**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.

Box
58

Folder
6

# "Institutional Profiles Consultation Process: A Categorized Selection of Consultants' Views." Proposal drafts. Planning notes and correspondence, 1994-1995.

To:   Adam Gamoran
      Ellen Goldring
      Julie Tammivaara
      Roberta Goodman

From: Bill Robinson

*Total of 3 pages.*

Re: **Memo to MEF Team on Box4 Project**, January 22, 1994

The following are some issues of concern regarding the upcoming Institutional Profile (Box #4 on page #12 of the Planning Guide).

I.

There are three (related) conceptual issues which need to be addressed prior to developing the instrument.
   1. What is the purpose of the profile?
   2. What is the relationship of the profile to the other surveys (i.e. Educator's and Educational Leader's Survey and the planned "Market Analysis")?
   3. What role is each community to have in developing and implementing the survey in the short-term and long-term?

II.

I suggest that there could be three purposes for the Institutional Profile. In outlining these purposes, I will (hopefully) address all three conceptual issues.

   Base-line Data:
First (though not necessarily in order of importance), the profile could be used as base-line data to evaluate changes in institutional activities. The type of data one may want to assess could include the following.
   On teachers and directors:
        salary
        retention rates
        advancement
        skills
        training opportunities
        material resources
   On students:
        numbers
        retention/graduation rates
        classes available (types)
        hours of contact
   On community (i.e. Federation, JES) inputs:
        funding
        training programs
        teacher benefits
        material resources

Gaps:

Second, the profile could be used in conjunction with the Educator's (and Educational Leader's) survey and the planned Market Analysis to assess the "gaps" which exist between community needs/desires and resources/opportunities. If this is to be a purpose of the profile, then care must be taken to acquire data which matches the type of data already acquired with the Educator's (and Educational Leader's) survey. In addition, some sense of what types of data will be collected in the Market Analysis must be known ahead of time for the same reason.

In other words, since the Educator's survey asks "what sorts of things would encourage you to consider full-time employment" (page 11), the institutional profile should assess the availability of these resources/opportunities. Similarly, IF the Market Analysis is to be used (at least in part) to examine what things are important to parents in choosing to send their kids to a Jewish educational institution, then the institutional profile must explore the availability of these "things". The following are some tentative items which may be important to assessing the "gaps".

In reference to the Educator's Survey:
- salary & benefits
- professional training requirements and opportunities
- location (ease of travel)
- formal and informal teacher interaction times
- upward mobility within the institution
- affiliation/ideology
- requirements for hiring and advancement (degrees, education, employment experience, other)

In reference to the planned Market Analysis:
- costs and availability of scholarship money
- location (ease of travel)
- image of school (director's abilities, educator's abilities/expertise, quality of programs)
- hours of schooling
- availability of supplementary programs after school hours and in the summer (or even special programs - camps, Israel...)

Community Mobilization:

Third, the research could be used to mobilize the communities in both the short-term and the long-term.

1. In the short-term, the communities could be mobilized by engaging them in developing the instrument (i.e. what types of data do they think is important to collect, how should it be collected and disseminated). Engaging in this "bottom-up" process could have the added benefits of creating "reflective practitioners", making more concrete the "partnership" between CIJE and the communities, and facilitating long-term change.

2. By long-term change I am referring the expansion of community-based research capacities. The purpose of the institutional profile would be to illustrate to the communities the

benefits of continuing to gather the aforementioned data long after CIJE curtails its direct involvement, and to set-up the institutional procedures and resources to accomplish this.

Notably, if the profile is to be used to acquire base-line data (the first purpose), then developing a self-sustaining, community research capacity is essential.

## III.

These conceptual issues raise three practical concerns.

1. Timing: To mobilize the communities and to match the Institutional Profile with the planned Market Analysis requires significant expenditures of time before the instrument can even be used. (For instance, in terms of the latter, interviews or focus groups with parents to ascertain what "things" go into their educational decisions seems appropriate.) Moreover, in developing a time-line for the project, community schedules will have to be taken into account.

2. Agenda: To mobilize the communities requires placing research squarely on the CIJE-community agenda. One-to-one interactions between field researchers, community leaders (e.g. Janice and Lauren in Atlanta), and educational leaders could only mobilize the community so far. The community leaders need to feel that research is a CIJE priority and integral to its other components. However, this shouldn't be done in a manner which inhibits the community's sense of "ownership" of the process.

3. Inter-Community Relations: If research is to be seen as a process of community mobilization (as suggested above), inter-community relations becomes an significant issue. During the research process, community differences may arise in terms of what types of data are deemed important to collect, the timing of the implementation, and which central agencies are to be involved. The degree to which the communities should integrate their approaches and work together on this project requires careful consideration.

call from WR   2/18/94

— J & R wr memo on how to
proceed w/ mob z

— B wr memo on short & long term
profiles

— q - data dep on purpose
— A6 — all 3 purposes
— q - for long term - stdy u stats
more in depth
— ncl capabl to mobilize
— A6 — yes!
— q - how rationalize data collec to commit
— w/ propos

Lead Community Institutional Profiles

A Proposal

I. Rationale

> Our goal should be to make it possible for every Jewish
> person, child or adult, to be exposed to the mystery and
> romance of Jewish history, to the enthralling insights and
> special sensitivities of Jewish thought ... Education, in
> its broadest sense, will enable young people to confront the
> secret of Jewish tenacity and existence, the quality of
> Torah teaching which fascinates and attracts irresistibly.
> They will then be able, even eager, to find their place in a
> creative and constructive Jewish community.
>
> Professor Isadore Twersky
> A Time To Act, p.19

By acting as a catalyst for systemic change within the Lead

Communities, CIJE has endeavored to reach this vital goal of

creating committed and educated Jews. The efforts of CIJE have

focused on encouraging the Lead Communities to engage in three

fundamental tasks. First, their lay leadership must be mobilized

in pursuit of improving Jewish education. Second, they need to

develop and implement community-wide plans for building a

profession of Jewish education. Third, they must realize the

importance of the critical role that visioning should play in

planning for Jewish education.

These tasks focus on improving Jewish education through

creating change at the community level. However, the success of

these tasks will rest greatly upon the ability of individual

educational institutions to meet the challenges ahead. The

systemic communal change envisioned by CIJE necessitates that

systemic change will occur also on the institutional level.

In general, community planning must take into account the quality and extent of institutional capacities for implementing community goals. More specifically, in building a profession of Jewish education, institutional level constraints must be addressed. For instance, do educational institutions have the resources to enable educators to take advantage of training opportunities and the means to evaluate the impact of training in the classroom?

To accomplish CIJE's goal of creating committed and educated Jews, both CIJE and the Lead Communities require greater knowledge about educational institutions. Therefore, the MEF team proposes that research should be undertaken to increase the knowledge available on both formal and informal educational institutions. This project lies within the overall mission of the MEF team to assist the Lead Communities in becoming more evaluation-minded. It will encourage in the Lead Communities an ongoing process of self-study

> to provide commission members with an increasingly solid
> foundation of information, to enlighten even the most
> knowledgeable insider, and to identify the critical issues
> and choices the commission may choose to address. It will
> also help move the community towards establishing standards
> of achievement that the community aspires to. (Lead
> Communities Planning Guide, p.10).

The Institutional Profiles will provide data useful on both a community and an institutional level. It will be designed to serve two basic purposes.

First, the Institutional Profiles will gather data for use in evaluating the community's progress in developing effective

formal and informal educational institutions. It will allow those
concerned to assess the nature and extent of change occurring
within institutions. However, in developing this evaluation
capacity within the Lead Communities, it is crucial that the
Institutional Profiles be designed and implemented in a manner
that facilitates their continual, periodic use by the Lead
Communities.

Second, the Institutional Profiles will provide a means of
discerning those crucial issues that need to be addressed in
developing more effective educational institutions. There are two
levels to this purpose.

1. The Institutional Profiles can be used at the communal level
   to assess the existence of gaps between community needs and
   institutional resources. Moreover, based on this
   information, community priorities can be established based
   on a realistic assessment of the extent of work that will be
   required to reach alternative goals. Specifically, the data
   obtained could be employed by the communities in "mapping"
   their current situation, as a step toward developing their
   Personnel Action Plans.

2. The Institutional Profiles can be used at the level of
   individual educational institutions to assess where they are
   in relation to the goals which they are envisioning for
   themselves. As with communities, before an institution can
   proceed to realize its goals, it must begin by taking stock
   of where it stands now. Only then, can institutional
   priorities be determined based upon a realistic assessment
   of the amount of time and effort that will be needed to
   accomplish alternative tasks.

In concert with these two purposes, the Institutional
Profiles could be employed to facilitate increased community
mobilization. Initially, this will be accomplished by including
personnel from each Lead Community in the designing and
implementation of the Institutional Profiles. Subsequently, the
community personnel will be engaged in the analysis of the data

and in drawing pertinent conclusions from the analysis.

This inclusion of personnel from communal agencies and educational institutions in all aspects of the process may contribute toward increased planning being undertaken by lay leaders and professionals within the Lead Communities. Finally, the project could illustrate to the communities the importance of engaging in an ongoing process of information gathering, analysis, planning and evaluation.

II. The First Stage - Development of Alternative Conceptualizations.

The types of information that could be collected on educational institutions are both varied and numerous. Even the selective list of items set forth in the Lead Community Planning Guide (Box 4) illustrates the enormity of the task ahead. Therefore, the MEF team needs to determine the types of information that is most useful in fulfilling the above stated purposes of the project. To accomplish this, we propose the MEF team engage in an interview study.

This will involve conducting interviews with funders, academicians, educational practitioners, rabbis, communal service personnel, and lay leaders at the international, continental and local levels. Participants in this study will represent expertise in both formal and informal educational settings. Analysis of these interviews will yield alternative models for designing and producing institutional profiles.

## Procedure and Timeline

Develop and field test interview protocol ------ March 1994
Select participants --------------------------- March 1994
Conduct interview (telephone or in person) ----- April 1994
Transcribe interviews ------------------------- May 1994
Analyze interviews ---------------------------- June 1994
Write conceptual paper ------------------------ July 1994
Selection by CIJE of conceptual model --------- August 1994


III. The Second Stage - Development of design and implementation of Institutional Profiles project.

Once an appropriate conceptualization is approved, the MEF team will design the instruments, develop an implementation process, suggest approaches for analyzing the data and propose appropriate products to be written. This will be undertaken in conjunction with both the CIJE and the Lead Communities.
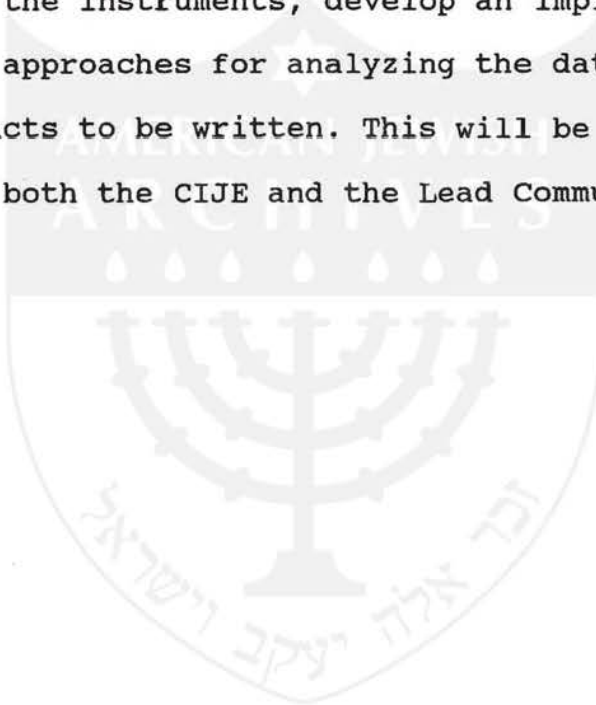
To: Adam Gamoran
    Ellen Goldring

From: Bill Robinson
      Roberta Goodman
      Julie Tammivaara

$\underline{5}$ pages to follow

Re: Plan for Developing <u>Institutional Profiles</u>

The following document is concerned with nature of the proposed
<u>Lead Community Institutional Profiles</u> and the process by which
they will be developed and implemented. Per Adam's fax (2/15)
summarizing his meeting with the advisors, we have been asked to
conceive a long-term study of educational institutions. Moreover,
we have been requested to situate a short-term quantitative
survey within this larger project. The following document details
the field researchers' proposed plan in regard to both elements.

Adam + Ellen,

I will be faxing you a personal
addendum to this proposal (in a day
or so) which delineates some additional
(or alternative) ideas regarding the project.

Bill

_take off ri j-sit_

## Lead Community Institutional Profiles

### I. Background

According to the Lead Community Planning Guide (p.10), it was envisioned that the lead communities would engage in a process of self-study

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

In this process, the CIJE would act as "a resource for designing and carrying out the self-study, as well as disseminating findings and new products".

The proposed Institutional Profiles will serve to promote this process of on-going self-study. In particular, it will serve to gather base-line data for use in evaluating the community's progress in developing effective educational institutions. This will be accomplished in two stages, employing two separate instruments: the Institutional Characteristics Survey and the Institutional Practices Survey.

### II. Description

#### A. Institutional Characteristics Survey

The Institutional Characteristics Survey will be designed to gather data in quantitative form providing a broad overview of the educational institutions (both formal and informal) within each community. This component of the Profiles is intended as a tool of self-study to be employed by the institutions on an annual basis. The type of data which will be collected will be determined by its appropriateness in fulfilling this purpose.

_biennial_

_qq ..._

The content of the Institutional Characteristics Survey will include the items delineated in "Box 4" of the Lead Communities Planning Guide, as well as additional information such as the mission and governing structure of each institution. The structure of this survey is envisioned as follows:

_where does mission & gov str ..._

1

1. Organizational
    a. type of institution (e.g. congregational school, day school, JCC, camp, retreat center, youth organization)
    b. denomination affiliation/membership
    c. mission/goals
    d. board governance
    e. leadership of educational director
    f. administrative structures
    g. communication with parents
    h. relations with other agencies

2. Learners
    a. enrollment and graduation rate
    b. age range
    c. degrees/certificates offered
    d. institutional transitions (from where & to where)
    e. participation in other programs

3. Educators
    a. numbers of full- and part-time
    b. areas of expertise/specialization
    c. qualifications
    d. religious affiliations
    e. turnover/retention rates
    f. professional development (evaluation procedures, in-house services and use of external programs)

4. Curriculum/Program Components
    a. subjects taught
    b. duration
    c. methods
    d. curriculum development

5. Resources
    a. support staff
    b. library
    c. computer systems
    d. public staff spaces
    e. student services
    f. building capacity
    g. publicity

6. Finances
    a. sources and amounts of income
    b. expenses/budget

2

## B. Institutional Practices Survey

The Institutional Practices Survey will be designed to gather data in mostly qualitative form providing a more focused and richer view of the educational institutions (both formal and informal) within each community. This component of the Profiles is designed as a tool of self-study to be employed on a periodic basis of greater length (i.e., every four to six years) than the Institutional Characteristics Survey. It will be designed to bring together institutional lay leadership, senior staff and educators in the process of completing the survey. The survey will engage the participants in:

less freq

1. examining and refining their institutional goals,
2. evaluating the weaknesses and strengths of their institutions, and
3. discovering the possibilities for change.

The Institutional Practices Survey will provide an in-depth analysis of those practices deemed to be most important in developing effective educational institutions. However, the precise content of this second survey, and therefore its method of implementation, will only be determined after the field researchers complete an interview process designed to develop a conceptual framework for the instrument.

The field researchers will conduct telephone interviews with CIJE personnel, selected central agency personnel within the lead communities, educational funders, and outside experts in Jewish education. The following questions have been developed to guide the interview process.

1. If you wanted to learn about an educational institution/organization, what are the things that you would need to know to get a picture of that institution/organization? [What are the components of an educational institution?]
2. What distinguishes an effective educational institution/organization?
3. From your perspective, what needs to be improved in Jewish education?
4. What would you need to know to improve a specific Jewish educational institutional/organizational setting? [e.g., mission, personnel, governance, funding, curriculum, resources]

The interview process will culminate in a memo which will be shared with CIJE personnel. The memo will include a systemic conceptualization of educational institutions, a rationale for using this particular conceptualization and implications for developing indicators. This memo will then guide the construction of the Institutional Practices Survey.

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*Too ambitial (*

III. Plan of Action [with time periods]

1. Develop and conduct the <u>Institutional Characteristics Survey</u>.

   a. Develop the survey instrument and the implementation procedures. [March - April 1994]
   b. Implement the survey. [May - June 1994]
   c. Analyze the data and write a paper summarizing the analysis. [July - October 1994]
   d. Disseminate the paper to communities. [October 1994]

2. Conduct the interviews designed to develop the <u>Institutional Practices Survey</u>. [April - May 1994]

   a. Collect suggestions as to which experts on Jewish education and funders of Jewish education should be interviewed. Based on these suggestions, compile a list of prospective interviewees.
   b. Notify all prospective interviewees of our desire to interview them over the phone (unless they are local) and provide them with a list of the interview questions to provoke thought beforehand.
   c. Conduct the interviews.
   d. Analyze the interviews and write a memo to be shared with CIJE personnel, suggesting certain ways of conceptualizing a Jewish educational institution, a rationale for these conceptualizations, and the implications for developing indicators.

3. Develop and conduct the <u>Institutional Practices Survey</u>.

   a. Develop the instrument and the implementation procedures. [June - September 1994]
   b. Implement the survey. [October - January 1995]
   c. Analyze the data and write a series of papers (one for each participating institution) combining the analyzed data from both surveys. This final product will entitled the <u>Institutional Profiles</u>. [December - April 1995]
   d. Disseminate the papers to the communities. [May 1995]

4

IV. Time-Line


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                              1994                   1995
                              M  A  M  J  J  A  S  O  N  D  J  F  M  A  M
1. Instit. Characteristics
   Survey -
   1a. Develop survey:        xxxxxx
   1b. Implement survey:          xxxxxx
   1c. Analyze data &
       write paper:                      xxxxxxxxxx
   1d. Disseminate paper:                         xx

2. Conduct Interviews:           xxxxxx

                              1994                   1995
                              M  A  M  J  J  A  S  O  N  D  J  F  M  A  M
3. Instit. Practices
   Survey -
   3a. Develop survey:                xxxxxxxxxxx
   3b. Implement survey:                     xxxxxxxxxxx
   3c. Analyze data &
       write paper:                             xxxxxxxxxxxxxx
   3d. Disseminate paper:                              xx
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5

To: Adam Gamoran
    Ellen Goldring

cc: Julie Tammivaara
    Roberta Goodman

From: Bill Robinson

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Re: Addendum to the Institutional Profiles Proposal


    The Institutional Profiles Proposal was the result of a
consensus reached among the three field researchers. For the most
part, it represents those elements which could be agreed upon by
all three of us. Thus, there are elements in my initial drafts
which were not included in the final version. Per Julie's
suggestion, I decided to write this separate memo. It serves two
purposes:
1. to delineate those excluded items which I believe warrant
   additional consideration in the future;
2. in so doing, to describe some of the reasoning through which
   we arrived at the final draft;
3. to raise some concerns I still have regarding the current
   proposal.

    In preparing this memo I realized that I could not discuss
adequately the excluded items without addressing certain key
issues regarding the Proposal. The memo will focus on three key
issues:
A. the papers to be written based on the two surveys;
B. the content of the Institutional Characteristics Survey;
C. the purpose (rationale) of the project.


A. Concerning the papers to be written based on the two surveys:

    The current proposal for the Institutional Profiles mentions
that a paper or papers will be written at two points in the
project:
1. following analysis of the data obtained from the
   Institutional Characteristics Survey, a paper will be
   written summarizing the analysis (see 1.c. in the Plan of
   action);
2. following analysis of the data obtained from the
   Institutional Practices Survey, a series of papers (one for
   each participating institution) will be written combining
   the analyzed data from both surveys (see 3.c. in the Plan of
   Action - these papers will be called the Institutional
   Profiles).

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This current situation represents a compromise among the field researchers. Roberta and Julie have acceded to my suggestion that a paper be written providing a community-level summary of the data obtained from the Institutional Characteristics Survey. (In practice, this will result in three papers - one for each community.) However, the field researchers could not reach agreement on the need to write a community-level summary of the data obtained from the Institutional Practices Survey. Thus, there are currently no plans to do so. Moreover, there are currently no plans to write a community-level summary combining the data from both surveys and incorporating policy implications.

In an earlier draft, I had delineated a process for the Institutional Profiles which would mirror the work being done on educators. Three papers (reports) were envisioned:
1. a community-level summary of the (quantitative) data obtained from the Institutional Practices Survey (only this item remained in the final draft);
2. a community-level summary of the (mostly qualitative) data obtained from the Institutional Practices Survey;
3. an integrated report containing policy implications (entitled Community Profile of Institutional Resources).

Part of the debate on this issue revolved around the intended purpose/audience for the papers. Writing separate profiles (papers) for each institution could be useful in assisting each institution in evaluating its own effectiveness. Distribution of these individual profiles to central agency personnel may also prove somewhat helpful. However, individual profiles would not be very useful for community-level planning.

If one purpose of the project is to assist central agency personnel in planning, then it is advisable that they receive a document which maps total community resources. This purpose seems to be explicitly stated on page 10 of the Planning Guide (and is quoted in the beginning of our current proposal). Moreover, the minutes of the CIJE Lead Communities Seminar in Montreal (Appendix I) specifically discuss the "mapping" process which lead communities should undertake in preparing their action plans. Finally, it seems that CIJE would also appreciate an overall map of community institutional resources and activities.

B. Concerning the content of the <u>Institutional Characteristics</u>
   <u>Survey</u>:

As written, the proposal draws a wide net over the type of
quantitative data to be included in this first survey. It
includes (almost) all the items listed in Box 4 of the <u>Planning</u>
<u>Guide</u>, as well as additional items suggested during our last
conference call (governance), by Adam in his last fax (mission,
parent involvement), and by each of the field researchers (in
particular: curriculum development, building capacity, publicity,
leadership, institutional transitions and participation in other
programs).

The amount of sub-categories already listed is probably
already too large to include within a single survey, as each
contains within it several possible items. Currently, there are
two criteria mentioned in the proposal which could be used to
refine the survey. Under section I, it states that the
<u>Institutional Profiles</u>
       "will serve to <u>gather base-line data</u> for use in evaluating
       the community's progress in developing effective educational
       institutions".
In section I, it states that the <u>Institutional Characteristics</u>
<u>Survey</u>
       "is intended as a tool of self-study to be employed by the
       institutions <u>on an annual basis</u>".
These two criteria are essentially one. The current purpose of
this first survey is solely to gain data which can illustrate
significant change (or lack thereof) on a yearly basis.

However, if we were solely to employ this criterion certain
items included in Box 4 would be eliminated (i.e. affiliation,
subjects, activity duration, support resources, major sources of
revenue), as well as items we have added (i.e. mission,
governance, parent involvement). While most of these items will
change over time, they would not be expected to change on a
yearly basis. Nevertheless, some of these "additional" items
could be considered vital depending on the purpose of the surveys
(i.e., to gain a community-level understanding of the
institutional resources and activities?).

There are three possible solutions to this problem:
1. still include these "additional" (non-yearly) items in the
   first survey (the <u>Institutional Characteristics Survey</u>);
2. include these "additional" items in the <u>Institutional</u>
   <u>Practices Survey</u>;
3. include these "additional" items in another survey which has
   not yet been planned.

Two issues need to be considered in this decision. Which
option poses the least additional burden on the field researchers
and on the educational directors who will be filling out the
surveys? Would inclusion of these "additional" items in either of

3

the planned surveys pose  conceptual difficulties which cannot be adequately mitigated?

I believe that the first option is the best. It is the least burdensome to both the field researchers and the educational directors.  Notably, the <u>Institutional Practices Survey</u> is intended to gather a  more focused amount of data  on educational institutions in  mostly qualitative form.  If we want  to collect some general information on these "additional" items  (i.e., subjects, activity duration, support  resources, major sources of revenue, mission, governance, parent involvement) in quantitative form, then the  first survey  seems  the most  appropriate means toward  that end. The fact  that these "additional"  items do not change  on  a yearly basis  should  not prove too conceptually problematic.  Conceptual and  logistical problems  could be mitigated  by developing  an  instrument with  two sections:  one which is  repeated every year  and a supplementary  section which changes depending on the needs of the community at the time.

Of course, choosing the first option will not  eliminate the original  problem (i.e., too  many items already  planned for the survey).  The list of items  which could be  examined through the <u>Institutional Characteristics Survey</u> needs to  be refined. However, we must consider carefully the criteria to be  employed in eliminating items. The criterion of gathering (base-line) data to evaluate institutional  change on a yearly basis  may not be appropriate  by itself. Additional  criteria  may  need to  be included.  In particular,  one additional  criterion - to assess "gaps"  between community needs and resources  in order to assist in  the community planning process - was mentioned in my original memo on the project.

This  raises an additional  concern about  the order  of the elements in the proposed plan of action. Currently, the  proposal indicates that  the development  and implementation of  the first survey will take place before  the interview process (designed to determine  what  is  important  to examine  in  an  educational institution)  is  completed. In  an  earlier draft  (and  in conversation with Adam on 2/18),  I  suggested that  the  first survey  follow completion  of the  interview process.  This would provide  us with  the  needed additional  criteria for  selecting which  items to include in the first survey (as discussed above). The drawback of the  earlier draft is that the  implementation of the first survey will then be delayed, possibly until the summer. A summer  implementation may  pose logistical  difficulties since schools will be closed.

One  must carefully  weigh the  costs and benefits  of this decision. If we could decide upon additional criteria without the interview process  then the <u>Institutional Characteristics Survey</u> could be implemented prior to completing the interview process.

4

C. The purpose (rationale) of the project:

   In both sections above, similar issues were raised.
   1. Concerning the papers to be written based on the surveys, I
      pointed to the need to determine the purpose/audience for
      the papers. Specifically, will the papers be directed only
      toward individual institutions or toward central agency
      personnel to assist in their planning process?
   2. Concerning the content of the first survey, I pointed to the
      need to develop additional criteria in order to select which
      items should be included in the survey. Consequently, I
      suggested that the decision to implement the first survey
      prior to the interview process should only be taken if these
      additional criteria can be ascertained without the interview
      process.

   Seemingly, this last issue of rationale should be the least
important. Rationale are often used a window dressing to entice
support for the project. However, in this project they could
serve a more fundamental function - to refine the purpose of the
project. In so doing, we would obtain a clearer and more
comprehensive set of criteria by which to determine which papers
need to be written and which items should be included in the
surveys.

   In an early draft of the proposal, I included a wider range
of rationale for the Profiles. These were listed as follows.
(Only the first two remained in amended form in the final draft.)

   "The Lead Community Institutional Profiles will be utilized:
   1. to fulfill and extend CIJE's goal of developing within the
      lead communities "an ongoing process of serious self-study";
   2. to gather base-line data which would be used at a later
      point to evaluate changes in institutional demographics and
      practices;
   3. to assess the gaps which exist between available
      institutional resources and
         a. the needs of the educators
         b. the needs of parents and students
         c. the goals of the respective institutions
         d. the goals of the respective communities and CIJE
      (as part of the mapping process to be undertaken by the lead
      communities in preparation for developing their Personnel
      Action Plans);
   4. to assess the institutional capacity to act in pursuit of
      any desired goal;
   5. to facilitate the development of reflective institutions
      (where key personnel think systematically about the
      processes which occur within their institution as selected
      goals are pursued);
   6. to develop a sense of institutional potential and
      accountability."

5

There seems to be four questions one should ask in
determining which set of rationale for the project is more
appropriate. The team discussed each of these but reached no
consensus.
   a. Are the additional four functions already included in the
      first two?
   b. Will the inclusion of the additional four functions
      facilitate or hinder the reception of the Institutional
      Profile Proposal among CIJE personnel (and possibly LC
      personnel)?
   c. Does the exclusion of the additional four functions
      represent a diminished or realistic view of the possible
      uses for which the Institutional Profiles could be employed?
   d. Will the inclusion of the additional four functions
      facilitate or hinder the ability of the field researchers to
      design and implement the Institutional Profiles?


      I hope this memo proves helpful to you in understanding
      the Institutional Profiles proposal and the process
      through which it was written. I would appreciate any
      comments you have on the proposal, the addendum and the
      process.

                                                    Bill


6

### Institutional Profiles: a proposal

According to the Planning Guidelines, an institution or program profile project shall be undertaken to obtain reliable information about educational institutions and programs in the lead communities. The assumption is that "as the community learns more about itself, its decision-making will improve, p. 10." In conversation amongst ourselves and with others, we now recognize that there are many possible purposes, configurations, uses, and audiences for something called an institutional, program [or community] profile.

To discover the most appropriate conceptualization and, ultimately, design for this project, we propose a two-stage process:  development of alternative conceptualizations and development of design and implementation of Institutional Profiles Study.

1. Development of alternative conceptualizations.

The MEF team needs to clarify both the reasons for embarking on this endeavor and determine the kinds of information that will be most useful to the LCs as they progress toward improving Jewish education. In particular, we need a better understanding of the ways in which and the audiences for which the institutional profiles will be helpful.  To accomplish these purposes, we propose the MEF team conduct an interview study.

We will conduct interviews with funders, academicians, educational practitioners, rabbis, communal service personnel, and lay leaders at the international, continental and local levels. Participants in this study will represent expertise in both formal and informal educational settings. Analysis of these interviews will yield alternative models for designing and producing institutional profiles. We propose the following procedure and timeline:

Procedure and Timeline

| Develop and field test interview protocol | March 1994 |
| Select participants | March 1994 |
| Conduct interviews [telephone or in person] | April 1994 |
| Transcribe interviews | May 1994 |
| Analyze interviews | June 1994 |
| Write conceptual paper | July 1994 |
| Selection by CIJE of conceptual model | August 1994 |

2. Development of design and implementation of Institutional Profile project.

Once the an appropriate conceptualization is approved, the MEF team will propose a procedure, develop instruments and other data collection strategies, suggest analytic approaches and propose appropriate products. This will be undertaken in conjunction with both the CIJE and the Lead Communities.

```
GAMO$ type wrkplncmt.wr
From:    EUNICE::"74104.3335@CompuServe.COM" 31-MAR-1994 18:32:38.66
To:      Adam Gamoran <gamoran>, Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>,
         Unknown CompuServe address <Postmaster@CompuServe.COM>,
         Unknown CompuServe address <Postmaster@CompuServe.COM>
CC:
Subj:    Comments on MEF Work Plan
```

Adam,


The following are my comments on the tentative MEF work plan.
They are in two parts - a brief suggestion on the monitoring and
evaluation of PAPs and a longer discussion of the time line for
Institutional Profiles.


Monitoring and Evaluation of Personnel Action Plan -
    Should we not also be concerned about who are the people
involved in the process? Are educational professionals and lay
people included? Are different councils/institutions involved
(inside and outside of the Federations)? Does this represent a
broad spectrum of people in the community?
    Obviously, this edges into mobilization issues. However,
they are important aspects of the PAP process that will affect
its relative success in each community. It seems that all ongoing
monitoring projects will overlap somewhat in content.


(Suggestive) Time Line for Institutional Profiles -
    Given the timing of your work plan, I have generated a more
detailed (suggestive) time line for the Institutional Profiles.
As you will notice, the timing will be very tight (for us and the
communities). In order to complete the reports by December 1st
(and to keep in mind community schedules), the survey will have
to be implemented in June and the data analyzed in August. (I
discuss an alternative to this below.) There are of course
benefits to proceeding at this pace. In particular, it will
provide the communities with needed information on their
educational institutions within a reasonable time period.

|                          | A | M | J | J | A | S | O | N | D |
|--------------------------|---|---|---|---|---|---|---|---|---|
| **STAGE I**              |   |   |   |   |   |   |   |   |   |
| Select and notify interviewees | x |   |   |   |   |   |   |   |   |
| Conduct interviews       | xx |   |   |   |   |   |   |   |   |
| Analyze interviews & write concept memo |   | xxx |   |   |   |   |   |   |   |
| Approval of memo         |   | x |   |   |   |   |   |   |   |
| Develop and test instrument |   | xxxxx |   |   |   |   |   |   |   |
| Develop implementation process |   |   | xxx |   |   |   |   |   |   |

|                          | A | M | J | J | A | S | O | N | D |
|--------------------------|---|---|---|---|---|---|---|---|---|
| **STAGE II**             |   |   |   |   |   |   |   |   |   |
| Implement instrument     |   |   | xxxxxxxx |   |   |   |   |   |   |
| Input data               |   |   |   | xxxx |   |   |   |   |   |
| Compute & analyze data   |   |   |   |   | xxxxxxxxxxxx |   |   |   |   |
| Write reports            |   |   |   |   |   | xxxxxxxxxxx |   |   |   |

I expect that we will include community personnel in the analysis of the data and the writing of the reports. Thus, the time-line will have to be modified for each community since they will be receiving their data at different points in time. Hopefully, they will all receive their data within a few weeks of each other.

There is another option for Stage II.

|                          | A | M | J | J        | A    | S        | O      | N | D |
|--------------------------|---|---|---|----------|------|----------|--------|---|---|
| STAGE II                 |   |   |   |          |      |          |        |   |   |
| Implement instrument     |   |   |   | xxxxxxxx |      |          |        |   |   |
| Input data               |   |   |   |          | xxxx |          |        |   |   |
| Compute & analyze data   |   |   |   |          |      | xxxxxxxx |        |   |   |
| Write reports            |   |   |   |          |      |          | xxxxxx |   |   |

This alternative option has the benefit of allowing the instrument to be field tested and revised during June. In terms of time pressure, it alleviates pressure in June but provides less time for the communities and the MEF team to analyze the data and write the reports in the Fall. In addition, given the Jewish Holidays which occur in September, the communities will probably have very little time to devote to the project during that month.

A third option is to implement the instrument in one or two of the communities in June/July and then in the other community(ies) in July/August.

Finally, there are two other factors to consider. First, when will the educational directors of the various institutions be present in the communities and available to complete the survey? Second, when will communal personnel find it most useful to analyze the data and receive a report?

I don't know the schedules of Milwaukee or Baltimore, but based on a recent conversation I had with Bill Schatten I was able to delineate a VERY tentative time line for Atlanta. The following is what an Atlanta-MEF calendar (which also includes analysis of Educator's Survey data and development of PAP) may look like. It follows the first time line given above. Notably, providing them with Institutional Profiles (data and report) could fit nicely with their planning activities.

|                           | A | M                | J          | J          | A        | S    | O          | N | D |
|---------------------------|---|------------------|------------|------------|----------|------|------------|---|---|
| Educator's Survey -       |   |                  |            |            |          |      |            |   |   |
|   Analyze Data  |   | xxxxxxxxxxxxxx   |            |            |          |      |            |   |   |
|   Write Report  |   |                  | ?????xxxxx |            |          |      |            |   |   |
| Institutional Profiles -  |   |                  |            |            |          |      |            |   |   |
|   Implementation|   |                  | xxxxxxx    |            |          |      |            |   |   |
|   Analyze Data  |   |                  |            |            | xxxxxx   | ???? |            |   |   |
|   Write Report  |   |                  |            |            |          |      | xxxxxxxxxx |   |   |
| Begin serious PAP work -  |   |                  |            | ???????? | xxxxxxxxxxxxxx |      |            |   |   |

I hope these additional time lines prove helpful in deciding on the practicality and the costs/benefits of the (proposed) work plan and time line. It was very helpful to me in comprehending what has to be accomplished and when. I'd appreciate any comments

that you and the rest of the MEF team may have on my time lines.

                              Bill

```
GAMO$ type bill.cmt
From:    EUNICE::"74104.3335@CompuServe.COM"   1-APR-1994 12:19:20.65
To:      Adam Gamoran <gamoran>
CC:
Subj:    Suggested time line??
```

Adam,

Ignore the following if you want. I don't mean to swamp you with time
lines! I just thought that it may be useful for your thinking if I shared
them with you.


Based on the conference call, I composed TWO "more reasonable"(?) time
lines for the Institutional Profiles. HOWEVER, THE FIRST ONE IGNORES ALAN'S
REQUEST FOR A WORK PLAN WHICH ENDS (completes most projects?) BY DECEMBER
31ST.

Both provide increased time for:
   - conducting interviews and writing memo;
   - for development of the instrument;
   - for development of the procedures for implementation.

There are three key concerns:
   1. How much time can we make available to bring the communities into the
      process?
   2. How practical are the alternative implementation times? Is August
      possible? Or must we wait to October?
   3. How will the work plan look to Alan? Namely, is there a need for us to
      produce this by December 31st?
In particular, I have my own concern. If we go with the following time
line, by December 31st I will have produced nothing "substantial" (beyond
the updates, and the ongoing verbal information I give to Gail to
facilitate her job). What will be my value to CIJE?


THE FIRST (LONGER) TIME LINE -

```
                     A   M   J   J   A   S   O   N   D
       STAGE I
Select and notify
   interviewees       xx
Conduct interviews        xxx
Analyze interviews
   & write concept
   memo                       xxxx (due May 31st)
Approval of memo              xx
Develop and test
   instrument                     xxxxx??????xxx (due August 31st)
Develop implement-
   ation process                  xxxx??????xxx (due August 31st)
                 A   M   J   J   A   S   O   N   D   J   F
       STAGE II
Implement instrument                      xxxxxxxx
Input data                                   xxxx
Compute & analyze data                          xxxxxxxxxx
Write reports                           (due February 28th)   xxxxxxx
```

```
THE SECOND (COMPROMISE?) TIME LINE -

                        A    M    J    J    A    S    O    N    D
     STAGE I
Select and notify
  interviewees         xx
Conduct interviews        xxx
Analyze interviews
  & write concept
  memo                      xxx (due May 15th)
Approval of memo             xx
Develop and test
  instrument                   xxxxxxx (due July 15th)
Develop implement-
  ation process                xxxxxx (due July 15th)
                        A    M    J    J    A    S    O    N    D    J    F
     STAGE II
Implement instrument                      xxxxxx
Input data                                   xxxx
Compute & analyze data                         xxxxxxxxxx
Write reports                   (due December 31st)    xxxxxxxx


                              Good luck!

                              Bill
```

This fax consists of ___2___ pages. For problems with its transmis-
sion, please contact Roberta Goodman at 608-231-3534.

### Memorandum

May 12, 1994

To:        Adam Gamoran

From:      Roberta Goodman and Julie Tammivaara

Re:        Draft of the Letter for the Institutional Profiles

cc:        Ellen Goldring

We have some comments both about the letter and the interviewing
process. We list these comments in no particular order of impor-
tance.

1) The letter's tone is formal, distant, presumptuous, and stiff.
As we will be interviewing people who are in the communities and
well known to us, the tone is inappropriate. Many of the "out-
side" experts will also be known if not to Bill personally, to
the CIJE. Some may be CIJE Board members or former Commission
members.

2) The letter suggests that the person call Bill to state date
and time preferences or to say that they are not interested in
participating. This puts the burden on someone who is graciously
sharing his/her time. A preferable statement would indicate that
Bill will be contacting the person in the next few weeks to
answer questions about the interview and to set up a time, if
s/he is available.

3) The letter is presented more as a request asking for their
permission to be interviewed than as a request asking for them to
participate. Nowhere in the letter does it explain why these
people's opinion are needed. We want to hear a range of perspec-
tives on what is important to know about Jewish educational
institutions to help an institution grow. We consider these
people critical to our discovering that. From there, we can
produce instruments. Devising the instruments is not the core
reason that we want their input.

In terms of permission, the letter should include a statement
that we are going to audio-tape these interviews and maintain the
confidentiality of those interviewed.

4) The revised set of questions as listed here are both too vague
and off target. The original questions that we devised are much

more specific to the institutions. It has been our experience
that more specific and concrete questions and not general and
abstract questions, yield richer data. Julie has written about
this based on the work of Dan Lortie. Also, we made suggestions
that certain people be interviewed because they are good thinkers
who work within particular Jewish educational institutions. These
questions remove the people from their context.

In looking at the revised questions themselves, our task is not
to explore what about Jewish education needs to be improved as
the first question suggests. We want to know what institutions
need to know in order to grow and change themselves. After all,
these questions are to supposed to help us develop institutional
profile instruments and not redo the Commission's work.

We developed the original set of questions in less than half an
hour. Since then the desired outcome of this process has been
better defined. We would be happy to further refine the original
four questions and suggest follow-up probes.

5) Who are these letters to be sent to? How many people are we
considering interviewing? These questions are critical to
answering both the stylistic and substantive concerns that we
raise.

6) As a final issue, we question whether a letter is needed as a
mode of introduction for all the people involved. Certainly in
our communities where we have established rapport with the people
likely to be interviewed, sending a letter in advance seems
almost unnecessary. Some people may need letters and others not.


We look forward to hearing your response.

Adam, Ellen, Roberta and Julie,


The following is a draft of the letter which would be sent
to selected interviewees, as part of our Institutional Profiles
project. In order to get going on this project, I'd like
comments, suggestions and corrections by May 17th. There are
several important things to note about the draft:

1. For those interviewees who reside in our local communities, I
suggest that a cover letter be included stating that we would
like to conduct the interview in person. Perhaps, this would be a
personal note from the respective field researcher.

2. The letter would be printed on CIJE stationary or an
appropriate heading would be included.

3. Since we will be interviewing two types of personnel - per the
final proposal: experts in Jewish education (including educators)
AND Jewish communal professionals - I suggest two versions of the
letter. The only difference would be the first sentence of the
second paragraph. The following draft reads:
    We request permission to interview you as an authority on
    Jewish education.
For the latter group (Jewish communal professionals), I suggest
the following:
    We request permission to interview you as an authority in
    Jewish community service.

4. The following draft letter contains a change in the questions
that the field researchers developed in February. The original
questions were as follows:

  1. If you wanted to learn about an educational institution,
     what are the things that you would need to know to get a
     picture of that institution?

  2. What distinguishes an effective educational institution?

3. From your perspective, what needs to be improved about Jewish education?

4. What would you need to know to improve a specific educational institution? *your? a particular?*

The main differences between the two sets are a change in the order and the replacement of question #1 (this set) by question #2 (revised set in draft letter). The revisions were done to assure that interviewees explore the role that educational institutions may play in changes which are NOT confined to a single educational institution (i.e., professionalization of Jewish education). I believe the original set would prematurely circumscribe the interviewees's field of vision by first focusing on issues pertinent to a single institution. Notably, questions #3 and #4 (in the revised set) still ask the interviewee to focus on an individual institutions. Yet, the interviewee now begins by addressing the wider issue of Jewish education. This revised protocol will (hopefully) generate a rationale for why we should focus (also) on individual institutions in order to fulfill the more communal and systemic goals of CIJE.

I'm off on vacation to the Smokey Mountains. I'll be back on Saturday.

Bill

The draft letter follows:

date

Dear        ,

The Council for Initiatives in Jewish Education, as part of its Monitoring, Evaluation and Feedback project, is planning to undertake research on the nature and quality of Jewish educational institutions. In order to develop effective and valid instrumentation, we are interviewing selected personnel in North America and Israel to elicit their expertise on this topic.

We request permission to interview you as an authority on Jewish education. During the next few weeks, from May ?? to May ??, we will be calling the selected individuals to conduct

telephone interviews. If there is a particular day and time which is more convenient for you during this period, or if you do not desire to be interviewed, could you please call Bill Robinson at (404) 552-0930. Otherwise, we will try to reach you by phone sometime during this period.

The interview should take approximately 20 minutes. Below are the four questions which will guide the interview. Please familiarize yourself with them and consider your answers prior to the interview.

1. From your perspective, what needs to be improved about Jewish education?

2. To accomplish these improvements, what changes need to occur among educational institutions?

3. What distinguishes an effective educational institution?

4. What would you need to know to improve a specific educational institution?

We thank you in advance for your cooperation.

Sincerely,

Roberta Goodman

Bill Robinson

Julie Tammivaara

fr conf. call.   5/4/94

What would be useful to communities?
How make communities eval-minded?


hooking into actions that communities want done
   - eg MM
   - teens in Milwaukee


get employed by funders - eg Baden
                                          Lee Hendler


pop trends - Joe Braver in Baltimore,
                  but no one in M or A


evaluat of small projects

making prof lives accessible to a wider audience
   - at least a copy to those who were interviewed
   - write a "lesson plan" (guidelines) to use at t mtg,
        s-ul committee mtg, etc
   - highlights to all t's
   - dissem in newspaper, &/or flyer,
           w/ highlights & place to get more info

talk w/ Federal about evaluat of progs (already tied to
                                                              funding, but

the funding of Jewish education - needs study

need a few good expers in small things

evaluat of teachers in s.hls

---

communities need to be signalled that
FR's are avail to help
— fr's can do informally for time being

FIELD(Hon) FIELD(First Name) FIELD(Last Name)
IFNOTBLANK(company)FIELD(Company)
ENDIF FIELD(Address)
FIELD(City), FIELD(State) FIELD(Zip Code)

June 8, 1994

Dear FIELD(Hon) FIELD(Last Name),

The Council for Initiatives in Jewish Education, as part of its Monitoring, Evaluation and Feedback project, is planning to undertake a study of Jewish educational institutions. We are interested in developing a process through which institutions can take stock of their abilities, prioritize their goals and monitor their progress.

To accomplish this, we would like to learn from the experiences of those with expertise in Jewish education, from a wide variety of settings. We would like to consult with you about those issues that need to be addressed to facilitate and assess the growth of Jewish educational institutions. During the next week, Bill Robinson will be contacting you to discuss this project and to ask you to participate.

We would like to conduct a consultation with you over the phone and tape the conversation for CIJE's own records. The tape and transcription will remain confidential. The consultation should take approximately 30 minutes. As a guide for the conversation, we offer two questions for you to consider.

1.     What are characteristics of an effective Jewish educational institution?

2.     If you wanted to improve FIELD(Setting Insert), what would you need to know and how would you know if you succeeded?

We thank you in advance for your consideration and participation.

Sincerely,

Bill Robinson
Field Researcher, CIJE

Local address and telephone number:

1525 Wood Creek Trail
Roswell, Georgia 30076
(404) 552-0930

# Interview Protocol for Institutional Profiles
## (Long Version)*

## I. Purpose:

As mentioned in the Institutional Profiles proposal, there exists an enormous number of potential aspects of a Jewish educational institution that could be investigated with the Institutional Profiles. The purpose of this interview process is two-fold:
1. to delimit the field of potential aspects; and
2. to provide direction in the formation of indicators and the rationale for their selection.

## I. Two General Guidelines:

The interviewees will consist of people whose expertise is within a single type of institution (e.g., day school, supplementary school, adult education) and those whose expertise covers a variety of institutional settings. We should gear our questions accordingly. For the former group, we should tend to phrase questions in accordance with their particular area of expertise. For instance, what are the characteristics of an effective Jewish day school? For the latter group, we should try to elicit information on the differences between and commonalities among types. For instance, are the characteristics you are describing specific to a day school, or would they be found in a congregational school?

Throughout the interview, we should try to get the interviewees to be as specific and as concrete as possible. In reference to any specific characteristics (which they raise or we introduce), we should ask the following probes:

a. In what way is this characteristic important?

b. When you talk about ___(fill in)___, what do you mean?

c. What particular aspects of this general characteristic are most important?

And, we should always lead the conversation toward possible indicators,

d. How would you determine if this characteristic is present in an institution?

## II. The Two Main Questions and Follow-up Probes:

In the letter, we are proffering two questions for the participants to consider prior to the interview. They are as follows, with suggested follow-up probes. [Of course, one should adjust the phrasing to match one's personal style and the tone of the conversation.]

1. What are characteristics of an effective Jewish educational institution?

   Follow-up probes:
   a. How would you determine if those characteristics are present in a particular institution?

   b. Given limited resources, which characteristics would be most important to know?

   c. Which of these characteristics are particular to a certain type of educational institution? Which are common to all types?

   d. What characteristics are unique to an effective Jewish educational institution, as opposed to a secular one?

2. If you wanted to improve a particular Jewish educational institution, what would you need to know and how would you know if you succeeded?

   Follow-up probes:
   a. How would you go about finding the information you needed to know?

   b. If you were going to begin this process what would you do first?

   c. Given limited resources, which characteristics of an educational institution would be the most important indicators of success?

   d. - Are certain types of information more important to know depending on whether the institution is a day school, a supplementary school or a pre-school?
   - What about a more informal setting, such as adult education or a camp?
   - How would its denominational affiliation change what you need to know?

## III. Additional Questions and Follow-up Probes:

We should also follow-up the above questions with probes designed to elicit the interviewees' opinions on a series of specific characteristics (as listed in Box #4 of the Planning Guide and in Adam's memo of February 15th.) <u>Not all characteristics need to be discussed in every interview</u>. Moreover, we should try to insert these questions into the flow of the conversation (and NOT allow it to descend into yes/no responses to a series of possible indicators). <u>Nevertheless, we should make certain that characteristics in each of the five areas (as delineated below) are covered over the course of our interviews.</u>

We may want to introduce an item into the interview after the interviewee has suggested a related item, by saying (depending on which main question is under discussion):

a. A related characteristic is __(fill in)__. How important is this to being an effective institution?

   OR

b. A related characteristic is __(fill in)__. How important is it to know about this in order to improve a particular school?

Or, near the end of the interview it may be useful to elicit the interviewee's opinion on those characteristics that s/he did not suggest. In this case, we may want to ask the following question.

c. Others have suggested additional characteristics that may be important like __(fill in)__. Which of these do you think are important?

The specific characteristics (which are still very general), for which we should try to elicit the interviewees' opinions, are:

A. Organization:
   1. vision (i.e., whose vision? extent shared? relation to everyday practice?)
      [This is an important item. Probe for what in particular is important about vision and how one would determine if a school has these qualities.]
   2. *institutional* climate (i.e., do students and faculty feel that they are part of a community)
   3. educational leadership (i.e., the skills and practices of the educational director)

4. relations between the school and the larger organization (e.g., congregational school and congregation, pre-school and JCC) - if applicable
5. external relations with other schools, informal educational programs and communal agencies

B. Students/Parents:
1. student satisfaction
2. student enrollments and/or graduation rates
3. student involvement in school decisions
4. parental satisfaction
5. parental involvement in school decisions

C. Educators:
1. educator satisfaction
2. educator involvement in school decisions
3. stability of teaching staff
4. the quality of the educational staff (in particular: classroom abilities, educational background, training)
5. the processes by which educators are evaluated
6. opportunities for and quality of in-service training
7. opportunities for cooperation among educators

D. Program Components:
1. breadth and depth of the curriculum
2. physical resources (i.e., library, multimedia services, etc.)

E. Financial:
1. financial stability
2. fiduciary responsibility in decision-making

<u>Interview Protocol for Institutional Profiles</u>
(Short Version for General Interviews)

The following probes are suggestive. Please feel free to use only those which are appropriate to the conversation. Two reminders:
- get the interviewee to be as SPECIFIC as possible about the nature of the characteristics, and
- lead the conversation toward CONCRETE INDICATORS (i.e., "How would you determine if this characteristic is present in an institution?")

1. What are characteristics of an effective Jewish educational institution?

   Follow-up probes:
   a. How would you determine if those characteristics are present in a particular institution?

   b. Given limited resources, which characteristics would be most important to know?

   c. Which of these characteristics are particular to a certain type of educational institution? Which are common to all types?

   d. What characteristics are unique to an effective Jewish educational institution, as opposed to a secular one?

2. If you wanted to improve a particular Jewish educational institution, what would you need to know and how would you know if you succeeded?

   Follow-up probes:
   a. How would you go about finding the information you needed to know?

   b. If you were going to begin this process what would you do first?

   c. Given limited resources, which characteristics of an educational institution would be the most important indicators of success?

   d. - Are certain types of information more important to know depending on whether the institution is a day school, a supplementary school or a pre-school?
   - What about a more informal setting, such as adult education or a camp?
   - How would its denominational affiliation change what you need to know?

The following are a tentative list of important characteristics.
Please query each interviewee about SOME of these by asking one
of the following three questions.

   a. A related characteristic is __(fill in)__. How important is
      this to being an effective institution?

   b. A related characteristic is __(fill in)__. How important is
      it to know about this in order to improve a particular
      institution?

   c. Others have suggested additional characteristics that may be
      important like __(fill in)__. Which of these do you think
      are important?

The List:

   A. Organization:
      1. vision (i.e., whose vision? extent shared? relation to
         everyday practice?)
      2. institutional climate (i.e., do students and faculty
         feel that they are part of a community)
      3. educational leadership (i.e., the skills and practices
         of the educational director)
      4. relations between the school and the larger
         organization (e.g., congregational school and
         congregation, pre-school and JCC) - if applicable
      5. external relations with other schools, informal
         educational programs and communal agencies

   B. Students/Parents:
      1. student satisfaction
      2. student enrollments and/or graduation rates
      3. student involvement in school decisions
      4. parental satisfaction
      5. parental involvement in school decisions

   C. Educators:
      1. educator satisfaction
      2. educator involvement in school decisions
      3. stability of teaching staff
      4. the quality of the educational staff (in particular:
         classroom abilities, educational background, training)
      5. the processes by which educators are evaluated
      6. opportunities for and quality of in-service training
      7. opportunities for cooperation among educators

   D. Program Components:
      1. breadth and depth of the curriculum
      2. physical resources (i.e., library, multimedia, etc.)

   E. Financial:
      1. financial stability
      2. fiduciary responsibility in decision-making

<u>Interview Protocol for Institutional Profiles</u>
(Short Version for Formal Institutional Settings)

The following probes are suggestive. Please feel free to use only those which are appropriate to the conversation. Two reminders:
- get the interviewee to be as SPECIFIC as possible about the nature of the characteristics, and
- lead the conversation toward CONCRETE INDICATORS (i.e., "How would you determine if this characteristic is present in an institution?")

1. What are characteristics of an effective Jewish educational institution?

   Follow-up probes:
   a. How would you determine if those characteristics are present in a particular institution?

   b. Given limited resources, which characteristics would be most important to know?

   c. Which of these characteristics are particular to a Jewish day/supplementary/pre-school? Which are common to all types of educational institutions?

   d. What characteristics are unique to an effective Jewish day/supplementary/pre-school, as opposed to a secular educational institution?

2. If you wanted to improve a particular Jewish day/supplementary/pre-school, what would you need to know and how would you know if you succeeded?

   Follow-up probes:
   a. How would you go about finding the information you needed to know?

   b. If you were going to begin this process what would you do first?

   c. Given limited resources, which characteristics of a Jewish day/supplementary/pre-school would be the most important indicators of success?

   d. - Are certain types of information more important to know depending on whether the institution is a day school, a supplementary school or a pre-school?
      - What about a more informal setting, such as adult education or a camp?
      - How would its denominational affiliation change what you need to know?

The following are a tentative list of important characteristics. Please query each interviewee about SOME of these by asking one of the following three questions.

a. A related characteristic is ___(fill in)___. How important is this to being an effective institution?

b. A related characteristic is ___(fill in)___. How important is it to know about this in order to improve a particular day school?

c. Others have suggested additional characteristics that may be important like ___(fill in)___. Which of these do you think are important?

The List:

A. Organization:
   1. vision (i.e., whose vision? extent shared? relation to everyday practice?)
   2. institutional climate (i.e., do students and faculty feel that they are part of a community)
   3. educational leadership (i.e., the skills and practices of the educational director)
   4. relations between the school and the larger organization (e.g., congregational school and congregation, pre-school and JCC) - if applicable
   5. external relations with other schools, informal educational programs and communal agencies

B. Students/Parents:
   1. student satisfaction
   2. student enrollments and/or graduation rates
   3. student involvement in school decisions
   4. parental satisfaction
   5. parental involvement in school decisions

C. Educators:
   1. educator satisfaction
   2. educator involvement in school decisions
   3. stability of teaching staff
   4. the quality of the educational staff (in particular: classroom abilities, educational background, training)
   5. the processes by which educators are evaluated
   6. opportunities for and quality of in-service training
   7. opportunities for cooperation among educators

D. Program Components:
   1. breadth and depth of the curriculum
   2. physical resources (i.e., library, multimedia, etc.)

E. Financial:
   1. financial stability
   2. fiduciary responsibility in decision-making

Interview Protocol for Institutional Profiles
(Short Version for Camps or Adult Educational Programs)

The following probes are suggestive. Please feel free to use only those which are appropriate to the conversation. Two reminders:
- get the interviewee to be as SPECIFIC as possible about the nature of the characteristics, and
- lead the conversation toward CONCRETE INDICATORS (i.e., "How would you determine if this characteristic is present in an institution?")

1. What are characteristics of an effective Jewish educational institution?

   Follow-up probes:
   a. How would you determine if those characteristics are present in a particular institution?

   b. Given limited resources, which characteristics would be most important to know?

   c. Which of these characteristics are particular to a Jewish camp/adult educational program? Which are common to all types of educational institutions?

   d. What characteristics are unique to an effective Jewish camp/adult educational program, as opposed to a secular one?

2. If you wanted to improve a particular Jewish camp/adult educational program, what would you need to know and how would you know if you succeeded?

   Follow-up probes:
   a. How would you go about finding the information you needed to know?

   b. If you were going to begin this process what would you do first?

   c. Given limited resources, which characteristics of a Jewish camp/adult educational program would be the most important indicators of success?

   d. - Are certain types of information more important to know depending on how formal the setting is?
        [i.e., formal versus informal settings]
      - How would its denominational affiliation change what you need to know?

The following are a tentative list of important characteristics.
Please query each interviewee about SOME of these by asking one
of the following three questions.

    a. A related characteristic is __(fill in)__. How important is
       this to being an effective institution?

    b. A related characteristic is __(fill in)__. How important is
       it to know about this in order to improve a particular day
       school?

    c. Others have suggested additional characteristics that may be
       important like __(fill in)__. Which of these do you think
       are important?

The List:

  A. Organization:
     1. vision (i.e., whose vision? extent shared? relation to
       everyday practice?)
     2. institutional climate (i.e., do students and faculty
       feel that they are part of a community)
     3. educational leadership (i.e., the skills and practices
       of the educational director)
     4. relations between the school and the larger
       organization (e.g., congregational school and
       congregation, pre-school and JCC) - if applicable
     5. external relations with other schools, informal
       educational programs and communal agencies

  B. Students/Parents:
     1. student satisfaction
     2. student enrollments and/or graduation rates
     3. student involvement in school decisions
     4. parental satisfaction
     5. parental involvement in school decisions

  C. Educators:
     1. educator satisfaction
     2. educator involvement in school decisions
     3. stability of teaching staff
     4. the quality of the educational staff (in particular:
       classroom abilities, educational background, training)
     5. the processes by which educators are evaluated
     6. opportunities for and quality of in-service training
     7. opportunities for cooperation among educators

  D. Program Components:
     1. breadth and depth of the curriculum
     2. physical resources (i.e., library, multimedia, etc.)

  E. Financial:
     1. financial stability
     2. fiduciary responsibility in decision-making

<u>Interview Protocol for Institutional Profiles</u>
(Short Version for Israeli Programs and JCC's Educational
Programming)

The following probes are suggestive. Please feel free to use only
those which are appropriate to the conversation. Two reminders:
- get the interviewee to be as SPECIFIC as possible about the
  nature of the characteristics, and
- lead the conversation toward CONCRETE INDICATORS (i.e., "How
  would you determine if this characteristic is present in an
  institution?")


1. What are characteristics of an effective Jewish educational
   institution?

   Follow-up probes:
   a. How would you determine if those characteristics are
      present in a particular institution?

   b. Given limited resources, which characteristics would be
      most important to know?

   c. Which of these characteristics are particular to a(n)
      Israeli program/JCC's educational programming? Which
      are common to all types of educational institutions?

   d. What characteristics are unique to an effective Israeli
      program/JCC's educational programming, as opposed to a
      secular one?

2. If you wanted to improve a particular Israeli program/Jewish
   Community Center's educational programming, what would you
   need to know and how would you know if you succeeded?

   Follow-up probes:
   a. How would you go about finding the information you
      needed to know?

   b. If you were going to begin this process what would you
      do first?

   c. Given limited resources, which characteristics of a(n)
      Israeli program/JCC's educational programming would be
      the most important indicators of success?

   d. - Are certain types of information more important to
      know depending on how formal the setting is?
           [i.e., formal versus informal settings]
      - How would its denominational affiliation change what
      you need to know?

The following are a tentative list of important characteristics.
Please query each interviewee about SOME of these by asking one
of the following three questions.

   a. A related characteristic is __(fill in)__. How important is
      this to being an effective institution?

   b. A related characteristic is __(fill in)__. How important is
      it to know about this in order to improve a particular day
      school?

   c. Others have suggested additional characteristics that may be
      important like __(fill in)__. Which of these do you think
      are important?

The List:

   A. Organization:
      1. vision (i.e., whose vision? extent shared? relation to
         everyday practice?)
      2. institutional climate (i.e., do students and faculty
         feel that they are part of a community)
      3. educational leadership (i.e., the skills and practices
         of the educational director)
      4. relations between the school and the larger
         organization (e.g., congregational school and
         congregation, pre-school and JCC) - if applicable
      5. external relations with other schools, informal
         educational programs and communal agencies

   B. Students/Parents:
      1. student satisfaction
      2. student enrollments and/or graduation rates
      3. student involvement in school decisions
      4. parental satisfaction
      5. parental involvement in school decisions

   C. Educators:
      1. educator satisfaction
      2. educator involvement in school decisions
      3. stability of teaching staff
      4. the quality of the educational staff (in particular:
         classroom abilities, educational background, training)
      5. the processes by which educators are evaluated
      6. opportunities for and quality of in-service training
      7. opportunities for cooperation among educators

   D. Program Components:
      1. breadth and depth of the curriculum
      2. physical resources (i.e., library, multimedia, etc.)

   E. Financial:
      1. financial stability
      2. fiduciary responsibility in decision-making

<u>Interview Protocol for Institutional Profiles</u>
(Short Version for Youth Programs)

The following probes are suggestive. Please feel free to use only those which are appropriate to the conversation. Two reminders:
- get the interviewee to be as SPECIFIC as possible about the nature of the characteristics, and
- lead the conversation toward CONCRETE INDICATORS (i.e., "How would you determine if this characteristic is present in an institution?")

1. What are characteristics of an effective Jewish educational institution?

   Follow-up probes:
   a. How would you determine if those characteristics are present in a particular institution?

   b. Given limited resources, which characteristics would be most important to know?

   c. Which of these characteristics are particular to a Jewish youth program? Which are common to all types of educational institutions?

   d. What characteristics are unique to an effective Jewish youth program, as opposed to a secular one?

2. If you wanted to improve a particular Jewish youth program, what would you need to know and how would you know if you succeeded?

   Follow-up probes:
   a. How would you go about finding the information you needed to know?

   b. If you were going to begin this process what would you do first?

   c. Given limited resources, which characteristics of a Jewish youth program would be the most important indicators of success?

   d. - Are certain types of information more important to know depending on how formal the setting is?
          [i.e., formal versus informal settings]
      - How would its denominational affiliation change what you need to know?

The following are a tentative list of important characteristics.
Please query each interviewee about SOME of these by asking one
of the following three questions.

    a. A related characteristic is ___(fill in)___. How important is
       this to being an effective institution?

    b. A related characteristic is ___(fill in)___. How important is
       it to know about this in order to improve a particular day
       school?

    c. Others have suggested additional characteristics that may be
       important like ___(fill in)___. Which of these do you think
       are important?

The List:

  A. Organization:
     1. vision (i.e., whose vision? extent shared? relation to
       everyday practice?)
     2. institutional climate (i.e., do students and faculty
       feel that they are part of a community)
     3. educational leadership (i.e., the skills and practices
       of the educational director)
     4. relations between the school and the larger
       organization (e.g., congregational school and
       congregation, pre-school and JCC) - if applicable
     5. external relations with other schools, informal
       educational programs and communal agencies

  B. Students/Parents:
     1. student satisfaction
     2. student enrollments and/or graduation rates
     3. student involvement in school decisions
     4. parental satisfaction
     5. parental involvement in school decisions

  C. Educators:
     1. educator satisfaction
     2. educator involvement in school decisions
     3. stability of teaching staff
     4. the quality of the educational staff (in particular:
       classroom abilities, educational background, training)
     5. the processes by which educators are evaluated
     6. opportunities for and quality of in-service training
     7. opportunities for cooperation among educators

  D. Program Components:
     1. breadth and depth of the curriculum
     2. physical resources (i.e., library, multimedia, etc.)

  E. Financial:
     1. financial stability
     2. fiduciary responsibility in decision-making

<u>Interview Protocol for Institutional Profiles</u>
(Short Version for Community Planning Interviews)

The following probes are suggestive. Please feel free to use only those which are appropriate to the conversation. Two reminders:
- get the interviewee to be as SPECIFIC as possible about the nature of the characteristics, and
- lead the conversation toward CONCRETE INDICATORS (i.e., "How would you determine if this characteristic is present in an institution?")


1. What are characteristics of an effective Jewish educational institution?

   Follow-up probes:
   a. How would you determine if those characteristics are present in a particular institution?

   b. Given limited resources, which characteristics would be most important to know?

   c. Which of these characteristics are particular to a certain type of educational institution? Which are common to all types?

   d. What characteristics are unique to an effective Jewish educational institution, as opposed to a secular one?

2. If you wanted to improve Jewish educational institutions within a community, what would you need to know and how would you know if you succeeded?

   Follow-up probes:
   a. How would you go about finding the information you needed to know?

   b. If you were going to begin this process what would you do first?

   c. Given limited resources, which characteristics of these educational institutions would be the most important indicators of success?

   d. - Are certain types of information more important to know depending on whether the institutions are day schools, supplementary schools or pre-schools?
      - What about a more informal setting, such as adult education or a camp?
      - How would its denominational affiliation change what you need to know?

The following are a tentative list of important characteristics.
Please query each interviewee about SOME of these by asking one
of the following three questions.

  a. A related characteristic is ___(fill in)___. How important is
     this to being an effective institution?

  b. A related characteristic is ___(fill in)___. How important is
     it to know about this in order to improve a particular
     institution?

  c. Others have suggested additional characteristics that may be
     important like ___(fill in)___. Which of these do you think
     are important?

The List:

  A. Organization:
       1. vision (i.e., whose vision? extent shared? relation to
          everyday practice?)
       2. institutional climate (i.e., do students and faculty
          feel that they are part of a community)
       3. educational leadership (i.e., the skills and practices
          of the educational director)
       4. relations between the school and the larger
          organization (e.g., congregational school and
          congregation, pre-school and JCC) - if applicable
       5. external relations with other schools, informal
          educational programs and communal agencies

  B. Students/Parents:
       1. student satisfaction
       2. student enrollments and/or graduation rates
       3. student involvement in school decisions
       4. parental satisfaction
       5. parental involvement in school decisions

  C. Educators:
       1. educator satisfaction
       2. educator involvement in school decisions
       3. stability of teaching staff
       4. the quality of the educational staff (in particular:
          classroom abilities, educational background, training)
       5. the processes by which educators are evaluated
       6. opportunities for and quality of in-service training
       7. opportunities for cooperation among educators

  D. Program Components:
       1. breadth and depth of the curriculum
       2. physical resources (i.e., library, multimedia, etc.)

  E. Financial:
       1. financial stability
       2. fiduciary responsibility in decision-making

To:  Dan Pekarsky and Adam Gamoran
From:       Bill Robinson
Re:  Madison Meeting of June 13th

The following is a summary of our meeting in Madison held to
discuss the nature of a possible linkage between the MEF's
planned Institutional Profiles and the Goals Project. The summary
is divided into three parts. It is based upon notes I wrote
during and after the meeting and thus does not claim to represent
a verbatim recording of participants comments.

*****

Moreover, I may have provided more coherency to our
conversations than existed in actuality. I'm sending this only to
Adam and Dan first, so you may have the opportunity to point out
any errors I have made in description or omission. Please get
back to me ASAP, so I can distribute it to the rest of the MEF
staff. A separate (even briefer) summary will be prepared for
Alan, excluding the second section on possible indicators.

*****


A.   Becoming a Vision-Driven Institution and the Place of
Institutional Profiles

In the beginning of out conversation, Dan shared a few
models of how an institution could become vision-driven:
     1.     someone in authority holds a vision of what the
institution should become and leads the staff, parents and
learners toward that vision;
     2.     the individual visions of all stakeholders are
discussed and integrated to create a shared vision for the
institution;
     3.     for a new school, a vision is formed by a core founding
group, and (then) only those educators and students who share
that vision are brought into the institution.

In discussion, it was pointed out that an institution may
combine elements from each of these models. Ultimately, there
could be any number of possible paths by which an institution
becomes vision-driven. Thus, at this point, the Goals Project
does not contain guidelines for how an institution should become
vision-driven.

Following the Goals Seminar in Israel, local mini-seminars
are planned throughout the country. During these mini-seminars,
participants will discuss, from their institutional perspectives,
what it would mean to become vision-driven and how one

We then asked Dan, why?

1.      On parents and teachers beliefs in relation to
institutional beliefs (i.e., as espoused in their mission
statement) - the importance lies in having them discover the gaps
that exist between what the institution espouses and what
parents/educators believe they are doing.

2.      On kids enjoyment - the importance lies in assessing
the possibilities of translating vision into educational design
(i.e., what could work).

3.      On the parents' educational background and family life
- the importance lies in knowing whether you have the necessary
environmental supports to realize your vision.

In sum, Dan presented two general purposes for gathering the
above information:

1.      to make institutions more conscious of their own
reality (as a catalyst to get rid of mythologies about who they
are);

2.      to gather data important in any effort at reform.

C.   Conclusions and Issues to Address

Two conclusions were reached:

1.      there will be a linkage between the MEF's Institutional
Profiles and the Goals Project;

2.      the issue of whether this integrated project will occur
only on an institutional level or also on a communal level
remains undecided.

In respect to the latter, Dan requested that I write up a short
thought-piece on how the envisioned project could be played out
on a communal level.

We briefly discussed the issue of incentives (i.e., what
normative and practical incentives exist to encourage
participation in the project). While some currently exist -

a.      a national climate that increasingly demands that
schools become more successful,

b.      a dependency of many institutions on central funding
- it was thought that these may not be sufficient.

We also briefly discussed the issue of human-power in
relation to "taking stock" - that is, who will guide the
institutions in this process (as well as in the visioning
processes). Some possibilities were mentioned briefly (i.e.,
training one person in each institution to carry it out, training
a cadre of outside people to support the institution in this
endeavor, or having CIJE personnel act as advisors). It was
acknowledged that further consideration of this issue is
required.

could begin this process. The purpose of these mini-seminars is two-fold:

    1.    to learn about how different types of institutions may become vision-driven; and

    2.    to encourage participation in a process designed to facilitate the creation of vision-driven institutions.

It was suggested that the MEF's Institutional Profiles as a process of "taking stock" may be the first step that institutions would take toward becoming vision-driven. If so, a discussion of how institutions could "take stock" would become an integral par t of these mini-seminars. Then, those institutions which desired to participate would begin the process of "taking stock", which would lead them toward becoming vision-driven.

It was pointed out that this incipient model parallels CIJE's model of Research to Analysis to Planning. Yet, the research part ("taking stock") would be introduced within the larger context of becoming vision-driven.


B.    Taking Stock - Possible Indicators and Their Purpose

We asked Dan: if he was going to create a vision-driven institution, what types of information would he need to know to begin this process.

    Dan's suggestions:
Kids (learners):
    1.    how many kids
    2.    at what ages
    3.    their levels of proficiency along the relevant dimensions of that institution
    4.    kids attitudes toward the institution and toward the process of education they're engaged in
    5.    # of hours a week they participate
Parents:
    6.    type of education parents are involved in
    7.    other ways parents are tied to the Jewish community
    8.    how Judaism expresses itself in their family life
    9.    level of parents J. education
Teachers:
    10.    their education (and other stuff as on the Educators Survey)
    11.    coherency of teachers' beliefs and institutional beliefs (parents, too)
    12.    what they find rewarding and what frustrations they have in their work (ask this of kids, too)
    13.    what they would like to see more or less of (ask this of kids, too)
General:
    14.    What are the goals that an institution identifies as its own? Make a list of activities associated w/these goals. (Put each activity underneath the goal that it supports.)

July 22, 1994

MEF staff,

Please find enclosed two summaries of the Institutional Profiles consultations. The first is a quantitative summary of participants' responses. The second summary is a categorized selection of participants' views.

After reading through all the interviews, I tried to develop general categories into which I could place the consultants' views. I came up with 11 categories. This was not so simple, since the consultants tended to discuss items (i.e., educators, parents) in relation to other items (i.e., curriculum, vision). This important point is illustrated and discussed in the summary.

The categories (with suggested sub-categories) are as follows:

1. Vision
    the nature of the institution's vision (i.e., vision as outcome)
    who shares the vision

2. Learning Organization
    the nature of learning in the institution
    who is involved in institutional learning
    on measuring institutional outcomes (evaluation)

3. Institutional Climate (or the creation of learning "spaces")
    developing a safe space for learning
    developing a space for Jewish learning

4. Curriculum
    in relation to vision (institutional goals)
    internal coherency across grades

5. Finances and Physical Resources
    finances in relation to vision (institutional goals)
    physical resources in relation to vision (institutional goals)

6. Parents
    involvement of parents in the vision
    parent's Jewish practices in relation to vision (institutional goals) and the curriculum

7. Educators
    the quality (skills, training) of the staff in relation to vision (institutional goals)
    as role models
    the learning of educators as part of institutional learning

8. Learners
    as the "outcome" central to the institutional vision
    numbers and hours of contact

9. Leadership (may not be a separate category)

10. The Parent Organization (i.e., the congregation for a supplementary school)
     the importance and role of learning in the parent organization
     the role of the Rabbi (if applicable)

11. Community
     resources and services already available in the community
     the gap between programs and needs in the community
  and the community's vision.


For the quantitative summary, I maintained the categorization I used in the interview protocols (found on the last page of the protocols). What I found of interest was those areas that most consultants did not raise as important (i.e., student, parent or educator satisfaction, cooperation among educators). On the other hand, the consultants focused on two categories which were not included in that initial categorization (i.e., outcomes, planning).


I hope these summaries will provide a fruitful basis for our discussion of how to construct the "Taking Stock" process and its instrumentation. I have found the consultations to be very helpful in refining how we should look at any particular area (i.e., educators, parents, institutional climate,...), as well as pointing out the need to look more seriously into other areas (i.e., Learning Organization). For those that wish, I can send the transcripts or a sample of them. I'm sending Roberta the Supplementary and JCC transcripts.

Good reading,
Bill
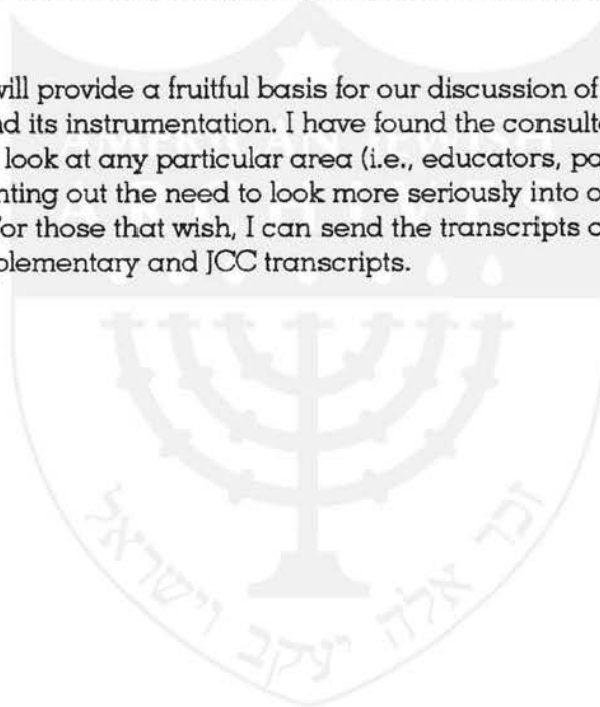
# INSTITUTIONAL PROFILES CONSULTATION PROCESS

## A Quantitative Summary of Participants Responses
(Sample size = 21)

| Areas: | Very Important | Important | Not Important (in isolation) |
|---|---|---|---|
| **A. Organizational:** | | | |
| 1. vision (includ. goals, objectives) | 11 | 5 | 2 |
| 2. institutional climate | 4 | 5 | |
| 3. educational leadership | 6 | 3 | 1 |
| 4. relations with the larger organization (includ. lay board) | 4 | 2 | |
| 5. external relations (w/other community programs) | 6 | 7 | |
| **B. Students/Parents:** | | | |
| 1. student satisfaction | 2 | 2 | 1 |
| 2. student enrollments and/or graduation rates (as well as duration) | 3 | 2 | |
| 3. student involvement | 3 | 3 | |
| 4. parental satisfaction | 0 | 0 | |
| 5. parental involvement (includ. roles, power, family Jewish life) | 6 | 4 | |
| **C. Educators:** | | | |
| 1. educator satisfaction (includ. respect for educators) | 0 | 4 | |
| 2. educator involvement (includ. their outlooks) | 3 | 1 | |

| Areas: | Very Important | Important | Not Important (in isolation) |
|---|---|---|---|
| 3. the quality of staff (includ. stability and being role models) | 5 | 8 | 1 |
| 4. in-service training (includ. evaluation) | 0 | 5 | |
| 5. cooperation among educators | 1 | 2 | |
| **D. Program Components:** | | | |
| 1. curriculum (i.e., quality, quantity, and its content) | 7 | 5 | |
| 2. physical resources | 2 | 5 | 1 |
| **E. Financial** | 2 | 9 | |

I had not listed the following two areas in the interview protocol (nor were they included in Box 4):

| | | | |
|---|---|---|---|
| F. Outcomes (changes in learner behaviors) | 9 | 4 | 1 |
| G. Planning (from goal setting and strategies to resource assessment and evaluation) | 7 | 2 | |

INSTITUTIONAL PROFILES CONSULTATION PROCESS

A Categorized Selection of Consultants' Views

CONFIDENTIAL
(Of Course)

# VISION

Vision was the most discussed item in the consultations. In talking about what constitutes an effective vision, many of the consultants focused on the "outcomes" of the learning process. What is the type of "graduate" that you want to produce? What will this person be like after leaving your educational institution?

> They have an image of the person they want to create. You can like it, you can hate it, but they have an image of the person they want to create and an image of what a Jewish community would look like that can support that person. They have an image of what we need to do in school in order to get you OK. Now, some of those images are written and articulated and explicit and some of them aren't. (cije)

> We asked what we were in business for. That's a generic. *One of the* questions in developing the mission that sort of helped us find the words for the mission were - what are your beliefs about school and schooling? What are your beliefs about learners and learning? Those are very broad. (day)

> And then a sub-question that we didn't ask, but I think today I would ask would be "what do you consider essential outcomes for graduates of your institution? We didn't ask that, but we are now asking ourselves that in trying to operationalize the mission. ... What you have to do I think is imagine this person and say what skills, attitudes and behaviors and then you sort of float off into the area of what kind of a spiritual person you hope they are or things that you will really never be able to measure or even look at until they are much older. (day)

> I think that one of the reasons at the end that the kids didn't continue to Hebrew High or etc. is because there wasn't an image that this is what you need to do at the end of the picture of where you had to go with it. (cije)

> What happens in the classroom has to be taught in a way that can also translate into their lives so that religious schooling isn't limited just to when they're in religious school but in some ways forms who they are eve when they leave the building....In terms of curriculum I think if they're only teaching facts, they're not doing it (cije)

> I think that one of the things that would generalize across institutions would be the adherence, the subsequent adherence of the participants in the lifestyle that is encouraged when they are not at camp.... if we say that kashrut is important, if we say that Israel is important, if we say that Jewish marriage is important, if we say that Jewish affinity is important, do these things happen to you in November? (camp)

Some particulars of an effective vision...

> I think success, at least by measuring rod, is whether we were getting our students into the growth mode. I don't think it makes a difference whether they are orthodox, reformed conservative secular, but if they are in the growth mode are they growing as

Jews might be. That is really the criterion I would use. Are they growing, if they are enrolled in more classes, are they continuing to enroll in more classes. If they are taking on an additional ritual in Jewish life. Are they sending the kids to Jewish educational experiences, if they themselves are becoming more consciously Jewish. I think that is certainly a success. Anything that is reflect above the growth mode.(adult)

I feel that a mark of success for the center with their families would be one that, because of their involvement with a Jewish pre-school, they would open up other options of opportunities to them in terms of continuing to further the child's Jewish education. They would seek out and explore opportunities in day schools and supplementary schools and Sunday School and wish to add to their own variety of Jewish participation within their home and family.(pre)

So one of our questions is, are we having an effect on that person. Are we inspiring them to become more affiliated in any, whether through the federation, through their local synagogue of any denomination, but are we inspiring them to take action on what they are learning? (jcc)

By and large American schools don't have that as the core part of their mission, but we are preparing kids for Jewish life, not just for giving them a Jewish content. So it matters to us, for example, that a kid come out of a Jewish school having a sense of the value of tzedakah. Or, a kid comes out a Jewish school, feeling good about prayer, wanting to participate in Jewish life, caring about Israel. Those are values that are well beyond the cognitive. (cije)

A thought and a concern about visions...

The only question in that regard that occurs to me that might have some differentiating characteristics or qualities is whether or not the purpose of the education is an end in itself or a means to recruitment. (camp).

They may not become what I would consider to be the school that I want to create but if they're going in that direction, if we're sort of on this path together, and actually the vision that I might have I might change based on the input that they have given me as I've understood them so we really have to create that. You have to create the path which I'm not sure is always the same as a vision. But you have to create the path together...In terms of vision, it can often tell you, you set out an ideal whereas with the path that's out in front of you. Whereas the path approaches, well you've taken one step so then you look at what the next couple of steps are. And that may open up but it may not be this great visionary piece. It may be just seeing where you are and going forward.(cije)

While many discussed the need for shared vision, there were some caveats....

They would be, for example, a strong sense of purpose or goal. A mission which is communicated throughout the system. That the people who are in the so-called lower

tiers of the system, have the same basic understanding of what the mission was as people at the top of the leadership.... that the goals are communicated well throughout the system and that the consumers, as it were, if you want to use that lingo, are also aware of that same thing. So sometimes you have in educational institutions, a large gap between what the institution thinks it is doing and what the consumers, that is the kids or the parents of those kids think is going on. So, I would say that an educational institution that is successful would have, perhaps no gap or a small gap. ... There is a kind of caveat on this one which is that there are educational institutions which are successful by being counter-cultural in terms of the norms of the people who send the kids to _____. For example, people have argued that, this is something that Joe Reamer wrote about, when he wrote about Rema in the 60's, and he argued that Rema essentially was a counter-cultural institution in the sense that it was teaching kids values that were in certain respects and maybe even in many respects counter to the values of the parents who are sending the kids to the camp. So they were teaching kids about shabbis and kashras and things like that and those parents may very well not have been so keen on that. ...It worked. So that's the caveat. There are cases where the consumer may not be aware of the goals of the institution and may have a different sense of those goals and yet the educational institution succeeds as a kind of counter-cultural educational institution. (cije)

There's always going to be a gulf where between where the leadership is and where the constituency is and I think the real challenge with working with congregations around this stuff is going to be how you can either engage the leadership of these institutions in trying to take their congregation through a process where a broader range of people within the institution buy into a certain vision or whether you can from the bottom up craft out of the life and culture of a congregation their internal sense of what they're supposed to be about. Most congregations operationally reflect a very conflicting set of messages you know i terms of religious practice and ideology that flow out of their history and how they got to where they got but if you try it now fresh to step in and craft a vision with them they would run into all sorts of internal consistencies with real complexity in how to get past that and not lose you know hundreds of congregational members. So I think that's you know that's at the heart of the challenge of what we're facing in this whole process....I think you would need to engage in a process either through assessment or through dialogue about whether there's a shared sense of problem. Are people happy with the Jewish educational product that they have or do they perceive that things could be better? Unless there's a perception that things could be better, it's difficult to engage people on some sort of change process. (central agency)

Now there is a real tension between a parent articulating his or her vision and professional, you know, what is the role of the professional in articulating Jewish vision of Jewish education. And, therein lies a tremendous challenge. Along with convincing educators and professionals that they need to articulate a vision, the second piece of that is when do the two meet? Where do we meet? (suppl)

If my goal was to engage the unaffiliated in Jewish learning and try to foster a passion there, that's a completely different ball game because those are people I am not sure that they even are cognizant of the need. I think a lot of synagogue people, if you speak

to them, you don't have to convince them that there is a need. They might not be prepared to do anything about it, but I think they would recognize there is a need for personal Jewish education and enrichment. But among some of the unaffiliated, at least, or a good part of it, it's not a vacuum they necessarily feel in their life. One of the first things one would have to do is figure out how to, not create that need, but make them cognizant of the need. Get them to buy into the fact that it is a need. That's a completely different step. (jcc)

parents and sharing vision -

I think that the way that you ask people to share in a vision, is the minute they step into a congregation and how they are met by a rabbi, how they are met by an educational director. What an intake process is like with a family as they come to affiliate. But, what is it that they are envisioning as they affiliate by membership? What is it that they want? Why are they joining this congregation? Why do they want to be part of this community? What are their goals, and desires in terms of Jewish education for their children? What kind of Jewish life are they striving towards? How is it that they seem themselves involved in this community? ...One of the greatest questions that I ask parents is, "what do you want your 18-year old to know, to think, to understand, to feel, to believe when he or she walks out of this place upon graduation?" And that is a very limited and narrow question when we talk about an educating congregation. ... So, when I ask a parent that, they almost never can give me what it is that they want for their child. (suppl)

I think what the first step might be is providing safe environments where we begin to push the parameters of those definitions and that may be beginning a conversation with a parent who says, "listen, my experience in religious school was schva, it was really shitty, therefore, my expectation is that my kid will be no better." And that may be the opening of a conversation where there are alternatives. There are alternatives to the education that you may have gotten. (suppl)

"Like". What do you like, what don't you like? Rather than what are the "oughts". What are the "shoulds"? What are the "musts" and why?...Tradition, or questions of authority and imperative, is there an imperative nature to what we understand to be the big questions in the world, morality, ethics, purpose, what is our purpose? When we begin to deal with those issues and struggle with those issues in a non-orthodox setting, it gets really messy. ....., I think that people are beginning to realize that those are the elements that need to be, that there is tremendous meaning in the tension of all of that, in the struggle. (suppl)

## A LEARNING ORGANIZATION

One of the most significant issues raised by the consultants was the issue of planning or becoming a learning organization. This would encompass (within a coherent whole) activites ranging from revisiting the vision to developing strategies for implementing the goals to

evaluation of programs in fulfilling the institutions envisioned goals.

On revisiting the vision...:

> So at some point, you know the mission or the vision of the institution changed. So I suppose part of an effective Jewish educational institution is establishing a mission and then revisiting it as community needs change.(jcc)

> The continual process of assessment that vision goes through. Not just are we doing what we want to be doing in each classroom. Are we achieving certain base levels of function that we are interested in achieving, let alone the effective realm of this, i.e. are our kids happy? Are we having a good time? Is there a sense of community and belonging and shared camaraderie here? Are we in this together? Is there the notion of celebrating other people's simclas and comforting them when their unhappy? Do we have that? There is also the notion of where are we in general? Not, did this program attract 400 people, it did, there were 400 people there, but continually ask the question, is that a meaningful program, was that a meaningful experience for those 400 people? And, if so, why? (suppl)

The idea of a "learning organization" -

> Where the institution is committed to, and this you would normally see through its leadership, in thinking about itself, evaluating how it is doing, talking about its successes and failures and being able and competent at adjusting for changes. Carol Ingle, writing about one of the schools in the Best Practice on supplementary schools said, "when this school ran up against a significant problem, unlike a lot of Jewish educational institutions, it didn't throw its hands up in the air and say, oh, there is nothing we can do." It said, "How can we fix this?" And that is, I think, a very important characteristic of a learning organization. (cije)

> What I am saying is that the ability to look and ask questions and say what is, what would I like to be, how could it be different. I think that the whole issue of constantly growing and learning is one of the things that differentiates those institutions that are really good from those who aren't. (cije)

On learning (planning) :

> if this is what we are about, then what are the challenges that face us? And, within five years, can we do any of that and, if we can't do any of that because they are only going to be 13 and they are never going to get that, so what are we going to do instead that is going to move them to their... (cije)

> I mean part of evaluating your effectiveness is learning where you are and then deciding where you want to go so if an institution does not engage in those two processes on a regular basis, they're not going to know. If you don't know where you're

going, you don't know if you've missed the boat. So I think the establishment of a mission statement is critical and I think the process of establishing it is much more important than what the mission statement actually ends up saying. I mean I think that whether it's strategic planning or creating a vision or long range goals. Something, criteria need to be established to measure what it is that you're doing. (jcc)

[from a congregational persepctive:] The congregation asks itself, is this synagogue service meaningful to the people who come here? Is it meeting their needs? Who does it meet and who does it miss? Who is involved in committees? Is that good or bad? What is the nature of the whole enterprise? Are we doing things that you would say are Jewish or are we not doing things that are Jewish? Do people learn new Jewish things from being involved in this congregation. So if it's a school, it's even more specific. (Rabbi)

What's the nature of the Bar Mitzvah in this school? Do we feel good about it or don't we? What can we do to impact the parents so that there is more commitment to these things? I'm not saying that we can actually have an impact on all of those people. (cije)

these are the questions that keep me up at night because the distinction, there is a chasm and I am sure that as you have talked to educational directors and to rabbinic professionals, the chasm that lies between thinking on this level, thinking in this kind of way, constantly being bombarded, or bombarding yourself, with these kinds of deliberations, versus, what my reality is, which is I have to open school for 900 students, 6 days a week and I have 85 faculty members who need to be paid, and we have curriculum that needs to be out and there is rosters that need to be given and there is life. You've got to open your doors. And you deal with parents who walk into your office and you walk up and down hallways and you do triage when you need to and you need to learn the names of your students...[Question: what could be done to raise it a little bit closer to the level of those issues that keep you up all night? Response:] Well, I think that one of the most primary things, and it is one that is usually neglected, because it is so dumb, it is just so stupid, is a place to begin to think through those things. The space and the time and the people and the resources to have those conversations regularly, as an integral part of what it means to work for a week..... I need 4 to 6 hours of think time a week to deal with these kinds of things, continually, ongoing. And that is at the least. (suppl)


Who learns (plans)? -

I mean I think institutions just in general tend to repeat even if they do evaluate. Part of it also is and this would probably, this would pertain really to any educational setting and that is that those powers that be that make decisions need to involve the professionals, the lay support people or the board people and representation of the client whether that's the students and family or the synagogue member or the center member and that those three groups are really partners in maintaining what happens and evaluating it and then making the changes and that the institution is also responsible for educating those three partners....I mean stakeholders should be involved in the process and development and maintenance of any institution. I definitely

think though that there is an added reason and a very Jewish reason to involve stakeholders in the process. I think it is definitively Jewish to create in partnership. Man was put on earth to finish God's work in perfecting and creating the world and I really do think that, I mean we could fight all kinds of things so I do think it is intrinsically Jewish to work in partnerships and in teams plus I think it's institutionally wise.(jcc)

In terms of collecting information about existing programs, once you agree upon what the criteria are, I would really train and develop a team of investigators. I mean it would be a lay committee with a professional who goes and observes and asks participants and kind of measures what it is that gives and there could be Jewish style but really kind of marking everything down from Jewish ambiance to actual program content from informal to formal. I mean the full range happens in the center. Once these baselines of who are you serving and what is going on now are established. I mean then you go about evaluating. Is this good, is this the most we can do. Are we achieving the objectives of our mission and then how do we go about changing it.(jcc)

The need for measuring outcomes :

The last thing I would have to know or determine at that point is what is the best strategy for implementing that. So, if I decide that my target audience is young families and I am going to make a big push in family education, what is my strategy for making it happen. Do I need a good deal of funding for it, how do I get that? Is marketing an important element, or is it going to sell itself. If it is going to be an important element, how can I develop that? Where can these programs take place? How do I actually then make it happen? Then, of course, last we use evaluation. How do I know at the end of day that I have been successful? How am I going to rate it? (jcc)

Does the school have a clearly enunciated curriculum? Are there goals for each child? Are there objectives? Are these measured in some way? And how? Does the school board work in conjunction with the Director of Education? How is that effectuated? (Rabbi)

Then we turn to a third piece of the formula, piece of the puzzle, and that is that I believe that there should be an understanding of a characteristic personality. In other words, given we know what we want to do and how we want to do it, let's find out if the person who goes through this process in all of the ways we would prefer, comes out the way we think they should. (camp)

Create an internal sense of recognition that it's something they need to do, something that would be useful to do. That's the path for them to be able to continually focus on, are we succeeding, are things getting better? The only way you know that is if you measure something.(central agency)

Questions about measuring outcome -

If indeed there is carryover from the school to the home or from family education from

the home to a more positive attitude toward learning both by the kids and the adults. I would say that each of those pieces of the constellation were effective. Um, be given the diversity within the Jewish population I don't think that we could say any particular observance or any particular group of observers and also I think growth is an important part of it. No matter where you fall on the hierarchy, doing more branching out having Judaism becoming more a part of their lives in a variety of ways is that would be an indicator. Obviously in terms of scientific research the best way to do would be some forms of pre and post assessments. Um, in the end with that perhaps there are recollections would be something that we would need to be satisfied with that we did the research.(jesna)

One, if you had some kind of output measures which we almost have none of in Jewish education. But, if you had that, if you wanted to say, to go back to that one of Adam's favorites examples, is the school effective in teaching Hebrew, you could give the kids a Hebrew test and compare that Hebrew test to the results that you would get out of other places. Now, that is a very tricky thing, because A) we don't have many instruments that are reliable. B) We don't know what the values and goals are of the institution vis-a-vis the specific thing you want to test for. And, C) probably most importantly, we are not entirely sure that testing is going to give you a good measure of what really is success in Jewish education. So, for example, if you want to say Jewish education succeeds insofar as it communicates and hands over a body of information and skills, then you test for that. If you want to say that Jewish education succeeds insofar as it transforms the identify of people, then we don't have good measures for that. (cije)

I think we would know that we had succeeded if people's open and honest sense of discomfort were increased. If we got people talking more openly and honestly about what they were concerned and dissatisfied about in constructive way, I would have some sense that people were beginning to focus on the change process or what needs to be improved or get past that level of self satisfaction.....I think the other thing I would be looking to see is some more serious experimentation with dramatically different approaches. That's not to say that we have to throw out everything that we're doing but I think, you know, hand in hand with a sense of dissatisfaction would be sort of a more serious questioning of whether the way we're currently doing business makes sense and out of that would come some serious experimenting. (central agency)

## INSTITUTIONAL CLIMATE

Institutional climate could be conceived as the construction of "space". When you walk into the building, is this a space where learning occurs? Is this a Jewish space? Is it a safe space where learners and educator-learners can explore and risk?

A space for learning...

At this point, in a school, what does it feel like when you walk in? Is it exciting, do kids

seem to be engaged. Is anything going on? Does it seem interesting to you? Is it really boring or is it interesting? Is anything talked about that has any meaning at all? Whoever you are and do you see kids talking about it as though it is interesting (CIJE)

I would look at the overall attitude within the building. Do kids sound positive? Are they laughing? Are they having a positive experience, a good time? Are they doing serious stuff? Is there real learning? Is homework given or required? Do kids do it? What does the building look like? What are the spaces like in which the kids are learning? Are they kept up to date, clean, are they useful? Are they real educational environments? This is also important. (Rabbi)

A safe space...

to create a kind of environment in which students in the first instance feel it is a safe space for risking, taking on new ideas and new approaches so the challenge to the educator, the challenge I feel is how do you create a culture which serves as a paradigm, that's the word we use, for people who will see the messages that are being transmitted intellectually, actually reflected in the mode of work of the educational institution so we do a lot of things which are meant to create that safe space meaning psychological caring, nurturing, individual attention, student scentedness above all, so that students know we care about them and that we want to help them achieve their optimal potential.(informal)

A Jewish space...

There is the general ambience at the JCC. A sense of walking into a building and knowing that it is a Jewish building. Having stuff around whether there is a library in the center that people can easily have access to, whether it is useful for family or adults. I know that there are many centers that have Challah sales every Friday or little Oneg Shabbat ceremony Friday afternoon where there would be candlelighting and wine and stuff so that people have a sense that this is a Jewish institution. (jcc)

In other words, do people have a different sense walking through the building when that program is going on? Does it contribute to the Jewish ambiance of the center? Do people look at the building differently? That is an important indicator as well.... we speak a lot about the creation of a Jewish neighborhood, in the Jewish Community Center, the idea of walking into the JCC and having sights and sounds and smells and reflection that make one feel that they are in a Jewish neighborhood or you can just sit and schmooze with people, or look around and see interesting things and, although we have that to a certain degree on an ongoing basis, I think a lot of programs provide that. I would like to see it happen more. (jcc)

What kinds of things are done on a daily basis that are Jewish, you know, at every meal are they saying, are they doing a token _____ and their _____. Even though the JCC is not a religious institution, there are certain Jewish behaviors that are, you know, can just be termed Jewish behaviors that are nondenominational and that kids

can be exposed to in a JCC camp ... But the general environment of the camp. Are the cabins named Jewish names. Are different parts of the camp terrain called by Hebrew name. Are the different times of the day you know, is flag racing referred to by in the Hebrew term, is anything Jewish going on in flag racing on a daily basis. So there is general environment. (jcc)

One thing you've mentioned before which I think is very important is the arrangement of the room. How is the room arranged? I have this wonderful video that I've picked up a year ago and have seen 10 times, each time I see it I learn something new from it about a room arrangement, about how important it is and what message it gives to the children and how well you can teach the children and how well they will learn if the room is arranged in a very effective manner.... tell me what makes this room Jewish, there is nothing there, nothing, no pictures, no shabbath posters, nothing, no books. (pre)

The other thing in terms of Jewish schools, is, I think in some way, whether its the board, the faculty, the principal, there needs to be a substratum of articulated Jewish values which characterize the institution. And those values, together with whatever good educational principles you use, those values sort of become the Jewish culture of the school. That can be from the way people are tested in the school, to the way grades are handled, to the way discipline is handled, to the way parents and kids are spoken to and brought in for conferences. And I think when the faculty knows what those values are and has agreed to them and has helped build that, you also get a very effective educational institution. ... That would be how do they handle competition? What is the relationship between counselors and kids? What do they really see as the essential role of the counselor? Is she someone who moves kids around and makes sure they go to activities? Is the counselor someone who really has time with kids? How do they see that role? Is the counselor someone who is really there for the kids or really there because they happen to be a specialist in something that the camp needs and they also double up working in a bunk with kids? It says a lot about what the counselor expectations are and you'd want to know from the director what are the key human values and the key Jewish values that they are concerned (camp)

## CURRICULUM

Most consultants emphasized the relation of curriculum to the institution's goals and its internal coherence through the grades.

Do they have curriculum materials? Do they have a sense of, some kind of statement or vision? Those two things, the goals of the school and the curriculum of the school, in what way do they match up with one another and that I would want to look at. (cije)

Is there internal coherence in the curriculum? You know, as children progress from one grade to another, does the material that they're learning progress with them or is it repetitive, are there gaps or have they thought systematically over a range of years.

You know what it is they intend to cover or, you know, is curriculum aligned back to broader goals and objectives. You know what is it about Hebrew that the institution wants to teach? What is it about bible? What is it about Jewish ethics or values? Which Jewish ethics or values so does the curriculum align back to broader goals that the institution has thought through. So I think all of that is sort of base line assessment. (central agency)

There are certain minima that are real easy to state and then you work backwards from that to see if the program that you are delivering building that. Then you can go back and say, well if they look like this at the end of eighth grade, what do they look like at the end of seventh? sixth? fifth? (day)

Your schedule would start to look differently and you would start to see different content to it. I will give you an example from our camps. We used to spend a lot of time for a number of years taking kids out of camp for programming at a certain point in rema development. The last six years, one of the values that we have come to stress in camp and with other camps, too, is the value of outdoor education and the value of ecology and a Jewish approach to the world. The physical world and the social world. You will now see in all of our camps almost, a different way of structuring certain age groups in time because those kinds of projects are not 45-minute art classes. They need major groups of time where kids can go and do a social service project, spend time out of camp at a half a day at a time, have to pack lunches, and so the whole program of how certain age groups work, are completely different now than they were six years ago. And that comes out of another value which is now powering the program. The problem is when you have a program that has no values or clarified values behind it, then the program just becomes a series of we do what we do because that's what we like to do at this camp.....The values of the camp and then when you link that with the age appropriate things for kids, begins to power what the program looks like and Then it will power the kind of staff you hire. That's why his question, "Why don't you just send us four rabbinical students and then we'll be Jewish, too," just completely missed the point. That's like saying, on the one hand, with teachers making, produce us 100 really good day school teachers or fill my school with really good day school teachers and then I will have a good day school. Well, you'll certainly have a better basis to build a day school, but that doesn't mean necessarily that it will have an organic vision to it. (camp)

If the vision of an effective Jewish educational institution is about learned outcomes which reach beyond the confines of the institution (as discussed in the Vision section), then...

It has to in some way be connected to your life so that if you're studying text for example we can say, okay, so you know bible stories. What's the importance of learning bible stories.....we're not studying about reformed Judaism, we're studying how to, we learning how to be reformed Jews.....One could be to look at their practice but another thing would be to look at the meaning that they derive out of it in terms of how they live their lives and what are the concepts, what are the values that you derive from _____ even if you don't practice it (cije)

Does it involve everyone in an institution so that if you take something like a day school

where the primary focus is on children if its in elementary day school right through to the teenagers if you're doing the upper level. Who else is co-active to be a part of that educational process. How do they reach out, how do they communicate to the people who touch the children, the families, the brothers, the sisters, the parents, the grandparents, the aunts, the uncles. So that's a characteristic I would look at programmatically. How is the program structured to transmit the philosophies of value that they're trying to transmit. So that's one. I would say the characteristic is, one characteristic if I wanted to be concise about it would be the kind of program that exists in the school. So that's effective and whether or not it accomplishes what it sets out to do in it's mission statement and its goals so that's one. (central agency)

So whether it's a school or a camp or a center, you know, or a trip to Israel that part of the effectiveness of that Jewish educational experience or institution is going to be how well equipped are people once they have gone through the institution to go to the next step on their own...those students will also have gained the ability to approach a text that they have not yet studied and with the tools that they have learned, dissect and interpret and understand so that the school would know, 1) did they learn the twenty, 2) did they been enabled, had they learned that skill and the way they would know that would be clearly reflected in that returning 8th grade class in the Fall so if they are effective, it should change that 8th grade curriculum. (jcc)

What supplementary opportunities beyond the supplementary school are available extra-curricular, are there Shabbatonim, do kids go to Jewish camps, are Jewish camps encouraged, required, highly suggested or those types of things? What about Shabbat dinners within the synagogue? What about holiday celebrations? What is happening for kids on the holidays? And families. Those kinds of things. Is there the latest use of new and effective tools? Printed materials, books, etc. as well as some of the film, video and computer use and all those kinds of things which are effective tools in education. Are they being applied to the Jewish education as well? In that, and I don't mean that it only takes money, but when a child walks into a classroom or comes from a public school in which they have language labs and specialists and tutors for this and that and they come into the religious school and are looking at a textbook that has pictures of kids that are clearly 30 years of age, that is going to be an immediate visual turn off and the kids will get the feeling, rightly or wrongly, that education is not valued here because, if it was, they would using the same kind of advanced stuff that they are getting. Also, we are in a technological age and we need to use those tools in order to attract kids. (Rabbi)


FINANCES AND PHYSICAL RESOURCES

Finances and physical resources were deemed important as they demonstrate the institutional support for its goals (vision).

Let's pretend it's a school for a second. You would probably find funding for programs, probably private funding, ways to send teachers to conferences, bringing in staff development kinds of projects to the school. It could be in the form of the art specialist

or the music depending on the vision of the place. That doesn't necessarily mean anything unless it fits into some picture. (cije)

if there is a curriculum that says that we are trying to teach, oh, I don't know, "ritual", then does the budget allow for the purchase, acquisition or possession in support of ritual objects. (camp)

I think money is important too. That there's money and again you can figure out what the basics are in terms of you have to have dollars for staff and dollars for materials but I really look to the extra pieces of what type of funding is provided for conferences both for the education director and for teachers. What kind of leeway is there in terms of materials. Is it just the bottom line or is there opportunity for getting some really nice things that can be put in the hands of the children and can really liven the classroom setting. So how they spend their money I would say is important and what type of money is made available to education beyond the bare bones or what would be considered the bare bones. I think a lot of these factors though break down when you talk about smaller congregations because there I think the way people are even more critical than the professionals because usually they have very small professional staffs. It made me think of Harvey Whinaker's congregation, it's very small. And there are sometimes and if they don't have a lot of money there are ways of compensating for that so but you'd have to look for it to see if there's a higher level of lay participation and volunteerism among the parents. Not that you can't have any in a large congregation but sometimes in a small congregation that can make up for the lack of actual dollars available. (cije)

However,,,

I think the final analysis is really not the physical plant, although Jewish camps are competing with sports camps and specialty camps so that there has been a tendency to upgrade the sports and for the older campers to include camping kinds of activities where they leave the campgrounds, again to compete. I don't think that that necessarily means that you have to lose the Judaic component of the program. So I do think that that part of the program is important. Again, it is not necessarily the physical facility, although I guess you would need a certain physical facility to offer a particular activity. (camp)


## PARENTS


In addition to the role of parents in sharing the institution's vision and in being part of a learning institution...

Some raised the issue of the compatibility of the family's Jewish practices with the goals and curriculum of the institutions...

[Question: In terms of creating the type of student you want to create, how important do find the parents own practices to be? Response:] You have put your finger on one of the biggest pieces of all of this. That is, when we talk about creating certain kinds of students, helping bring people, whether they be small people, or larger people, through a process where they become a particular kind of student demands, in many ways, for there to be real context for that kind of a student....And, what is shabat? Is shabat Friday night? For some people it is only Friday and not Saturday. For some people, it is only Saturday morning. So how do we begin to define those kinds of things and the role of home life and the role of parents, and the role of context for this kind of learning, if it is to be considered critical learning and value based learning, if it in no way, shape or form, is aligned with the context of that child's reality, then it goes nowhere. ...what is interesting about this notion of taking stock of where your parents are, do we then begin to, in order to create an alignment of context for students and for families, do we then revert to the lowest common denominator of comfort level, of understanding and of ability? (suppl)

About the people. I would find out a little bit of family background and Jewish background. How they see themselves in their role in the institution. How they see themselves in connection with the Jewish community. What it is they feel they contribute to the enterprise of that particular Jewish community center and what it is that they expect and then specifically what it is they expect Jewishly. (JCC)

Concerning parental participation (as was discussed in the Vision section)...

Is this curbside Judaism in which kids are dropped off and the parents don't venture in? What kinds of experiences are happening for parents in the building? Are there meetings, classes, are there educational opportunities? Is there interfacing between the kids? Is there an active family education ongoing program for the parents as well? Are there other adults learning in the building so that kids get to see a role model for them? Another words, maybe hebrew classes are going on for adults in the building so that, while kids are pulling up to the curb, other adults are coming with their sack of books as well? I think these are all part of the parcel. (Rabbi)

and an important caveat on parental participation...

all of this that I'm describing says that an effective school has a high degree of participation so you would need to know what opportunities are there for parents to participate in their children's education and that could be like a family education program but it could also be in terms of what they do at home like we had a temple in Atlanta, we had a major youth library program and the purpose of that was to get the children to read books because we knew they wouldn't read textbooks so from fiction you can learn a lot about Jewish life and a world view of Judaism and there's one issue of participation would be you know are people checking out the books, are they taking

14

them home, is there story telling, bedtime reading, things of that sort would be another way of looking for opportunities for participation because I think that the parents do need to be involved in the education but very often they have to be shown ways that they can be involved. We can't assume a lot of people say you know it's terrible that parents just drop their kids off at religious school. I say on the other hand so what opportunities have you made for them to be able to participate. You can't make that statement until you've given them many different opportunities and they fail to participate. Because otherwise it's your problem not theirs.(cije)

## EDUCATORS

The quality of the educational staff (in terms of skills and training) was mostly discussed in reference to the goals (vision) of the institution.

> The issue for me, is do all of the elements of the institution support and reflect the goals of the educational function of the institution. Then I would look at the personnel and see if they have skills and abilities to implement those goals. (???)

> Let's say a goal was to have kids speak Hebrew informally. If you don't have staff who can speak Hebrew, you can't reach that goal. So they are very closely connected.(camp)

Some were against focusing too much on the quality of the educators ...

> ...just doubling the salaries of the teachers in the afternoon school and getting PHD's to teach in those places, is not enough. On the other hand, if you create a cadre of educated parents, they will demand PHD's, because they won't allow their kids, if they care about Maimonides as much as Shakespeare. They will no more allow their kids to have a half hour a week with somebody who doesn't really know Maimonides as they would a half hour a week with somebody a week with somebody who is illiterate giving them Shakespeare. No one would allow that. .... it is saying is this the kind of place you would send your kids if they were teaching English, Math, Social Studies and great English novels? (fed)

> I find there is some correlation between the teacher's Judaic knowledge base and what she does in the classroom, but then you have another issue and the other issue is, what constitutes quality early childhood.....'ll tell you, I probably would choose the person who had the good secular background and was ? because that is really important. These children are really very little and need to be nurtured and I would just try to do as much inservice as I could to help with the Judaica or I would see doing them together. I just have to tell you an interesting story, I never forgot it. Many, many years ago, one of the directors of one of our bigger schools said to me, she only comes with a very limited Jewish background, she said, why do the teachers, why do I have to learn all these holidays, why can't I learn it along with the children. It almost blew my mind. I said to

15

her, how would you feel if your child was in first grade with a teacher who knew the alphabet and nothing more. You would say how can you teach my child? She doesn't know enough. You are asking the exact same question. She never raised it again. There are two parts. One is the Judaic knowledge, the other thing is I think it is very hard for teachers, especially of very, very young children who do hands-on, experiential things, to teach children things that they themselves have never experienced. If you are asking a teacher to teach something about shabbath or a holiday, but she herself has never experienced it, it is like rote.(pre)

And the question that one of the JCC educators asked is, how do we, why don't you send us some of your wonderful rabbinical students so our camp could be Jewish, too? Now, that statement is a complete misunderstanding of how you build an educational institution. And I said to him, suppose I sent you four rabbinical students this summer? What would you have them do? Really, what difference could they possibly make within a staff of let's say, 150 counselors and 300 kids, all of whom know that they are working within a certain existing culture? I would send you staff when I knew what the culture is you wanted to create and what the culture was that you and what the values behind it were that you wanted to build. And until you can answer that question the way the other three camps have answered it, then there is no sense deciding what kind of staff to send you. What am I going to send you, a really good dovoner from rabbinical school? What good is that going to do for you? Unless dovoning is one of the things you think is of value that is central to your camping purpose. So, the first thing I think you need to do is get a sense from the staff, the real functional culture. Jewish culture and values culture of the camp. (camp)

Significant emphasis was placed on the educator as a role model...

It's the differences that Jewish educational institution everything is potentially value laden which affects not just the subject matter but how things are taught and how all the people involved relate to one another. That Judaism is not just subject but a way of life and behavior. What that means is that the people representing an institution also serve as role models in everything from contract negotiation to how they make a flyer and how they communicate with parents. (jcc)

Because particularly in the area of working with Jewish, not Jewish, any teenager if they for a second feel that you are false with them, you've lost them and what happens is that if you advocate a particular lifestyle and do not live that lifestyle. So if you talk about the laws of kashrut, that you yourself don't keep kosher, forget it, it's useless...So the issue of being a dugma is essential (youth)

Now, but there is a very subtle component which you can't really see, and that is the teacher is probably the most important person there who kind of really, somebody says that Judaism is caught as well as taught, it is her, it is almost all her, it is her attitudes toward Judaism. In other words, when Friday comes around, and the children have a practice shabbath, does she do it because it is in the curriculum and it says to do it so she pulls out the stuff and does it, and then quickly gets over it and puts it away. Or does she do it by making that day really very special for the children so that they know

16

that even though they are not going to be in school on shabbath, they still have this preparation for shabbath which makes it a very special time for them. In other words, are there books out, is there music, is there something that creates a very special environment for them because for many of these children, this is their only experience of shabbath that they are going to have in school so you really have to maximize it. (pre)

Are the teachers trained? Are they Jewish role models? Do they live Jewish lifestyles? Is the teacher who teaches about Shabbat there at services on Shabbat? Those kinds of things. Another words, is there a lack of dissonance between what is being taught and what is being lived on the parts of the teachers, faculty, administrators, etc.? (Rabbi)

Related to this, respect for educators...

I think that the professionals who work in that organization I want to say are well respected. (youth)

Many mentioned the importnace of educators continuing to learn, but as a component of the institutions learning process (as mentioned in the Vision section).

It would be an important component in reaching the goals. I don't think it can be an end in and of itself....refine their skills, be more reflective about their practice, but also having an expectation that they will continue to learn and continue to stretch themselves in terms of both the practice of education in today's content. (comm)

If there is time for teachers to think together, staff development in some fashion even if it is at regular staff meetings, in synagogues it is usually lay leadership, mobilizing a variety of people both those that have money and those that don't have money. People with ideas, not necessarily money. It is usually issues of programs that you can see that meet the needs of a variety of kinds of people        that could keep within the frame. It's not something for everybody, but it's something...There is some kind of study component. It's interesting how few institutions have regular staff meetings in which people do any kind of planning with regularity. Any kind of checking back and forth. Any kind of regular communication, any kind of feedback, any kind of evaluation system, any kind of accountability. If you find a place like that, you are more likely to find a place that's worth looking it. It doesn't say that they have everything but, at least, they have component parts. If those things are missing, if there is no accountability, if there is no regular communication, if there are no ways in which people can air their concerns, their grievances. If there is no way to plan together, then you don't have an organization that is going to be a good educating organization cause it's just gonna....if it's always crisis oriented.(cije)

It's critical. If everybody's not on the same wavelength, that leads me to one other criteria or requisite. Regular meetings of the faculty on the same principle that they ought to be involved in shaping the institution and if it's to be a consistently transmitted culture, it needs all people to be operating on the same wavelength otherwise you have dissidence and mixed messages and the students get confused and that's not safe and

not conducive to full attention to the learning agenda.(informal)

The third characteristic, I think, is to give the professionals a part in the creation of the curriculum and the structure of the educational institution so that there is a real sense of participation in decision-making by the line people. (camp)

I'm talking about two kinds of meetings. Both are educational. Regular faculty meetings to talk about administrative procedures, problems with students, communication with family and our own work together and our own morale and relationships. The other is in-service development and training where time is put aside periodically for some agreed upon subject to be done collaboratively with the faculty, agreed upon subjects and resources to do some learning about whatever it is we want to work on. I think that's quite important.(informal)

## LEARNERS

Much of the discussion about learners took place under the issue of "outcomes" in the Vision section. However, some other areas were raised.

That would be a measure of success that if you increase numbers in participation on a lot of levels. Do you have long waiting lists for all of your Jewish schools? That is a measure of success. Do you have so much adult study going on that you can find something at any hour of the day and it can be anything from _____ content study to a lunchtime discussion of yeah, I've got a mother on life support and I don't know what to do about it. I need to sit around and discuss that with somebody - just a friend who has enough knowledge to synagogue participation. It could be any range of things - it can be making the first donation to the Federation. I mean I do consider that participation.(central agency)

One of the goals that I had last year for _____ was #1 to increase the numbers of students attending and that always becomes a way of judging, you know the numbers game and in that case we had a situation where we had gone from 79 students the year before we went to 114. That was an indicator but that was only the beginning of the year. All that told me was that what we had done up, we had done a better marketing job perhaps than had been done before. And maybe it wasn't the marketing job, maybe it was that the number of kids in that age cohort for this particular birth year was much higher. So there's a whole range of possibilities there. But that was only the beginning of the year so that didn't tell us if we succeeded. How I knew at the end of the year we had succeeded. #1 we had a higher rate of retention through the ten Sunday sessions and the five weekend _____. And we had that information because it's been collected for the last 4 or 5 years and we literally could look session to session, weekend to weekend to know what the numbers looked like and we're definitely in an 87 or 88 percent sort of retention rate and the feeling of the bureau board, you know, my supervisors what not, that was #1 we were doing better

18

than we normally had before and that figure in itself was a reasonable figure given what tends to happen with the attrition rate with teenagers, with anybody over a long term project, you know, 15 week project spanning from September to May. Then, there's a much more, how shall I say this, much more personal responses from the students, from their parents. I had parents who called me and thanked me personally for recognizing, you know, it's generally a kid who's having trouble that this comes from. You know when you recognize the child, you know, are able to take a child under your wing kind of thing. Those are the things that don't usually come out on. I had many, many responses from kids this past year. It was a good feeling.(youth)

We are looking at numbers of people multiplied by the numbers of hours that they are actually engaged in Jewish learning as drawing up kind of a chart in all of our programming to determine one way of determining growth or effectiveness. That would be one element. (jcc)

While some mentioned the importance of learners enjoying the program, a signifcant caveat was raised about learner satisfaction...

another way you can evaluate, is customer satisfaction. Now, I may have mentioned this to you before, that I was once involved in a program where we had hired a guy whose a person I like, to evaluate the program and he said to me after the first couple of days, I said to him, "how do you think it is going?" And he said, "customer satisfaction is very high," and then he paused and said, "of course, in Jewish education, customer satisfaction is not our only value.(cije)

## LEADERSHIP

Leadership was not disussed greatly by the consultants. Perhaps, it was because (as one said) there are different styles of effective leadership. Perhaps, it was because effective leadership is part and parcel of everthing else. However, a few suggestions were made.

I don't think there is one model of leadership. I think there are different ways of being a leader. ... So I don't think you can generalize well about leadership...But it's a thing, you pretty much know an institution has it when you listen to the people talk in the institution. Because what will happen in an institution of good leadership, people will have a sense that they are moving in a direction that they are organized that there is something thoughtful going on. When you don't have good leadership, you'll have the staff saying that they feel that the place is adrift, that they feel like they don't know who reports to whom. I think you can get that from interviewing the staff people in an institution..... and also that gives people a sense that they are empowered to work there. And to do their own thing. (cije)

The breadth of knowledge that the school director had about what was happening in different classes, the extent to which the person had you know could evidence warm, personal relations with both teachers and students. (central agency)

If an administrator walked in, he didn't necessarily just sit at the back of the room, she would always come in and if the class was doing individual work or whatever, and the teacher needed another pair of hands, the administrator was there for them. That ability to create a team spirit and a team effort, I think, is critical for effective Jewish education. (camp)

In other words my own feeling is that we don't need those revolutionary educators, but I think what we need in many instances is a person who is really well organized (adult)


## THE PARENT ORGANIZATION


For supplemental schools housed within synagogues, the congregation and its relationship to the school and to learning itself were considered to be very important...

I think that the only chance that supplementary education has is as a part of a larger fabric of congregational life. I think those are one and the same at this point in time. (Rabbi)

Number one the most important pieces where religious education fits in the overall scheme of the Synagogue itself. Um, is it a hard priority, is it in the mission statement and then how does the congregation support it and then we are talking about financial resources, staff resources, etc. So I think that that's a primary piece and maybe a philosophical underpinning. I think in this area of lip services parent and children are the most important, we've all heard it. How this synagogue begins to organizes itself and sees in itself, um, vis-a-vis, the education of children, but it has to be more than just children, um, and that is the larger picture. Um, in other words I think a congregation can have an effective supplementary school if it understands itself as primarily the congregation does, that is, as primarily a teacher of Torah. If a congregation sees that its primary focus is one of education and learning then I think that becomes a kind of a basis for what will then flow out of it. What I'm saying is that technique and technology is important and people who can effectively deliver service are also important. The Technicians, um, but unless that flows out of a larger picture, a larger piece, then I think that that's whatever we do technically is going to have short term effect and not long term meaning. So what I would say an effective religious school or supplementary school than I would look at what is happening in that congregation as a whole and how is learning a part and parcel of what goes on within the very fabric of the synagogue. (Rabbi)

The characteristics of an effective school is that in some sense it is a community but there is that interrelatedness among child and parent and among all of the congregational members in that within the congregation there is a sense of community so it goes a little bit to what Reemer talks about in terms of is the school a beloved child, a step child. It gets into, you could derive it from the attitudes of how people view this school. Is it, do they feel like that everyone should support it or should it only be supported by the people financially I mean.(cije)

We'd really have to look at adults and how their involved in their own learning and how that interplays with the education and learning of children and adults I don't mean just people with children. I mean all adults within the congregation.... Are people learning? Participating in learning activities and the congregation are they engaging in learning experiences outside of the congregation because when you start talking about adult education, there's a lot of thing that we do on our own that is self-study whether it be by going to a movie with Jewish content or reading a book with Jewish content, talking about politics, Israeli politics with our friends. There's a lot of opportunities for learning and how much that's part of the culture of the congregation and reinforced and enable shall we say. I think it's important so when I see a best practices of supplementary schools, I worry that may not be the best way of looking at the whole enterprise.(cije)

Do meetings have a dvar Torah? Do congregational committees spend time studying issues from Jewish prospective? Is there a daily adult education opportunities? How are learners or people who involve themselves in the learning process looked at within a synagogue? What places of authority do they have? What honors do they receive etc.? What is the interface between adult learning and children's learning? What kind of family education? What requirements are there for a child from early on? When does education begin for kids? What is the attitude towards children once they become Bar or Bat Mitzvahed? Is it acceptable for kids to drop out from school? Is the expectation the norm for kids to continue until what age? What happens after confirmation? Those kinds of things, all form the kind of total fabric of education within the school. So I think those are very, very important parts. (Rabbi)

In particular, the role of the Rabbi...

Has the rabbi has any engagement with teachers? Does the rabbi ever come to a staff meeting? Are teachers ever invited to the rabbi's home? Does the rabbi talk to the educational director regularly? Do they share goals with the school? Do they share goals for their teachers? Does the school sit inside of the congregation in a way that makes sense?(cije)

Then I think there is the role of the interaction of the rabbi within the congregational school. Where is the rabbi? Is the rabbi in the classroom? Is the rabbi in the building? Does the rabbi know kids by name? Is the rabbi an active participant in the educational process? Another thing that I think is important is what is the religious message that kids are getting and acting out? Is there a Tefilah that kids attend and participate in? What's the feeling when one is in there? Is that a positive or is it a rote kind of experience? Is the rabbi one of the participants in the service or a leader of the service? Is the cantor there? These send messages to children and their parents that this is a priority. (Rabbi)

Community was deemd important by most of the consultants, as it related to their struggle to develop an effective educational institution.

The community has resources which we could use and services which we would not want to duplicate.

> the third is where does this fit into the rest of the community and how? And, what means are available in order to use other resources that exist, because given the fact that the community today has limited resources everywhere, I would want to know that....So that I don't need to have everybody on my staff who can do x or y as long as I know how to find them in the rest of the community. (camp)

There is also a need to map community services against community needs. Where are the gaps?

> You have to know all of the pieces of the puzzle - what's going on Jewishly in the community and try to find out. For example, there is a huge gap in the area of singles. Single Jewish adults. Nobody is serving them. And even the JCC isn't serving them. In order to become effective, I think it would be really great to do a Jewish audit of the community. And get a sense of what is going on where and who is doing it. How can friendships be forged? I think knowing the community is really a key piece of it.(jcc)

> I would want to know what are the different products, either available in the community or that could be created in the community which could reach that target market. So for instance, if we decided our target market was young families, then are their resources in the community that could, or in the institution, or that can be available for the institution, that could develop Jewish family education programming? If my target market was the unaffiliated, are there resources that help us in that respect in terms of marketing, in terms of young, dynamic teachers, that could be attractive or big names that might get people into a door. Are there possibilities for more active things like trips, that might attract people or retreats, etc. So, I would try to determine whether the program opportunities are available in the community or within the institution. (jcc)

And a market analysis...

> I would need to know is who the target audience is? Who are we trying to reach in the program? How does that contribute to the goals and objectives of the program? (jcc)

It was deemed important to understand the culture of the community in order to know how to engage in change. Institutional change sometimes would require community resources (as eluded to above) and/or community support.

See that's a cultural thing in the community. I think in a community like this what I learned about Atlanta and it may change next week - you need to kind of show them. It's a show me community so you need to do things in microcosm first. I think there are movers and shakers who will get things done, but you need to get them co-opted as one. There are other communities like Los Angeles where I am from, and it may be that it is because it is a larger community - that you can just kind of can do something and people will buy in. (central agency)

I'd need to know where the institution stood relative to those indicators that we have been talking about. Whether they have even thought about it. Um, I need to know, um, the level of community coherence, um, and collaboration among and between the institutions. I'd want to know about the institutions individually and then their relationships to each other....Um, then does the school feel they are in competition. Do they do things together. Would they be amenable to, um, engaging in collaborative you know off the bat, at this point in time, would they, if they all agreed that one of things that would enable them to be really effective would be a higher quality of personnel for example. Um, would they all work together and not just give lip service to the notion of a community wide program, process, whatever to ensuring that there would be a very qualified teacher, educator pool within the community. Or are they still of the mindset that when a good teacher comes to town they outbid each other and try to steal him or her from each other, which occurs in a lot of communities. Um, I guess kind of a sense of the turf issues, Jewish education very often is the playing field upon which a lot of other turf issue wind up getting beaten out. So I would want to know about that and I would want to know about the general support in the community for Jewish education among the lay leaders especially among the federation, but if there are other important Jewish institutions in the community. I would want to know about their level of Jewish knowledge and education, of the leaders themselves, very often if they don't, if they themselves are not committed to Jewish learning, um, they are only thinking about it in very limited terms, um, kind of the continuity terms that you sometimes hear that the next generation should be Jewish and I say hey, what about this generation, you are not dead yet. Um, but know if they think about it mostly as for the others then I don't think you get the same kind of support and passion from the gut that you get from people who themselves not that necessarily they are very learned themselves at this point in time, but they are committed to increasing.(jesna)

Finally, since effective institutions have "outcomes" which extend beyond their walls (as discussed in the Vision section) knowledge of other community activites in which one's students are participating is important.

An effective program goes well beyond what's happening just to those children and certainly goes beyond the walls of the classroom. So that what families are doing the opportunities for adult learning are all part of it in terms of audiences and opportunities for education that go beyond the congregation such as camping, or informal education that's often within the congregation which is the educational aspects of youth programming. Camping in particular would be the one that occurs that I can think of on the top of my head right now that would occur outside of the congregation. Then within

23

the congregation I think an effective schooling program breaks down the classroom walls in several ways. The main principle being though that the warning that goes on in the classroom is in some related to experience or experiential elements but there's a context in which much of that warning has some relevance. So for example, if you are studying in the classroom the Jewish holidays that there are ways in which that becomes practice either in the home, the life of the congregation. If you're talking about the life cycles the same thing. (cije)


BUT, on community visions...

While many consultants deemed the mapping of community resources, needs, target populations and major players to be important, the idea of a community vision was discussed by the consultants with significant ambivalence. On the one hand, it was doubted whether a communty's vision could extend beyond advocating support for more effective educational institutions. On the other hand, it was deemed that a community requires a more concrete vision in order to decide where money and time should be invested.

> Caveat:
> Roberta insightfully pointed out (in a discussion we had after the Goals Seminar) that when people talk about community they usually mean Federation. It may not be that we need a communtiy vision, as much as that Federation needs its own vision. Thus, perhaps its not an issue of institutional profiles versus a community profile. Rather, can we develop a "taking stock" process for Federations (that they would use toward becoming vision-driven)?

I would focus it at the institutional level. One of the questions we run up against all the time is, is there a particular community vision and the reality is that in order to serve as diverse a constituency as we have, you know from Jewish Secular Schools to right wing Orthodox Day Schools, there's no one vision we can put out there for what is an educated Jew, what people ideally ought to know coming out of their experience. Those questions are bound up by the individual ideology and philosophy of particular institutions. So where we can be helpful is in providing a process and recourse within that process to help institutions think about these issues and take them the logical next steps of redesigning curriculum and doing future training that are aligned around their goals. We can help them think about their goals but their goals ultimately have to flow out of what they are about...... Now I mean there are flaws with that you know which I think we will be continuing to struggle with. When we get the priority questions about where we get our energy and resources. You get at the questions, well what does our leadership believe is right and should we invest a lot in the workman's circle school when we don't really believe for the long-term that what they have to offer is going to have a meaningful impact on community survival.(cental agency)

Part of it is, if, creating the community vision gives you a certain, I think that things are interdependent. Because creating a certain kind of community vision provides permission for the congregation to make internal changes in the congregation. (federation)

24

The other part of this, which I think is important, and this came to me after a long, hard struggle with a lot people and a lot of thinking, but you know, you've got to include a religious piece to this vision. You can't, I mean you at least have to open yourself to the question, can there be continuity, absent a struggle with the God of Israel. You don't have to accept it, and I know not everybody's going to be a total believer, and that's not the ticket to Jewish continuity, but a struggle with the religious vision, we've never had continuity across generations. I can turn a guy on by sending him to Israel. I can turn a person on by sending them to the Holocaust museum. I can't give them a transmissible vision, and a transmissible life out of those experiences. (federation)

I think an effective jewish education allows people to know the whole spectrum of Jewish life from _____ practice to modern history, modern Jewish history and that a person forms his own identity within that spectrum and decides what kind of a Jew he is and I think that's an effective Jewish educational institution.(central agency)

## ON THE "TAKING STOCK" PROCESS (IN GENERAL)

Some consultants pointed out if CIJE could encourage institutions to undertake the "Taking Stock" process, that in and of itself would be beneficial.

Because it forces you to sit down and have the conversations, you know, sometimes we are forced to document things, you may never even look at that document again, but the process of creating it forces certain types of talking within the institution. (day)

There's a lack in our community of utilizing these processes, because I think we are immature institutions in general....I think that's pretty typical of Jewish community institutions, the afternoon schools as well, just now beginning to hear about the idea of self-assessment, goal setting and all of that....See I don't think you have to make a process, I think you have to sell people on doing it.....I think you are probably always too green to do it without some support. I do think you need a consultant to help set up the process. Cause you always have some leadership, whether it be professional or board who are initiates, who are beginners....No matter how desirous you are reflecting. You do need someone else to hold up the mirror for you.... I think it's very important to have relationships with other institutions which have at least some kind of similarities. (day)

My favorite story is of Elie Weisel who came home from school and his mother didn't say what did you learn today but what questions did you ask. (central agency)

The most significant thing I learned from the consultations was the need to look at an educational institution in a systemic fashion. The relationship between the parts is at least as important (if not more) as the parts themselves.

Talking about the relationship of vision to (everything)...

You're a really good educational thinker, you can sit down in a room and say, okay, how is it going to impactt the teachers I hire? How is this going to impact the curriculum that we use? How is this going to impact when we have assemblies and when we don't have assemblies? Do we give _____, don't we give _____.
Does everyone one wear it? Do we talk about it, don't we talk about it? Do we have _____ part of the school, don't we have _____? I mean it really has to do with everything. How much money are we going to spend on any one thing in this school? How much time are we going to spend on any one thing in this school? One of the things actually, so interesting, one of the ways that I actually learned to think about how the things were actually connected like that was at camp. And when I say that they did, I sort of a _____ for a person who came into through their educational system in terms of what it was about. You learned how to think educationally or how to think connectedly about all the different pieces of the program. If you were doing this and you weren't doing this, what were you trading off? Which was the more beneficial in terms of your time? If you have 14 things, how many of them could you get in. Do you know what they did, this is really wonderful. They had a grid. I haven't seen one in a long time. I don't know if it's as wonderful as, but in thinking here's how this grid went. What are the kinds of experiences we want a kid to have in camp? A social experience, a religion experience, an aesthetic experience, a re-building experience, an experience of leadership. What are the possibilities of a day in camp and where could any of these fit in and the work at thinking about how are you going to program for kids to have these kinds of opportunities in the course of a summer. In that regard, it was extraordinarily sophisticated in terms of what it did. (cije)

CIJE

MONITORING, EVALUATION AND FEEDBACK PROJECT

# INSTITUTIONAL PROFILES

# I. DEFINITION

The Institutional Profiles have been conceived as a self-study process (with accompanying instrumentation) by which educational institutions can take stock of their organizational reality, as a necessary prelude for engaging successfully in planned change. It combines the first two steps in CIJE's model of Research to Analysis to Planning.

## II. RELATION TO THE GOALS PROJECT

In order for educational institutions to change toward becoming vision-driven, they must nurture the dynamic tension between what is and what (they think) ought to be. A process is needed through which educational institutions can gain accurate perceptions of their systemic realities, acquire a sense of alternative possibilities, and move beyond where they are now.

## III. THE INSTITUTIONAL PROFILES WILL ASSIST EDUCATIONAL INSTITUTIONS . . .

1.  in gaining accurate systemic perceptions of their institutions;

2.  in acquiring a sense of alternative possibilities;

3.  in obtaining knowledge about their institutions and their communities that will be needed to engage successfully in observable and sustained change:

    a.  base-line data;

    b.  knowledge of available resources (i.e., financial, physical, and personnel);

    c.  knowledge of limiting conditions in the institution and the community;

4.  in nurturing a dynamic tension between what is and what ought to be.

# IV. ISSUES TO ADDRESS

## 1. Degree of Structure:

Will each educational institution construct (more or less) unique Institutional Profiles based on certain, given principles?

<div align="center">or</div>

Will each educational institution follow a (relatively) structured set of procedures for the creation of analogous Institutional Profiles?

## 2. Institutional versus communal levels:

Should we develop a process (and accompanying instrumentation) by which communities (i.e., continuity commissions and other communal bodies) can construct communal "Profiles", as a necessary prelude for engaging successfully in planned change?

<div align="center">or</div>

Should we focus solely on the development of Institutional Profiles for individual, educational institutions?

# V. WHERE TO GO FROM HERE?

1. Work with CIJE staff to further develop the Institutional Profiles in line with the Goals Project and other CIJE activities.

2. Design the instrumentation for the Institutional Profiles.

3. Pre-test and refine the process and instrumentation.

From:     EUNICE::"74104.3335@compuserve.com" 24-FEB-1995 10:30:26.84
To:       Adam Gamoran (gamoran)
CC:       Ellen Goldring (goldrieb@ctrvax.vanderbilt.edu)
Subj:     Memo to Dan & Dan

Adam & Ellen,

I wrote, but did not send yet, the following memo to Dan Pekarsky & Dan
Marom on the Institutional Profiles. As I mentioned before, the materials
we used for the MEF Advisory meeting in the Fall were to thin (by
themselves) to provide an adequate understanding of how we were
conceiving the Institutional Profiles. The following memo is based on
those materials, but includes additional materials that we had chosen not
to include in our initial presentation to the Advisory committee. Please
review the following memo to make sure that it's (more or less) fine with
you BEFORE I send it to D&D (which I would like to do at the beginning of
next week). As I stated in the introductory part of the memo, it is only
a "tentative and rough sketch" of our ideas to date of which we do not
agree on every element or the direction it will take in relation to the
Goals Project.

Bill

Dan & Dan,

Sorry for the delay in sending you this memo on the Institutional
Profiles. Other activities have kept me rather busy lately.

This memo will summarize our (MEF's) thoughts to date on the concept of
Institutional Profiles as related to the Goals Project. However, it
should be noted that throughout the history of the Institutional
Profiles project, the purpose of the Institutional Profiles has received
as much debate and disagreement as its content. Amongst ourselves, we
(MEF) do not agree on every element in it, nor are we certain as to
exactly how it would be played out in relation to the Goals Project.
Please understand the following as a tentative and rough sketch of the
possible what and why of Institutional Profiles. Hopefully, it will
provoke some thought and be the basis for a continued discussion.

A final caveat before I begin:
The language below refers specifically to educational institutions.
However, it may be appropriate and beneficial to talk about "Communal
Profiles" by which communities can take stock of themselves.

Bill


        THE CONCEPT OF INSTITUTIONAL PROFILES

We (MEF) have conceived the idea of Institutional Profiles as a self-
study process (with accompanying instrumentation) by which educational
institutions can take stock of their organizational reality, as a
necessary prelude for engaging in planned change. It combines the first
two steps in CIJE's model of Research to Analysis to Planning.

It's envisioned relationship to the Goals Project is premised on the
assumption that in order for educational institutions to change toward
becoming vision-driven, they must nurture the dynamic tension between
what is and what (they think) ought to be. Thus, a process is needed

through which educational institutions can gain an accurate perception of their systemic realities (what is), acquire a sense of alternative possibilities, and move beyond where they are now.

At the outset, we realized that this taking stock process could involve the institutional personnel in exploring a vast number of possible areas. Among others, it could include:
- What is their vision?
- Is the vision shared by students, parents, staff and the leadership?
- How is their vision currently integrated into curriculum, staff training, etc.?
- Number of students
- Student outcomes
- Expertise and training of staff
- Leadership
- Building capacity
- Finances/budget.

Given the vast universe of possible areas which could be explored, it was felt necessary that we narrow the focus of the Institutional Profiles.

Thus, in June of 1994, we consulted with 23 experts in the field of Jewish education, from a variety of settings and denominational affiliations. We asked them two questions:
1. What are the characteristics of an effective Jewish educational institution?
2. If you wanted to improve a particular Jewish educational institution, what would you need to know and how would you know if you succeeded?

[If desired, I can provide you with a categorized selection of the consultants' responses which can provide an informal summary of their views.]

From the consultations, we learned three (overlapping) guidelines for developing a taking stock process.

1. The first of these is that the general focus for the taking stock process should be the concept of "learning within institutions".
    - Who learns? When? Where?
    - How does one's learning relate to the learning of others? (For instance, how does the learning of a teacher relate to the learning of her students?)
    - How is learning (by students, teachers, parents, and the leadership) related to the institution's vision?
    - In what sense does the institution learn? (Planning and evaluation as a process of learning.)
   Notably, through engaging in the envisioned taking stock process the "institution" will begin to learn.

2. A key principle for understanding the institution is that "the relations between the parts are at least as important as the individual parts".
    - Does the budget provide sufficient support for the professional development objectives of the institution?
    - Does the curriculum take into account the way in which Judaism is practiced by its students beyond the confines of the institution?
    - Does in-service training for educators provide knowledge and skills which are appropriate to the goals of the institution?

3. The central focus of the systemic view (articulated in point #2) would be vision.

By this most consultants meant the intended "outcome" of the educational processes (i.e., the graduating student). Obviously, this coheres with the basic premise of the Goals Project.

To provide a glimpse of how the taking stock process may work, three (very) tentative questions were developed.

a. What are the goals that your institution identifies as its own? Make a list of activities associated with these goals. Put each activity underneath the goal that it supports. [This was Danny Pekarsky's suggestion.]

b. Describe those places in which your teachers tend to interact with one another. When and for how long do they congregate? What do they (typically) discuss? Who (usually) guides the discussion or sets the agenda for the meeting? Then, ask the teachers what they learn during each type of interaction. How does what they learn relate to what they teach?

c. Imagine that a stranger is visiting your institution for the day. Take this person for a walk through your institution and make a list of everything the person may see or do that would convey the perception that this is a place of Jewish learning.

For each question, there would be guidelines for analysis which would lead them (hopefully) to a systemic understanding of their institution and what needs to be improved in regard to the centrality of vision, the connectedness of parts, and the importance of everyone learning? Of course, there may be also the more straightforward questions that ask about the number of students, the building capacity, the budget, etc.

We envision that this taking stock process could assist educational institutions involved in the Goals Project in several (related) ways:

1. in overcoming their institutional mythologies; [from Danny Pekarsky]

2. in gaining an accurate systemic perception of their institutions; [In my readings on organization change, I have found that most authors find the development of a systemic view to be of equal importance to developing vision as a foundation for engaging in successful change.]

3. in acquiring a sense of alternative possibilities;

4. in obtaining knowledge about their institutions and their communities that will be needed to engage successfully in observable and sustained change:
   a. base-line data;
   b. knowledge of available resources (i.e., financial, physical and personnel);
   c. knowledge of limiting conditions in the institution and community;

5. nurturing a dynamic tension between what is and what ought to be.

In sum, the taking stock process would not only provide useful information. It is envisioned as a tool of mobilization. Perhaps, one of the best ways of getting people to see the importance of vision is to ask them to take stock of their own institutional visions and how the practices of their institution relate (or do not relate) to their visions.