions to the New American Schools Program. I thought that you would be interested in this recent article by one of the NASDC panelists.

Best regards



# A Proposal Reader on Searching for New American Schools

Continued from Page 23

that very few of the panelists at Leesburg were members of minority groups (though this apparently was not true of the Houston panelists).

The request for proposals itself also presented some problems. One of the biggest concerned the wording "world-class standards." What are world-class standards? It's difficult to ask someone to show how students can attain them if you can't define them! Therefore, rather than try to define these standards, most proposals paid no more than lip service to them. Of even more concern is that talking about attaining "world-class standards" is inappropriate in many of our urban schools, plagued by drugs, violence, and high dropout rates. It will be a long and difficult road before we manage to just transform these schools from the "second class" environments they have become. One would hope that NASDC will pay attention to "break the mold" proposals that aim to help these schools make radical and fundamental changes without immediate concern to world-class standards. As the saying goes, you have to crawl before you walk.

Nonetheless, NASDC's chairman,

Thomas H. Kean, was on target when he said, "We have sparked an unprecedented collaborative process all across the nation, on the part of American education's brightest people." The competition acted, in effect, as a giant national think tank on the design of new schools. It was truly refreshing to see proposals that includ-

velopment Corporation can look upon the establishment of such teams as part of its success.

Unfortunately, the general quality of the proposals left me disappointed. Not many of the designs really "broke the mold." The process of creating a design was very often emphasized more than providing any real sub-



Barbara Murray

ed collaborations of partners from business and industry, K-12 education, higher education, state and/or local governments, high-technology companies, consulting firms, foundations, and community organizations. It seems likely that some of these design-team coalitions will pursue their goals with or without NASDC funding. If so, the New American Schools De-

stance. These numerous "plans to plan" all require a great leap of faith on the part of a funding source. "Trust us to use this grant money to form a team which will then come up with a specific design" was a refrain heard in a great number of proposals. Design teams whose ideas were too vague, and those which had not yet garnered community support, were seen as less

likely to succeed.

Most proposals included many of today's leading-edge ideas in education. Unfortunately, many also seemed just to use these ideas as buzzwords, with little thought given to implementing them. The great majority of proposals paid little attention to instructional techniques, small, rural communities, drugs and violence, handicapped students, connections to other countries and cultures, and motivating the learner.

In its defense, the NASDC request for proposals didn't allow enough time for many groups to do the kind of preparation needed to put together a comprehensive plan. Despite this, almost every proposal had some good points in it. The best had done a good job of "packaging" ideas, and showed superior planning in regard to implementation and replication of designs, and on maintaining community support. Some of the many positive ideas in the proposals included: learning as a community activity; mentoring programs; Total Quality Management—student and community viewed as "a customer"; redefining the role and elevating the status of the classroom teacher; intergenerational learning; and performance-based assessment.

There were quite a few proposals that contained some good ideas yet had other serious deficiencies. The possibility was raised that NASDC might approach teams with complementary good ideas, and suggest they cooperate on a single design.

The final awards are to be made by the end of this month. We should hope the business community will soon open its pockets so that NASDC can raise the \$150 million more it needs to meet its funding plans. While many people might justifiably say that this money could be put to better use right now, that's not the point. At least *something* is happening in education with this process that has a good chance of producing some positive long-term results. And for the Bush Administration's education record, it's a step in the right direction.

Yet I share the concern of many of my fellow panelists that politics may rear its head in the final award process. The bottom line for selection must be the quality of the design proposal. It would be a shame if rewarding political allies and politically motivated geographic-distribution considerations left some excellent proposals without funding. When the NASDC board of directors makes its final decisions, let's hope the members put on their educator hats and leave their political baggage behind. ■

## Fax Memorandum

TO: Adam Gamoran 608-263-6448  
FROM: Shulamith Elster 301-230-2012  
Council for Initiatives in Jewish Education  
DATE: June 8, 1992  
RE: Lead Communities/Finalists

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1. The Board Lead Communities Committee, chaired by Chuck Ratner, met on Friday via telecon to select the finalists from the 23 preliminary proposals. The report of the review panels was very important to the work of the group as were the materials prepared by Jim Meier and Jack Ukeles.

2. Letters were mailed to communities today. The finalist communities are:

Ottawa  
Columbus  
Oakland  
Milwaukee  
Atlanta  
Palm Beach  
Boston  
Baltimore  
Metrowest

3. Board Committee members were:

Charles Bronfman  
Thomas Hausdorf  
David Hirschhorn  
Mark Lainer  
Melvin Merians  
Lester Pollack  
Chuck Ratner, Chair  
Art Rotman, Staff for CIJE

More detail on the next steps will follow in a few days but I did want you to be among the first to have this information. Best regards.

S.

## MONITORING, EVALUATION, AND FEEDBACK IN LEAD COMMUNITIES: A THREE-YEAR OUTLINE

*Adam Gamoran*

University of Wisconsin, Madison

In late 1990, the Commission on Jewish Education in North America issued *A Time to Act*, a report calling for radical improvement in all aspects of Jewish education. At the center of the report's strategic plan was the establishment of "lead communities," demonstration sites that would show North American Jews what was possible:

Three to five model communities will be established to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, when the importance of Jewish education is recognized by the community and its leadership, and when the necessary funds are secured to meet additional costs (p. 67).

One year later the successor to the Commission, the Council for Initiatives in Jewish Education (CIJE), is mobilizing to establish lead communities and to carry out the strategic plan.

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

This proposal describes a plan for monitoring, evaluation, and feedback in lead communities. It emphasizes two aspects of educational change in lead communities:

(1) What is the *process* of change in lead communities? This question calls for field research in the lead communities. It requires a combination of qualitative and quantitative data, and offers formative as well as summative evaluation — that is, feedback as well as monitoring for the lead communities.

(2) What are the *outcomes* of change in lead communities? Does the project emphasize increased participation? Should we expect a rise in general Jewish literacy? Such questions are especially challenging because the specific outcomes have yet to be defined. By asking about goals in lead communities, the evaluation project will stimulate participants to think about their own visions and establish a standard by which changes can be measured in later years.



## Field Research in Lead Communities

Studying the process of change in lead communities should be a major component of the CIJE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation.

Suppose despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

*Field researchers.* A team of three full-time field researchers would be hired to carry out the field research in three lead communities. During the first year, the field researchers will be principally concerned with three questions:

- (a) What are the *visions* for change in Jewish education held by members of the communities? How do the visions vary across different individuals or segments of the community? How vague or specific are these visions? To what extent do these visions crystallize during the planning year (1992-1993)?
- (b) What is the extent of *community mobilization* for Jewish education? Who is involved, and who is not? How broad is the coalition supporting the CIJE's efforts? How deep is participation within the various agencies? For example, beyond a small core of leaders, is there grass-roots involvement in the community? To what extent is the community mobilized financially as well as in human resources?
- (c) What is the nature of the *professional life of educators* in this community? Under what conditions do teachers and principals work? For example, what are their salaries, and their degree of satisfaction with salaries? Are school faculties cohesive, or fragmented? Do principals have offices? What are the physical conditions of classrooms? Is there administrative support for innovation among teachers?

The first question is essential for establishing that specific goals exist for improving Jewish education, and for uncovering what these goals are. The second and third questions concern the "enabling options" described in *A Time to Act*, the areas of improvement which are essential to the success of lead communities: mobilizing community support, and building a profession of Jewish education.

Field researchers will address these questions in the following way:

1. Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities. For example, what are the

educational backgrounds of Jewish teachers? How much turnover exists among educators in the community?

2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.

3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system, broadly conceived.

4. Report on a regular basis to provide feedback for participants in the lead communities.

5. Write a nine-month report (May 1993) describing and interpreting the process and products of change to date. An important contribution of the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the Commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CIJE.

6. Replicate the initial data collection a year later, and continue monitoring progress toward the commission plan.

7. Issue a 21-month report (May 1994), which would describe educational changes that occurred during the first two years, and present an assessment of the extent to which goals have been achieved. Two types of assessment would be included:

(a) Qualitative assessment of program implementation.

(b) Tabulation of changes in rates of participation in Jewish education, which may be associated with new programs.

It may be possible to compare changes in rates of participation to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of supplementary school attendance after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The 21-month reports would serve as both formative and summative evaluation for the local commissions and the CIJE. In other words, they would not only encourage improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

7. Field researchers would also serve as advisers to reflective practitioners in their communities (see below).

*Schedule.* During fall 1991, a job description and list of qualifications was prepared. The researchers should be hired and undergo training during the summer and fall of 1992. During this period, further details of the monitoring and feedback system would be worked out. The fieldwork itself would begin in fall 1992.

*Director of monitoring, evaluation, and feedback.* The field researchers would be guided by a director of monitoring, evaluation, and feedback. The director would be responsible for providing leadership, establishing an overall vision for the project. Further responsibilities would include making final decisions in the selection of field researchers; participating in the training of field researchers and in the development of a detailed monitoring and feedback system; overseeing the formal and informal reports from field researchers; and guiding plans for administration of surveys and tests in the lead communities.

*Reflective practitioners.* In each lead community, beginning in 1993, two or more reflective practitioners would be commissioned to reflect on and write about their own educational efforts. (A reflective practitioner is an educator who, in addition to normal responsibilities, takes on the task of thinking systematically and writing about his or her efforts and experiences.) The reflective practitioners, who could be selected by their local councils, would be teachers or administrators involved in CIJE programs with reputations for excellent practice, or who are attempting to change their practices substantially.

The field researchers would supervise and advise the reflective practitioners.

*Collection of achievement and attitudinal data.* Although specific goals for education in lead communities have yet to be defined, it is essential to make the best possible effort to collect rudimentary quantitative data to use as a baseline upon which to build. Details of this data collection, and a plan for longitudinal follow-ups, cannot yet be specified. As an example, we might administer a Hebrew test to seventh graders in all educational institutions in the community. Seventh grade would be chosen because it is the grade that probably captures the widest participation of students who study Hebrew. The test would need to be highly inclusive, covering, for example, biblical, prayerbook, and conversational Hebrew. It may not be restricted to multiple-choice answers, in order to allow respondents to demonstrate capacity to use Hebrew as a language. The test would be accompanied by a limited survey questionnaire of perhaps twelve items, which would gauge students' attitudes and participation levels. This data collection effort would be led by a survey researcher, with assistance from the field researchers, from community members who would be hired to help administer the survey, and from specialists who would score the tests.

## Timeline

### *FIELDWORK*

Fall 1991

Spring 1992

Summer 1992

Fall-Spring,  
1992-93

May 1993

Fall-Spring,  
1993-1994

May 1994

### *OUTCOME DEVELOPMENT*

create job description

recruit field researchers

hire, train field researchers

fieldwork underway,  
quarterly reports,

9-month reports

fieldwork continues,  
administer surveys/tests  
quarterly reports

21-month reports



## COMMENTARY

## Searching for New American Schools

By Mark Sherry

**A**utomobile manufacturers design and build new car models every few years. Most successful corporations review and restructure their operational models at least every few years. Yet, if you asked any group of American educators, you would likely hear that most of our schools haven't significantly changed their models since the era of the Model T Ford. That's why I was intrigued by the "request for proposals" issued last fall by the New American Schools Development Corporation, a nonprofit corporation whose mission is to underwrite the creation of new models for our schools—models whose radically new designs would create "break the mold" schools and empower our students to reach "world class" standards.

I must confess, I was skeptical. The New American Schools Development Corporation was created as part of President Bush's America 2000 program. And radically different new ideas have not been a hallmark of the Bush Administration.

Still, this one-of-a-kind competition for multi-million-dollar funding would surely inspire many creative minds to do some very serious thinking—and just *might* result in some truly inspiring proposals. The prospect of reading a proposal that would just knock my socks off (mixed with a certain patriotic sense of duty) prompted me to accept NASDC's invitation to be a nonpaid panelist at a four-day "proposal-reading marathon" in Leesburg, Va.

It was a decision that I don't regret. While my socks were never quite knocked off, I did find proposals that rekindled my optimism for the future. Despite some shortcomings (which I'll outline later) the whole process was a valuable exercise with some of the excitement and exhaustion of a treasure hunt. Our "treasures" were to be found among the 686 new-school design proposals NASDC received. And the treasures we found would share in their own treasures: a portion of the \$200 million that the New American Schools Development Corporation has pledged to raise over the next five years. (It seemed a little incongruous to me that an organization that is aiming to give away up to \$200 million would say it couldn't afford to pay the panelists, but the excitement of the whole process was enough to make me forget economic concerns.)

Panelists were recruited with specialties in education, business, management, technology, and community relations. (My specialty is educational technology.) Our task was to read and render our best judgments on which proposed efforts "had the greatest probability of contributing to the improvement of American education"—and therefore should be considered for one of the up to 30 grants that NASDC would award in the Phase I Design Effort. (NASDC isn't funded by the federal government. Funds are being raised privately. To date, only about one-quarter of the \$200-million goal has been met.)

For the proposal-reading process, the 180 panelists and 540 of the design proposals were divided among three sites: Leesburg, Denver, and Houston. (Another 146 proposals had been eliminated for being "unresponsive to the request for proposals" during a pre-screening process conducted by the NASDC staff and consultants from the RAND Corporation.) The proposals were also divided so no panelists were asked to judge those that originated in their geographic home region—to limit the possibilities of conflicts of interest. (We were instructed to disqualify ourselves from judging any proposals where a possible conflict could be construed.)

Our instructions were to focus mainly on "criterion 1" of the request for proposals: "the likelihood that the design will enable students to meet the national education goals and to attain world-class standards." In order to meet this criterion, a "break the mold" design proposal should deal comprehensively with curriculum, achievement of world-class standards, teacher training, student motivation, parental and community involvement, the regulatory environment of the school, the school's or system's relationships to other systems, and the restructuring of the organization, finances, governance, and administration of the school. A key point driven home to us was that we were not to "grade on a curve"—our standards were to be high.

Our group of 60 panelists at Leesburg were divided into six panels of 10 each. Each panel was assigned a specific group of proposals. Every proposal was read separately by three or four panel members. Each reader filled out a form that recorded his or her impressions of the strengths and weaknesses of each proposal. It was then up to this sub-panel to meet and reach a consensus on each proposal. In most cases, this wasn't very difficult. Time and time again, we rejected proposals that gave only lip service to critical issues such as school-business-community collaboration, or that otherwise failed to be responsive to the proposal request. In fact, after the first day of reading, many of us wondered if we would ever see a proposal we could call "strong" or "outstanding." The other panels seemed to be having similar experiences.

It wasn't until the second day, after reading almost 20 proposals, that we finally found one that raised our spirits: a well-rounded collaborative proposal that said to us (among other things), "We're organized, we understand the issues deeply, we've made some progress already, we've identified the right people, we've got a good handle on curriculum, training, costs, and replicability of our design." Over the next two days, whenever any of our sub-panels found a proposal they thought was "strong," we made sure all panelists read it prior to our discussing it. Most of us were so motivated to read good proposals that we also read ones that any of the other five panels considered "strong." (At first NASDC tried to limit our access to proposals assigned to some of the other panels; they later relented on this.)

Whenever a sub-panel couldn't reach consensus on a particular proposal, all members of the panel read it and discussed it. I had volunteered to be panel leader, and in that role, one of my duties was to moderate such group discussions. The strong and independent spirits of the panel members, combined with their varied backgrounds (they included state, dis-

trict, and school-level educational administrators; business and foundation executives; educational consultants; and teachers) made for spirited, stimulating sessions. This exchange of ideas from such a wide variety of perspectives was beneficial to both the evaluation process and to each of us.

By the end of the third day, we were all exhausted and ready to go home. The fourth and last day's agenda was a full-group session of all 60 panelists. Representatives from each panel presented a synopsis of the proposals their panel had chosen to recommend as possible candidates for funding. The end of our grueling four-day experience was marked by a short discussion on the general strengths and weaknesses of all the proposals. When it was time to leave, I was struck by the feeling that we had just ended a season at summer camp. Though most of us were surprised by the small number of proposals we finally recommended (the exact number is considered confidential), we had learned much—from both the proposals and the process of evaluating them.

How good was the process? While far from perfect, it was a sincere effort. NASDC was conducting an unprecedented competition for which there was no track record. To a large extent, and to the nonprofit corporation's credit, the evaluation process itself was continuously evolving throughout the four days we were there. Both the NASDC staff and their consultants from RAND were very receptive to suggestions. Yet there were some problems. Many panelists were surprised that NASDC shared with us its staff's general impressions of the proposals they had already screened—prior to our beginning our evaluations. This may have had the effect of unconsciously prejudicing some of us toward those opinions. I was also disappointed

Continued on Page 25

Mark Sherry is president of Microcase Consulting Inc. and a member of the Mecklenburger Consultant Group.

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During the first year, the field researchers will be principally concerned with three questions:

(a) What are the visions for change in Jewish education ~~held~~ by members of the communities? How do the visions vary across different individuals or segments of the community? How vague or specific are these visions? To what extent do these visions crystallize during the planning year (1992-93)?

(b) What is the extent of community mobilization for Jewish education? Who is involved, and who is not? How broad is the coalition supporting the CITE's efforts? How deep is participation within the various agencies? For example, beyond a small core of leaders, is there grass-roots involvement in the community? To what extent is the community mobilized financially as well as in manpower?



(c) what is the nature of the professional life of educators in this community? Under what conditions do teachers and principals work? For example, what are their salaries, and their degree of satisfaction with salaries? Are school faculties cohesive, or fragmented? Do principals have offices? What are the physical conditions of classrooms? Is there administrative support for innovation among teachers?

The first question is essential for establishing that specific goals exist for improving Jewish education, and for measuring what those goals are. The second and third questions concern the "enabling options" described in A Time to Act, the areas of improvement which are essential to the success of lead communities: mobilizing community support, and building a profession of Jewish education.

## Field Research in Lead Communities

Studying the process of change in lead communities should be a major component of the CIJE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation.

Suppose despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

*three*  
~~Field researchers. A team of at least two~~ full-time field researchers would be hired to carry out the field research in three lead communities. ~~Although budgetary and personnel constraints are likely to constrain the number of researchers the CIJE is able to hire, we should be aware that the depth of monitoring, evaluation, and feedback will be related to the number of researchers supported by the CIJE. I estimate that two field researchers would be able to provide the level of detail described in this memo if there are three lead communities with an average Jewish population size of about 50,000 or smaller.~~

*will address these questions in the following way:*  
Field researchers ~~would have the following responsibilities:~~

1. Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities. *For example, what are the educational backgrounds of Jewish teachers? How much turnover exists among educators in the community?*
2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.
3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system, broadly conceived.
4. *Report on a regular basis to provide*  
~~Prepare informal quarterly briefs which will serve as a source of feedback for participants in the lead communities.~~
5. Write a nine-month report (May 1993) describing and interpreting the process and products of change to date. An important contribution of the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the Commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CIJE.
6. ~~Replicate the initial data collection a year later, and continue monitoring progress toward the commission plan.~~



7. Issue a 21-month report (May 1994), which would describe educational changes that occurred during the first two years, and present an assessment of the extent to which goals have been achieved. Two types of assessment would be included:

- (a) Qualitative assessment of program implementation.
- (b) Tabulation of changes in rates of participation in Jewish education, which may be associated with new programs.

It may be possible to compare changes in rates of participation to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of ~~Hebrew school attendance~~ <sup>program participation</sup> after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The 21-month reports would serve as both formative and summative evaluation for the local commissions and the CIJE. In other words, they would not only encourage improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

7. Field researchers would also serve as advisers to reflective practitioners in their communities (see below).

*Schedule.* During fall 1991, a job description and list of qualifications <sup>was</sup> ~~would be~~ prepared. The researchers <sup>should</sup> ~~would~~ be hired and undergo training during ~~spring and~~ <sup>the</sup> summer 1992. During this period, further details of the monitoring and feedback system would be worked out. The fieldwork itself would begin in ~~late summer or early~~ <sup>and fall of</sup> fall 1992.

*Director of monitoring, evaluation, and feedback.* The field researchers would be guided by a director of monitoring, evaluation, and feedback. The director would be responsible for providing leadership, establishing an overall vision for the project. Further responsibilities would include making final decisions in the selection of field researchers; participating in the training of field researchers and in the development of a detailed monitoring and feedback system; overseeing the formal and informal reports from field researchers; and guiding plans for administration of surveys and tests in the lead communities.

*Reflective practitioners.* <sup>beginning in 1993,</sup> In each lead community, two or more reflective practitioners would be commissioned to reflect on and write about their own educational efforts. The reflective practitioners, who could be selected by their local councils, would be teachers or administrators involved in CIJE programs with reputations for excellent practice, or who are attempting to change their practices substantially.

(A reflective practitioner is an educator who, in addition to normal responsibilities, takes on the task of thinking systematically and writing about his or her efforts and experiences.)

The field researchers would supervise and advise the reflective practitioners.

*Collection of achievement and attitudinal data.* Although specific goals for education in lead communities have yet to be defined, it is essential to make the best possible effort to collect rudimentary quantitative data to use as a baseline upon which to build. Details of this data collection, and a plan for longitudinal follow-ups, cannot yet be specified. As an example, we might administer a Hebrew test to seventh graders in all educational institutions in the community. Seventh grade would be chosen because it is the grade that probably captures the widest participation of students who study Hebrew. The test would need to be highly inclusive, covering, for example, biblical, prayerbook, and conversational Hebrew. It may not be restricted to multiple-choice answers, in order to allow respondents to demonstrate capacity to use Hebrew as a language. The test would be accompanied by a limited survey questionnaire of perhaps twelve items, which would gauge students' attitudes and participation levels. This data collection effort would be led by a survey researcher, with assistance from the field researchers, from community members who would be hired to help administer the survey, and from specialists who would score the tests.

## **Development of Outcomes**

It is widely recognized that the question of the outcomes of Jewish education, which was not addressed in the Commission report, cannot be avoided by the CIJE. This is not only a practical necessity, but a requirement of the research project: to evaluate the success of programs in the lead communities, one must know the criteria by which they are to be evaluated. Hence, the research project will take up the issues of (a) what are the aims of Jewish education; and (b) how can those aims, once defined, be measured?

Proposed tasks for this component of the project for the first two years are:

1. Commission a thought paper by an experienced professional on the outcomes of Jewish education. Guidelines for the paper would include:

(a) The focus would be concrete rather than vague.

This might be accomplished by posing the question as, "If you were to evaluate the outcomes of Jewish education, what would you look at?"

(b) Outcomes should be addressed in the areas of cognition, attitudes, values/beliefs, practices, and participation.

2. Distribute the paper for comments to national/continental organizations for feedback.

3. Engage the original writer to expand the paper in light of feedback received from the major organizations. The revision should include an analysis of points of agreement and disagreement among the organizations.

4. Present the revised paper to the research advisory group, posing the following questions:

(a) What do you make of this set of outcomes?

(b) How might they be measured?

The research advisory group would have two additional sources of information to consider: the operative goals of programs in lead communities, as described by field researchers in their 9-month reports; and conceptions of the educated Jew developed by the Mandel Institute.

5. Commission appropriate experts to begin selecting or creating outcome indicators.

## Stimulation of Self-Contained Research Projects

At any time during the process, the CIJE may require urgent attention to specific issues of educational effectiveness. (An example might be the relative effectiveness of supplementary school and summer camp attendance for Jewish identification.) After developing an internal consensus, CIJE would either (1) issue a request for proposals on that topic, or (2) recruit and commission individual to carry out the research project.

## Timeline

### FIELDWORK

### OUTCOME DEVELOPMENT

Fall 1991

create job description

Spring 1992

~~oversee hiring, training~~ recruit field researchers

Summer 1992

hire, train field researchers

Fall-Spring,  
1992-93

fieldwork underway,  
~~commission paper~~  
quarterly briefs, reports  
~~administer surveys/tests~~

May 1993

9-month reports  
~~solicit responses to outcomes paper~~

August 1993

~~revised paper due~~  
~~meeting of advisory committee~~

Fall-Spring,  
1993-1994

fieldwork continues,  
~~develop outcome~~ administer surveys/tests  
quarterly reports  
~~quarterly briefs indicators~~

May 1994

21-month reports

**Mandel Institute****מכון מנדל**

Tel: 972-2-662832

Fax: 972-2-662837

**Facsimile Transmission**

To: ADAM GAMORAN Date: DEC. 15, 1993  
From: \_\_\_\_\_ No. Pages: 6  
Fax Number: 608-263-6448

DEAR ADAM,

IT WAS GOOD

TO TALK WITH YOU. HERE

IS THE MATTER I DISCUSSED  
WITH YOU.

BEST REGARDS





## MONITORING, EVALUATION, AND FEEDBACK IN LEAD COMMUNITIES: A THREE-YEAR OUTLINE

*Adam Gamoran*

University of Wisconsin, Madison

In late 1990, the Commission on Jewish Education in North America issued *A Time to Act*, a report calling for radical improvement in all aspects of Jewish education. At the center of the report's strategic plan was the establishment of "lead communities," demonstration sites that would show North American Jews what was possible:

Three to five model communities will be established to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, when the importance of Jewish education is recognized by the community and its leadership, and when the necessary funds are secured to meet additional costs (p. 67).

The successor to the Commission, the Council for Initiatives in Jewish Education (CIE), is mobilizing to establish lead communities and to carry out the strategic plan.

How will we know whether the lead communities have succeeded in creating better structures and processes for Jewish education? On what basis will the CIE encourage other cities to emulate the programs developed in lead communities? Like any innovation, the lead communities project requires a monitoring, evaluation, and feedback component to document its efforts and gauge its successes.

This proposal describes a plan for monitoring, evaluation, and feedback in lead communities. It emphasizes two aspects of educational change in lead communities:

- (1) What is the *process* of change in lead communities? This question calls for field research in the lead communities. It requires a combination of qualitative and quantitative data, and offers formative as well as summative evaluation—that is, feedback as well as monitoring for the lead communities.
- (2) What are the *outcomes* of change in lead communities? Does the project emphasize increased participation? Should we expect a rise in general Jewish literacy? Such questions are especially challenging because the specific outcomes have yet to be defined. By asking about goals in lead communities, the evaluation project will stimulate participants to think about their own visions and establish a standard by which changes can be measured in later years.

## Field Research in Lead Communities

Studying the process of change in lead communities should be a major component of the CUE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation.

Suppose, despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

*Field researchers:* A team of three full-time field researchers would be hired to carry out the field research in three lead communities. During the first year, the field researchers will be principally concerned with three questions:

- (a) What are the *visions* for change in Jewish education held by members of the communities? How do the visions vary across different individuals or segments of the community? How vague or specific are these visions? How are the visions being translated into specific goals for schools, community centers, trips to Israel, etc.? To what extent do these visions and goals crystallize as programs are being planned?
- (b) What is the extent of *community mobilization* for Jewish education? Who is involved, and who is not? How broad is the coalition supporting the CUE's efforts? How deep is participation within the various agencies? For example, beyond a small core of leaders, is there grass-roots involvement in the community? To what extent is the community mobilized financially as well as in human resources?
- (c) What is the nature of the *professional life of educators* in this community? Under what conditions do teachers and principals work? For example, what are their salaries, and their degree of satisfaction with salaries? Are school facilities cohesive, or fragmented? Do principals have offices? What are the physical conditions of classrooms? Is there administrative support for innovation among teachers?

The first question is essential for establishing that specific goals exist for improving Jewish education, and for uncovering what these goals are. The second and third questions concern the "enabling options" described in *A Time to Act*, the areas of improvement which are essential to

the success of lead communities: mobilizing community support, and building a profession of Jewish education.

Field researchers will address these questions in the following way:

1. Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities. For example, what are the educational backgrounds of Jewish teachers? How much turnover exists among educators in the community?
2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.
3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system, broadly conceived.
4. Report on a regular basis to provide feedback for participants in the lead communities.
5. Write periodic reports describing and interpreting the process and products of change to date. An important contribution to the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the Commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CUE.
6. Replicate the initial data collection a year later, and continue monitoring progress toward the commission plan.
7. Issue a report which would describe educational changes that occurred during the two years, and present an assessment of the extent to which goals are being addressed. The report would include the following:

(a) Description of the goals that have been decided upon.

This will include cognitive goals such as desired achievements in subject matter areas (e.g., Jewish history, Bible, Hebrew). Where appropriate, it will describe and attempt to measure attitudinal and behavioural goals (e.g., measures of Jewish identity, involvement in synagogue life, attitudes to Israel and to Jews throughout the world).

Every effort will be made to discover goals for a community as a whole. They will range from quantitative goals (e.g., participation rates in post-bar/hat-mitzvah education, family involvement in family education programs), as well as elements that will be agreed upon by the community-at-large (e.g., involvement in the destiny of the State

of Israel and of Jews throughout the world, increased religious observances [according to specific denominational interpretations], changing the climate of the community concerning Jewish education, increased rates of involvement in community affairs).

- (b) Monitor initial steps taken toward reaching these goals.
- (c) Qualitative assessment of program implementation.
- (d) Tabulation of changes in rates of participation in Jewish education, which may be associated with new programs.
- (e) The resources of the Mandel Institute-Harvard University Program of Scholarly Collaboration and its project on alternative conceptions of the educated Jew will be made available by the CIJE to those working on the goals aspect of the monitoring-evaluation-feedback project in the lead communities.

The faculty and staff of the religious denominations have been recruited to assist in this project. Prof. Daniel Pekarsky, a scholar in the field of philosophy of education at the University of Wisconsin, will coordinate this effort at developing and establishing goals.

Prof. Pekarsky and members of the staff of the CIJE are collecting existing examples of schools and other educational institutions in Jewish and general education, that have undertaken thoughtful definitions of their goals.

It may be possible to compare changes in rates of participation to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of supplementary school attendance after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The reports would serve as both formative and summative evaluation for the local commissions and the CIJE. In other words, they would not only encourage improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

*Director of monitoring, evaluation, and feedback:* The field researchers will be guided by a director of monitoring, evaluation, and feedback. The director will be responsible for providing leadership, establishing an overall vision for the project. Further responsibilities would include making final decisions in the selection of field researchers; participating in the training of field



researchers and in the development of a detailed monitoring and feedback system; overseeing the formal and informal reports from field researchers; and guiding plans for administration of surveys and tests in the lead communities. It will also involve coordination and integration of the work on goals that is being led by Prof. Pearsky.

*Collection of achievement and attitudinal data:* Although specific goals for education in lead communities will now be developed, it is essential to make the best possible effort to collect rudimentary quantitative data to use as a baseline upon which to build. As an example, we might administer a Hebrew test to seventh graders in all educational institutions in the community. Seventh grade would be chosen because it is the grade that probably captures the widest participation of students who study Hebrew. The test would need to be highly inclusive, covering, for example, biblical, prayerbook, and conversational Hebrew. It may not be restricted to multiple-choice answers, in order to allow respondents to demonstrate capacity to use Hebrew as a language. The test would be accompanied by a limited survey questionnaire of perhaps twelve items, which would gauge students' attitudes and participation levels. Similar efforts will be undertaken to discover appropriate achievement tests wherever they may exist. First efforts will be undertaken to encourage teams of educators to develop additional achievement tests. This data collection effort would be led by a survey researcher, with assistance from the field researchers, from community members who would be hired to help administer the surveys and from specialists who would score the tests.

December 20, 1993

Dear Seymour,

I'm confused by the document you sent me after our phone conversation. I expected a revised version of the plan we worked out last August (dated July 25, 1993, but revised and handed to you in Baltimore in August in preparation for your meeting with Hirschhorn). Instead, the document you sent is a revision of my original proposal for the MEF project, which dates back to 1991 (but was officially approved in the summer of 1992). The three years that are referred to in the title were 1991-92, 1992-93, and 1993-94. I'm not sure which three years are implied by the title in the revised document.

The document does not refer to our planned work in developing community profiles. These were originally called self-studies and were to be done by the communities, but we have now taken the lead in carrying them out. The first component is the survey of educators. A second step is to enumerate the organizations involved in Jewish education, as described in box 4, p.12 of the planning guide. We will be working on this in the spring.

The document focuses more substantially on goals than any of our previous plans. As you'll see in the next month or two, our main conclusion after the first year is that there are no cohesive goals for Jewish education in these communities. (I consider that a fine conclusion for a baseline.) But I think we are some ways away from being able to write the report that fits with what you say in item 7 on p.3 of the document. That is because so far, there are no "goals that have been decided upon." What is the time frame for this report? Which are the "two years" mentioned in item 7?

The paragraph about achievement and attitudinal data on p.5 of the document does not appear in recent versions of MEF plans. I prefer instead to advocate funding for the Shohamy assessment of day school Hebrew levels in the lead communities. So far that has not been approved, and in the plan I wrote for Hirschhorn in August, this was mentioned only briefly as a possibility.

What is the purpose of the document? If it is only to send to Mr. Hirschhorn, then I have no objection. However, I would not want to see it as the definitive plan for MEF, because it does not mention the self studies, it does not reflect my latest thinking on assessment, and I'm not sure what time period it covers.

Yours,

Adam

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**Facsimile Transmission**

To: <b>ADAM GAMORAN</b>	Date: <b>28.12.93</b>
From: <b>SEYMOUR FOX</b> <b>608-263-6448</b>	No. Pages: _____
Fax Number: _____	

Dear Adam,

I'm sorry for not answering your letter about Hirschhorn. I was involved in two weeks of intensive, important and invigorating meetings of the Mandel Institute Board.

I believe that several of your points are correct and I would like to discuss how to handle this with you. Thank you for your help.

Sincerely,

Seymour Fox

P.S. Annette and I will be sending you our suggestions for Policy Implications of the Teachers Survey in the next few days.