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Miscellaneous. Correspondence, notes, and reports,
November 1994-May 1995.

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From: EUNICE:"74104.3335@compuserve.com" 23-NOV-1994 11:21:47.64
To: Adam Gamoran <gamoran>
CC: Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>
Subj: on the Educators Survey Module

Adam & Ellen,

After the GA, I had a couple of thoughts on the development of the Educators Survey Module. As we discussed briefly, there are two ways we could go with this (or someplace in the middle of them).

Option 1 (minimal) -

Provide the questionnaire and a codebook covering only those new variables which we compute from the questionnaire variables (i.e., JSMAJOR, JSFORE13, TRAIN).

Option 2 (maximum) -

Provide the questionnaire with a complete codebook covering all variables, including alternative codings of certain variables like FULLIMER. In addition, we could offer a complete SPSS program already set up to receive the questionnaire data (perhaps at a lower cost than they could purchase themselves). Finally, a guide for analyzing the data and writing a report.

There are (at least) three issues to consider:

1. ability of communities (especially mid-size and smaller ones) to use the module;
2. CIJE's interest in being a repository for this data, in order to provide an enhanced national view;
3. personnel resources to implement and support the process.

Issue #1: In order for the communities to be able to use the module, I believe it is always best to spoon-feed it to them. In other words, to provide a step-by-step guide (WITH ALTERNATIVES) that any Federation planner (or almost any) could follow from start to finish. REMEMBER: One consistent problem with the Lead Community process has been that they (the Lead Communities) can't make it to the next step without our assistance. We don't want to provide a module that people find too difficult to employ as this will not look favorably upon CIJE, and would end up involving us in the communities more than we would want to be. Moreover, the one advantage we may have over JESNA (i.e., their new Planning Guide) is that in focusing only on the Personnel issue in the Continuity agenda, we can provide more focused, user-friendly materials.

Issue #2: If we want to be able to incorporate the data collected by other communities into our 3 community set (Annette's idea), then we had better make sure that they give it to us in a manner that requires NO (or minimal) additional work on our part (later on). We may choose not to be a repository for national data. Yet, we may either want to keep this option open or make it easier for some other institution to do so.

Issue #3: Option #2 (maximum) requires more work on our part now. However, the more complete the guide is, I believe the less work we will need to do down-the-line. I think this is true whether or not communities hire outside consultants to do the data collection & analysis. Moreover, by suggesting that they use a CIJE-designed SPSS program, this will not only decrease the time we would need to spend incorporating their data into a national repository, it would also simplify any consulting we would need to do with the communities in teaching them how to use the module.

Thus, all-in-all, I'm starting to think that the best way to go is
someplace close to Option #2. As they say, a ounce of prevention is worth
a pound of cure.

Something else to consider - taking these issue to their logical next
step, CIJE should consider developing modules for communities to map
current programmatic resources (of programs involved in upgrading
personnel) and to develop PAPs (which I think we are beginning to do?).

Well, those are my thoughts on this issue. Hope they are useful in moving
the discussion along.

Both of you have a wonderful Thanksgiving!
Bill



February 9, 1995

To: Alan
From: Adam and Ellen
CC: Annette, Steve H., Bill
Re: MEF advisory meeting of 2/9/95

I'd like to sum up what I see as the outcomes of today's meeting of the MEF advisory committee. As a way of organizing my thoughts, I've listed the outcomes in terms of the seven "products" in our current work plan. Closure was not reached on any decisions relating to modifications of the work plan, but a number of important issues were fruitfully raised and discussed.

TASKS THAT ARE REASONABLY CLEAR

(1) Paper on "Teachers in Jewish Schools," based on data from the 3 communities covering the topics of work conditions (hours, stability, salaries, benefits), background and training, and careers. Coming into the meeting Ellen and I had substantial doubts as to whether this paper was still warranted. Comments from the staff convinced us it was needed, to show the broad range of information that can be learned from the survey data. We will write the paper following the template of the papers we wrote for the 3 communities. Deadline: August? (It won't take that long to do, but it's not our top priority.)

(3) Report on educational leaders: On this item I think there's clarity -- we should write a report on the characteristics of educational leaders in the 3 communities, and each Lead Community will get a brief report on their results (not broken down by setting. Deadline: April?

(4) Research papers on teacher power and on professional growth: Just as a reminder, here's how these were described in our work plan:

Our interview studies contain important insights on these topics, but at present they are available only in community-specific reports. During 1995, we will commission research papers on these two topics, based on the interview materials. We propose to disseminate them through a new series of "CIJE Discussion Papers." In addition, they will

be submitted for publication in journals, after review by the MEF advisory board.

I think we should go ahead with this. The cost to us is not that great (\$10,000, plus our time in critiquing drafts), and the potential payoff is high. The papers will be good. Please advise. Possible deadline: June.

TASKS THAT ARE HIGHLY AMBIGUOUS

(2) Additional policy briefs: Possible topics that seemed of greatest interest were educational leaders, and salary and benefits. Despite the high levels of interest, substantial ambiguities remain. Most important, does CIJE want to devote the time and resources needed to edit, produce, and disseminate more policy briefs? Second, will CIJE implementation staff be prepared to provide policy recommendations based on the research results? The answer to this is probably yes on the topic of leaders, but possibly no on the topic of salary and benefits.

Clearly, a brief on salary and benefits would make the biggest splash. A brief on leaders could provide CIJE with an opportunity to disseminate a plan of action for professional development of educational leaders. Probably what we should do is prepare the report on leaders (item 3 above), and then decide together whether we want a policy brief on that topic and if so, what issues to highlight in the brief (e.g., background and training of educational leaders? comparisons to teachers?).

(5) Monitoring the emergence and implementation of Personnel Action Plans and "vision-driven institutions" in communities: I did not understand what our advisory committee asking for. Perhaps a longer conversation would have allowed greater clarity. Were our advisors simply reiterating the decision we made last August, to obtain a sense of the state of these initiatives through a brief series of interviews? Were they asking CIJE implementors to provide us with a list of indicators (e.g., workshops offered or attended, number of educators studying for an MA degree, etc.) which we would then monitor? I'm just not sure. This needs much greater clarity if we are to attempt something useful.

Much of the discussion sounded like a request to return to the sort of intensive qualitative monitoring that we just abandoned, but I'm sure that's not what was intended. Another interpretation is that we have finished monitoring the Lead Community PROCESS, and now it is time to begin monitoring Lead Community OUTCOMES. If this is intended, we'll need to discuss what kind of outcomes should be examined.

This area of our work also includes monitoring the progress of the Goals Project in the Lead Communities. Although we discussed this topic, we are not sure what sort of work is called for. What is the role of MEF in the Goals Project?

One issue that we did not have a chance to mention is that part of your desire to reduce the staff of the MEF project was to reduce the supervisory and administrative burden on Ellen and me, so we could focus more attention on building a research capacity. That should be kept in mind, and the whole issue of the research capacity needs much further discussion.

(6) Module for studying educators in a Jewish community: We discussed three possible approaches for the module: (a) Give the instrumentation to communities, and they're on their own to use it; (b) Work with some national agency e.g. JESNA or CUNY to be the centralized location for providing the surveys and analyzing the results; (c) Create a comprehensive package from start to finish which we or some other agency would help communities carry out themselves.

In the course of our conversation we reached consensus on a few issues. We prefer the second model but aren't sure who's out there to serve as the national agency. We would want the survey to be basically standardized but with some flexibility for a modest amount of local tailoring. We would like to create a data bank to collect the data from all the communities that carry out educator surveys. Overall, however, we aren't sure how to get this done, and we need to think more about it. Deadline: April - this is our top priority.

(7) Leading Indicators: We did not make any progress in this area. It is still on the table, but what the indicators might be and where they might be obtained remains to be seen.

List of Products for 1995

1. Research Paper: "Teachers in Jewish Schools" (analysis of survey data from three communities).
2. Research Brief: At least one new research brief on teachers, possibly more than one, depending on how they are received.
3. Reports on the characteristics of educational leaders: One for each community, and one on all three communities.
4. Research Papers: One on teacher power, another on the quality of in-service experiences.
5. Reports on development and implementation of Personnel Action Plans and the development of "vision-driven institutions" -- one report for each community during 1995.
6. Module for "Studying Educators in a Jewish Community."
7. Proposal for collecting data on Leading Indicators, in response to the decisions of the CIJE implementation staff. Depending on the nature of the Indicators and the availability of resources, we may collect a round of Indicator data during 1995.

MEF Advisory Committee Meeting: Cambridge
February 9, 1995, 9:00am - 4:30pm

Agenda

I. Developing a Module for the Study of Jewish Personnel

- A. Preparing the Module for Use in Communities: Draft of Module
- B. Data Collection: How do we assure quality? What is CIJE's role? Should an outside group be involved?
- C. Data Analysis: Who will analyze data? Private consulting group? A university, researched-based institute (CUNY)? Bill? How to ensure quality, comparative bases, and opportunities for secondary analyses from other researchers?
- D. What is the dissemination plan for the module itself?
- E. How can the data be disseminated and accessed for "public" use?
- F. How can findings be disseminated and reported? In individual communities? Beyond individual communities? Reports of secondary analyses?

II. Review of experience of the Policy Brief: What went well, what did not go well, where are we in the dissemination plan, etc?

III. Questions about the 1995 Work Plan in light of previous discussion (note that a report on educational leaders is in progress):

- A. Should we go ahead with additional policy briefs? If so, what topics are highest priority?
- B. Do we still want a single report on personnel that incorporates the various topics (background and training, salaries and benefits, careers) across communities?
- C. Evaluation in Lead Communities and elsewhere: Leading Indicators?
- D. Research papers and other issues

**Issues for Consideration in the Preparation of the Educator
Survey Module**

MEF ADVISORY COMMITTEE- 2/9/95

We assume there are four important objectives to consider in preparing the educator survey module for use:

- 1) feasibility of use
- 2) quality control
- 3) creating a repository for data/comparability of data
- 4) accessibility of data for wider use

Focusing on these objectives we should consider a number of options:

1) Communities on Their Own

The instrument is prepared with guidelines for use. These materials are available to anyone who wants them. Communities are on their own to find staff to carry out whatever components of the module they wish to use. Private consultants may be available to carry out this work.

Advantage: Minimal cost to CIJE both financial and in terms of time. Flexibility to the communities to use the module as best meets their needs.

Disadvantage: CIJE has little control over the process.

2) External National Agency Model

In this option, the communities would implement the module in terms of data collection and would forward the collected data to a central "address" such as JESNA or CUNY. This national agency would then analyze the data, write the report, and house the data. The national agency would also be responsible for fielding questions during the data collection stage.

Advantages: The national agency would quickly become experts in this type of work. This could enhance quality control, as well as ensure that the data is compiled in a comparable manner and housed in a central location. This could also enhance the distribution of reports from a more national perspective. Furthermore, this may allow for greater "objectivity" in the process as it is removed from community pressures. Often information coming from outsiders are viewed more favorable with

higher status and expertise. There would have to be one major training session by CIJE for the national agency. The national agency could be responsible for periodic reports of cross-community reports as well as advertising the availability of the data for secondary use for dissertations, grant proposals, and other research projects.

Disadvantages: This is a not a "capacity building" model. That is, the communities are not learning to use this type of methodology as an option in their ongoing planning. In addition, it would be important to address whether the communities could modify the instrument to suit their needs and financial/personnel resources? The process and product could be viewed by communities as highly centralized and constraining.

In this model the responsibility on the national agency is very great. Hence the choice of such an agency would be of central concern and their mandate would have to be clear. For example, would the national agency be able to modify the instrument?

Other issues for consideration:

- a) Cost
- b) Nature of the relationship between the communities and the national agency--such as, level of interaction, time spent with each community, etc.

3) Comprehensive Package Model

In the comprehensive package model, communities can collect/analyze/write reports independently. Accompanying the module (the actual questionnaire/interview instruments and instructions) will be a complete codebook covering all variables, including alternative codings of certain variables. In addition, we would offer a complete SPSS program already set up to receive the questionnaire data. Finally, a guide for analyzing the data and writing a report would be included.

During the data collection stage there will be a "hotline" number where communities can call for clarification and help concerning sampling, questionnaire distribution, data analysis, etc (although the module will have detailed directions).

Communities would be required to provide the raw data and the completed reports to CIJE/or another national agency.

The advantages of this comprehensive approach is: Communities that want to undertake data analysis themselves will have a complete set of materials to do so. This will also ensure greater comparability of data and quality. This will build the capacity in communities to engage in the self-study process. This process may also help facilitate the development of

Personnel Action Plans by helping communities participate in the process "from data to Personnel Action Plans to evaluating change".

Disadvantage: It is a great deal of work for us to get this type of package prepared. Is it realistic to think that if communities have this comprehensive material they will a) want to use it, and b) know how to use it? This does not really address secondary data analysis, report writing beyond individual communities and issues of the wider research agenda.

Other issues for consideration:

- a) Cost to communities (both the cost of the module itself and manpower hours/expertise to implement data analysis, and report writing).
- b) The need for periodic training seminars for communities to implement and use the complete module package,
- c) Requirements of communities to submit data to a central repository
- d) Who will be responsible for the "hotline" to answer questions?
- e) Who will be responsible for collecting raw data, compiling it, advertising its availability, at the national level?.



ME# mts 2/9/95

I B, C

- consensus on centralized expense
- qs on what capacity needed
- dep on what's involved. - - (Ellen)

Inbar - could see model as dynamic - can make a few changes

- some flexibility
- in instruction & analysis
- probl of complexity & capacity
- it can't be flexible, is it all worthwhile???
- need to go thru the parameters & figure out costs for various scenarios
- "tailoring" analogy - tailor does ^{small} ~~little~~ proportion of overall tailoring, but makes each customer feel that it's custom made

II. Pol first - dissem now!
need better time frame!

III A. Nessa - sal/benef - ^{for next} GA SF - principals

B. prob yes ~~yes~~

C. ~~to be~~ Annette - is it time to shift back to eval? - where do we want to be? what measures?

Annette 1. - find stdz measures, repeated over time, indic state of Fed
2. - specifics of personnel ac plan

III C. cont. n . . .

Daban - characs of indic

1. refer to many de cs ^{if meas right}
2. can be derived from various notes
- need rel. ability

SF - indic, not key elem of eval, but leave open

- es how many contin post-ban m
- how many have Isr experience
- teachers rec m-service, how long
- ch compos it of + force

- in volunt of top leadership
- or what else would CITE like to meas
- what would they like -s to measure

Annette - es Pers Ac Plan - ask what would be successful, implm?

- es Inst. like etc.
- in Balt add ~~part~~ - it's have
- assessm for m-service, etc.

ADH - added to our agenda

- has CITE emerged to next stage, where see path to bldg mot, + say where are we w/r/t outcomes
- need paper re: indicators for another mty
- MFF advis can react

Comments on community update

Inbar

- AHI is failure - when face of to it?

- others - problems

- who is responsible for transforming this into policy & decision document

SF - this is role of adv. com. committee

- AG, EG, SF, MI, AH, JC

ADH - can't wait til August to respond

ADH - from now on, MFF Adv. mtgs are 2 days

- 1 day on where CITE is as seen, & evaluated

- 2nd day is on MFF Work Plan

- may push us towards new data collec

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progress of
To study / pers ac p/n

① interview fed exec
not continuity
lay champion
lay president of Federal

② list of all ed leaders
rabbi's continuity commission members
other fed committee members
— purposeful select of 2-3 in each category (or more?)
+ random sample for interviews

③ interview CJTF staff

what are chars of good pers ac p/n?
— scope, content, quality

to what extent are there shared v.s. ms among lay, fed, not ed, leadership

- 1 ~~PT~~ Force rpt
- 2 ~~el~~ bts
- 3 ed Goals
- 4 res papers
- 5 PAc Goals
module
- 6
- 7 LIS

add for Steve's
agenda
Ellen's memo
work plan projects

From: EUNICE::"74104.3335@compuserve.com" 27-FEB-1995 17:37:42.31
To: Gail Dorph <73321.1217@compuserve.com>
CC: Adam Gamoran <gamoran>, Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>,
"Alan Hoffmann (in US)" <73321.1220@compuserve.com>
Subj: Some notes on current events in Atlanta

Gail,

Thought you may like a brief update on current happenings in Atlanta regarding their movement toward development of PAPs.

Steve and Janice have been working with the three professional councils to have them form proposed Personnel Action Plans. Currently, both the Educational Directors Council and the Day School Council are planning for meetings in which the first substantial steps toward developing PAP's will take place. [Nothing yet happening with the Pre-school Council.]

EDC: On 2/23, some members of the Educational Directors Council (Grossman, Grossman, Colbert, Barrington, Lazar, and Weinroth), along with Rabbi Davids (Rabbis Sugarman and Goodman were invited but didn't show) met with Steve and Janice to plan for a March 23rd Professional Development meeting.

The meeting began with the concept of addressing minimal competency standards for educators (at the March 23rd meeting). However, it quickly moved (mainly due to Rabbi Davids) toward addressing and reconsidering their institutional visions, as well as working toward a shared communal vision of what our supplementary schools should be doing. [Steve and Janice had planned this as a future step.] Educators' professional development would be discussed in light of any shared visions which are developed. It was felt that there is currently a moment of opportunity in which radical reconfiguring of Atlanta's supplementary school (e.g., a community supplementary school) may be possible.

It was decided that at the upcoming March 23rd meeting, educational directors and their Rabbis will meet to discuss vision, and any related issues that may arise (e.g., adult education, professional training, etc.). Prior to the meeting, CJC/JES will send out a letter to the Rabbis and educational directors asking them to describe (together) the current visions of their schools. [The exact form of this question was not decided.]

DSC: The Day School Council also met on 2/23.

At this meeting, the 4 schools (Torah Day School has not been attending) continued to share informally what they do for in-service training. Last month, Epstein and Hebrew Academy went. This month Davis and Yeshiva spoke.

Also, at this meeting they continued planning for a meeting of all Judaic studies educators in the day schools. This meeting is scheduled to take place in the afternoon of April 3rd. At this meeting, educators will discuss in small mixed-school groups and in the large group:

1. What do you see as your own professional development needs?
2. What do you see as your institution's needs with respect to professional development?

Then, they will move to consider issues of obstacles to meeting these needs, possible solutions, and available resources.

Well, that's the current events. Thanks for the note on CAJE.

See you Monday,
Bill

From: EUNICE::"GOLDRIEB@ctr.vax.Vanderbilt.Edu" 28-FEB-1995 08:41:23.86
To: 73321.1223@compuserve.com, gamoran
CC:
Subj: Your requested paragraph on Lunch meetings from NY

Research and Evaluation
Steering Committee Meeting: 2/14/95

Participants:
Esther Leah Ritz
Ellen Goldring

We reviewed the 1995 workplan for monitoring, evaluation and feedback. At present the MEF team is working on the report of educational leaders in the three Lead Communities and is completing a module for the study of educational personnel to be used by Jewish communities beyond the three Lead Communities.

Next we discussed whether MEF should begin to evaluate CIJE implementation projects, specifically the Goals Project and Personnel Action Plans. To date, MEF has documented the processes of 'organizing for action' in the three lead communities. We spoke about the complicated distinction between short term and long term indicators of evaluation. We also discussed the role of evaluation in relation to the other important strands of MEF's work: continuing the research agenda with more policy briefs and reports, and the need to embark on the study of informal education.

There will be a CIJE staff meeting on March 6 to help address these issues. After this staff meeting the agenda for the next board meeting will be addressed.

From: EUNICE::"73443.3152@compuserve.com" 16-MAR-1995 13:44:28.55
To: "Gamoran, Adam" <gamoran>
CC:
Subj: Surveys, papers, etc.

Dear Adam,

It is Thursday, 16 March and I have just returned from Seattle [mostly a family reunion]. I was not here when you phoned, which was sometime during my absence. Anyway, I am here now until the 21st when I leave for Cleveland for three days.

I think I e-mailed you re: Seattle survey; it is being administered as I write. As I noted, I expect that it is similar to what you guys are developing, but I do not know how close they are. We have separate surveys for principals and teachers, although there is considerable overlap. I am looking forward to seeing the CIJE version and will post the Seattle version to you.

As for appropriate journals, we think the following are possibilities: Religious Education [a general religious audience], Journal of Jewish Communal Service, Jewish Education, Studies in Jewish Education [Melton], and Arnie Dashevsky's journal, the name of which escapes me at the moment.

I hope we have budgeted the studies correctly. Seattle is a little lower than normal because they were the first to take a chance on us. We will be busy for at least a year if Cleveland accepts our proposal. We each also have a few smaller things going...

All for now, regards, Julie.



To: CIJE Staff

From: Bill Robinson

Re: FYI on Federation Planning and the Role of Research

As I mentioned to Adam, Ellen, and Gail, I have obtained two proposals submitted to the Atlanta Jewish Federation for a strategic planning process (on residential needs for the elderly). I think they provide two very different examples of how Federations may choose to integrate research into planning. Below, I provide a brief comparison of the two proposals as ideal types.

While I am aware as to who wrote each proposal, I thought it best to eliminate their names from the proposals (so as not to confound the what of the plan with the who). I have labelled the two proposals Option A and Option B. Option A was submitted first. The consultant who submitted Option A conducted key informant interviews and held two meetings with the Federation-created Task Force. In response to concerns expressed by member of the Task Force (associated with agencies) about the lack of meaningful participation in the process, a proposal from another consultant was requested by the Federation. This is Option B. This second proposal was accepted and the first consultant was let go. Since Option B was submitted after the planning process had begun, its first two steps are a recounting of what had already occurred.

Prior to receiving either proposal, the Federation had delineated two goals for the proposed strategic planning process:

1. To examine the needs of Atlanta's older Jewish population and their families in relation to services being provided in both the Jewish and general communities.
2. To reach consensus on a community-wide strategic plan for Federation, its beneficiary agencies, and other interested community groups.

Essentially, the first goal ("examine the needs") is a means by which to accomplish the second goal ("reach consensus on a ... plan"). The two proposals outline substantially different ways of using research (on the needs of the elderly) to achieve consensus on a plan. The following is a brief comparison of these two proposals, looking at them as "ideal types" of how (educational) research can be employed in Federation-based planning efforts. In practice, the clear boundaries between plans obviously become blurred.

OPTION A presents a top-down, circumscribed approach to reaching consensus in which research plays a marginal role. In this model, consensus is to be reached on certain "strategic choices", which themselves are derived (primarily) from the views of key (Federation and agency) Board members and community leaders. Decisions on these "strategic choices" will be informed by data obtained about the current needs of the elderly in Atlanta. Yet, this information will gathered (primarily) from three sources: already existing information on agency clients; focus groups with "target subgroups within the client population"; and the opinions (again) of the professional and lay leadership as to the needs of the elderly community. The first two sources would provide information about the current usage of services and the people using them, but would NOT be generalizable to the total Jewish elderly population of Atlanta. Thus, the type of information which would inform decisions in the planning process is limited to the opinions of those who have chosen to use the current service offerings, those who run the services, and those who run the community. The ACTUAL "needs of Atlanta's older Jewish

population and their families" are neither obtained, NOR ARE THEY EVEN VERY IMPORTANT TO THE PROCESS. Consensus on a plan is achieved through circumscribing the range of decisions to be made (i.e., the strategic choices) and circumscribing the sources of information upon which those decisions are based. Obtaining actual data on the needs and desires of the total Jewish elderly population of Atlanta may even prove detrimental to reaching consensus on a plan, to the degree that what is found to be in the interest of the elderly may not be in the interest of the lay and professional leadership of the community (as they currently see it).

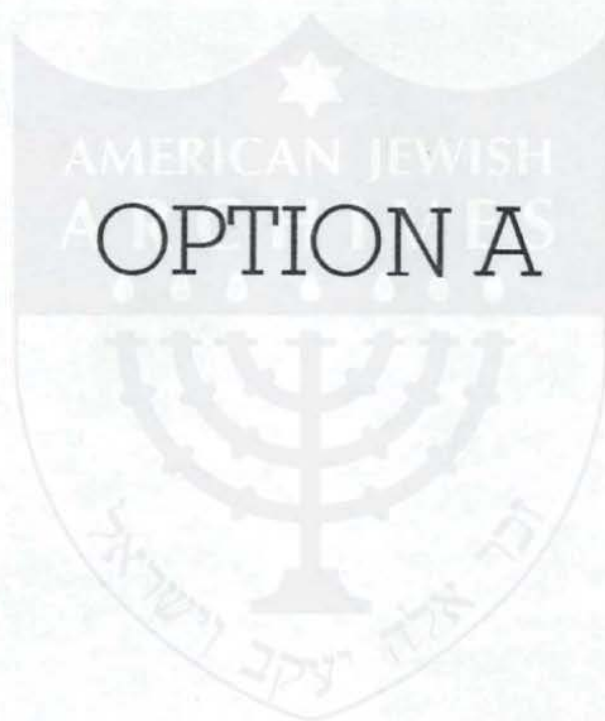
In contrast, OPTION B presents a bottom-up, open-ended approach to reaching consensus, in which research plays a central role. In Option B, consensus is reached through the community of lay and professional leadership building a shared vision of the ideal services the community could offer to its elderly. This vision is informed by the ACTUAL "perceptions of the older persons themselves", obtained through focus groups and individual interviews with a stratified, random sample of the known Jewish elderly population in Atlanta. In addition, consensus is built through critical reflection upon the agencies' own visions, through the Task Force members' developing (together) their own personal visions of "the ideal qualities of the life of a Jewish elder person", and through visits to "models of excellence" (also included in Option A).

The difference between the two approaches is stated in the Introduction to Option B:

Basing consensus on the moral legitimacy that comes from the perspectives of the older persons themselves, is more effective than basing it solely on the opinions of lay and professional leadership. However, in a bottom-up process, the views and knowledge of the agency professionals that serve the elderly are also vitally important. By engaging these professionals in reflectively studying their own agencies, planning decisions will be based on an in-depth knowledge of the service gaps and agency resources that exist within the community. The agencies will take stock of their guiding vision, amongst other things, and refine their vision through the study process.

Through engaging in the PROCESS OF RESEARCH, on the actual needs and wants of the elderly and self-reflective evaluation on their agencies, the Task Force members learn, develop a vision, and reach consensus. In Option B, the Task Force members do not just receive research data (as in Option A). They are involved substantially in doing research. As a group, they learn about their own and each others agencies, and they learn about what elderly persons value. Option B attempts to employ a "constructivist" model of learning to research and planning.

As our history with the three Lead Communities indicates, how to integrate research into planning (in a manner that facilitates consensus and action) is no easy task. I hope that these two examples can spur our thoughts and assist us as we work with other communities who choose to employ the Module for The CIE Study of Educators and any future research tools that are developed. Perhaps, the envisioned Evaluation Institute could provide a unique and powerful forum, in which local evaluation consultants, Federation lay and professionals, and national educational leaders come together to learn (together) about the best ways of doing evaluation research on Jewish education in the context of Federation-based planning efforts.



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option A

PURPOSE

The purpose of this project is to examine the needs of Atlanta's older Jewish population and their families and to develop a community-wide Strategic Plan for Federation and its agencies, articulating community-wide priorities, goals and agency roles in response to those needs

THE CONTEXT: AGING IN AMERICA

- It is no secret that the United States is an increasingly aging society; the Jewish community is older, and is aging more rapidly than the society at large. The fastest growing age group is among those over 80 years of age. Based on the 1984 study, the Atlanta Jewish community will include more than 10,000 older persons in the year 2,000.
- It is wrong to lump all older persons together as if they are a homogeneous group. They are as diverse -- in interests, background, education, living arrangements -- as any other group of Americans.
- Older Americans are different in that they tend to have lower incomes than other Americans.
- Eighty percent to ninety percent of American Jews over 70 are independent and can basically take care of themselves.
- The evidence is overwhelming that most older persons wish to remain in their own homes as long as possible. Institutional living arrangements -- in nursing homes -- are increasingly seen as the choice of last resort for most people.
- Even with the changes in the American family, children play an important role in the care of their older parents. In particular, daughters and daughters-in-law are deeply involved with the care of an elderly parent.
- The biblical commandment -- honor thy father and mother -- was interpreted through the ages NOT as a source for parental discipline of young children, but as an obligation for mature children to support their elderly parents.
- Thus, both from the point of view of today's reality and as well as Jewish tradition, the family is the first line of defense in dealing with the stresses and strains of aging; the community is the second line of defense. Communities need to find new ways to support families involved in care-giving; families may need to do more to share in the costs of communal services to older persons.

- With even the nuclear family scattered to the winds and with divorce and re-marriage common-place, second and third families leave loyalties and responsibility diffuse and confused.
- The long-cherished American value of saving for one's old age is reduced to ashes by a system that requires one to spend down to receive public funds to cover the astronomical costs of nursing care.

The current system of service for older Americans and their care-giving families is chaotic in the division of responsibility for funding and service. The individual, family, Jewish community, community at large, and government are involved in meeting the increasingly expensive burden of support in later years. Who pays for what and when?

- The fiscal pressures on government and the escalating costs of long term care have put new pressure on communities, institutions and individuals. Facilities and programs geared predominantly to serving low-income and frail populations can no longer survive financially. New approaches such as long-term care insurance need to be considered.

The implications of these combined trends are critical for future planning. First, it means that program development must be sensitive to the spectrum of Jewish older persons, responsive to their diverse needs and individual preferences. It means that to continue to be able to provide subsidized care to the most needy, agencies must be able to attract higher income clients that are able and willing to pay for services. Agencies will also need to develop and tap new sources of revenue. The concept of "the primary client" is being expanded to include relatives that have assumed the role of caregiver but who themselves need support to deal with emotional and practical demands, often at long distance. In sum, it means that in taking a more active and market-oriented approach to serving the Jewish aging, agencies will require better information about client needs and tastes, "friendlier front doors" that make services easier to find, sort out, coordinate and use, and innovative financing strategies.

GENERAL APPROACH

Preparing a Strategic Plan is an effective way to collect and analyze useful information; to discuss and resolve basic issues; to reach agreement on where agencies should be going; and to position them for moving forward.

The Atlanta Jewish community faces important challenges in planning to meet the needs of its elders and their families; it also is presented with an unusual opportunity.

The Strategic Planning Committee oversees the preparation of a community-wide needs assessment, identifying current and projected service gaps, areas of excess capacity or anticipated declining need (if any), and information on preferences of existing clients and prospective service populations.

The Committee uses the community needs assessment as a basis for a Strategic Plan that identifies community-wide service priorities, establishes broad goals, and defines the primary roles of the major aging-related agencies. While some competition may be desirable, reflecting differences in location, emphasis, ambience and flavor, the overall objective is to minimize duplication. Maximizing the impact of scarce communal dollars ultimately means more resources are available to all participants in the system. The community plan should be a vehicle for interagency co-ordination, building on the strengths of each organization. The plan should include specific recommendations for joint activities and mechanisms for on-going inter-agency coordination.

In our experience, the best strategic planning occurs where there is close, on-going interaction among members of the Strategic Planning Committee, the appropriate Executives, and The strategic plan drafted by the consulting team should be the product of that interaction.

WORK PLAN

1.0 ORIENTATION AND RECONNAISSANCE

The work begins with the organization of the Strategic Planning Committee, review of the project purpose and method, the introduction of the project to the community and the review of basic background materials by the project team.

2.0 POLICY ISSUES AND RESEARCH QUESTIONS

In the second step, the Committee and the project team will work together to define the important policy issues that the Plan should resolve and the related questions that the research should answer. The project team will also interview "key informants" in the community to increase our understanding of policy issues, the culture of the community, and finally, these interviews are an important source of information about critical issues or choices facing the community. These interviews will provide valuable information for each of the next two steps.

3.0 NEEDS ASSESSMENT AND MARKET ANALYSIS

The third step includes a comprehensive assessment of current and anticipated needs for Jewish communal service to older persons in Atlanta. Perspectives of experts and leadership on needs in the community, the strengths and weaknesses of existing services and programs, will be merged with identification of important trends in government and the voluntary sector in Atlanta and the state affecting the delivery of care to older persons. Findings from internal analyses of each agency with an analysis of the external environment. We will gather and analyze existing data, studies and material; interview key agency personnel and experts in the field; make site visits; conduct focus groups, and carry out limited field surveys. The work will build around two key questions regarding the needs for services in the Atlanta Jewish community:

- Whom does the community and its agencies serve now, and how well?
- Whom could the community serve (unmet needs/gaps in service)?

3.1 ANALYZE POPULATION

Using information on existing clients and such other population data as exists or can be quickly assembled, we estimate the geography, income level, family status, and degree of independence of older Jewish persons in the greater Atlanta area.

3.2 ANALYZE THE COMMUNITY'S SERVICES

Using primarily information already available or easily compiled, a profile of the services of the community will be developed. This will give Committee members a common base of information about the services provided by the community and its agencies. We will look at the mix of clients and services, the resource base, measures of quality, and physical plant characteristics.

3.3 ANALYZE SERVICE USE AND UNMET NEEDS

The information in 2.1 and 2.2 together with other qualitative and quantitative information (e.g. waiting list information) would be used to derive an estimate of the amount and type of needs that are being met and that are not being met by the Jewish communal network.

3.4 IDENTIFY OTHER RESOURCES IN THE COMMUNITY

Key informants will have been asked (step 2.0) to help identify other resources available in the general community -- including public, private and voluntary services and facilities. In particular, it will be important to pinpoint what types of needs not being met by Jewish-sponsored agencies are being met by other providers, and what needs appear to be unserved by anyone.

3.5 LOCATE GAPS IN SERVICE: WHERE ARE THE GREATEST UNMET NEEDS?

Taking into account whatever we can learn about other resources, an estimate will be made of the areas of greatest unmet need. Opinions will be probed among both providers and clients to learn more about the variables affecting utilization of different resources and levels of client satisfaction.

A series of approximately 20 focus groups will be conducted to gain insights into the market preferences of target subgroups within the client population, specifically older persons of various income levels, housing situations and degree of frailty, and family-member caregivers. We intend to train local focus group facilitators to conduct the various groups, and will work with members of the Strategic Planning Committee to identify potential facilitators (e.g., from Young Leadership).

4.0 STRATEGIC CHOICES

In charting future directions, the Atlanta Jewish community faces a number of important policy and program cross-roads: i.e., strategic choices. Key Board members and community leaders will have been interviewed to elicit their views of the important choices facing the community (Step 2.0 above). This information and the information about current needs should help the Committee first, to define critical choices, and then to consider various options for the future.

In our experience, there are three levels of strategic choice:

- 4.1 The most fundamental critical choices pertain to vision. For example: What is the role of the organized Jewish community in providing care to dependent older persons: "safety net" or primary provider?
- 4.2 A second level of strategic choices relate to program: client groups, service mix, location and facilities. For example, should physical plant investment favor a campus model, the creation of a new center, or greater decentralization and satellite programs?
- 4.3 A third level of strategic choice relates to resources: revenue and expenditure relationships; financing; board and staff development; interagency relationships. For example, should the Jewish community take a leading role in the advancement of long-term care insurance or leave it to the general community? What are capital needs for proposed facilities and what are the best funding models?

5.0 MODELS OF EXCELLENCE

Once strategic choices have been laid out and possible directions agreed upon, will recommend that members of the Strategic Planning Committee visit programs and/or facilities that are known to be models of excellence in their field. This will allow Committee members to better visualize and fine-tune the services/facilities that are being considered, and allow Atlanta leadership to learn from the experience of others, in order to replicate success and not failure.

6.0 VISION

The Committee, working with needs to define its vision of the system for supporting older persons in Atlanta in the future, include a broad division of responsibility and areas of cooperation on an inter-agency basis.

7.0 RECOMMENDATIONS

In this phase of work, the Program and Resource level strategic choices will be resolved, leading to the development of action-oriented recommendations.

The recommendations are likely to deal with such subjects as: priorities for service expansion and development (as well as areas that should be contracted); opportunities for interagency coordination that would both strengthen individual agencies and improve service delivery; marketing and income generation; service location(s) and capital investments; board and staff development; mechanisms to facilitate on-going inter-agency cooperation.

During this phase, the consulting team will work closely with the Strategic Planning Committees and agency executives to develop and test proposals. Preliminary recommendations will be prepared and presented for discussion, review and revision.

8.0 FINAL REPORT

The Final Report will include: the results of the needs assessment; the communal mission in serving older persons; strategic choices; the role of each agency in the network; the policies and programs that should be undertaken in the next three to five years. The final chapter will include an implementation plan laying out specific steps, responsibilities and time lines.

PROJECT WORK SCHEDULE

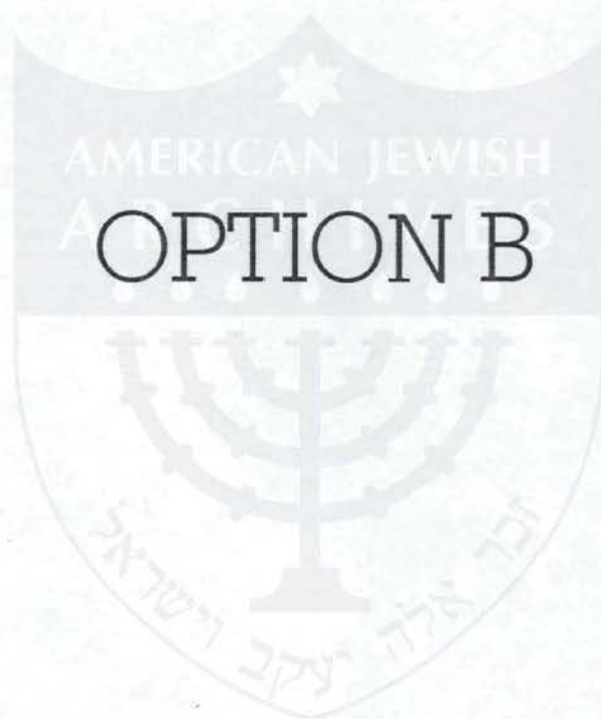
START DATE: February 1, 1995

END DATE: Oct 31, 1995

MONTHS

Work Steps	1	2	3	4	5	6	7	8	9	10
1.0 Orientation										
2.0 Issues and Research Questions										
3.0 Needs Assessment										
4.0 Strategic Choices										
5.0 Models of Excellence										
6.0 & 7.0 Vision & Recommendations										
8.0 Final Report										

Option A



INTRODUCTION

The Strategic Planning Study for Jewish Older Persons has two goals:

To examine the needs of Atlanta's older Jewish population and their families in relation to services being provided in both the Jewish and general communities; and

To reach consensus on a community-wide strategic plan for Federation, its beneficiary agencies, and other interested community groups.

Specific questions that the planning process will answer include:

- * What are the Jewish community's obligations to the elderly?
- * Now and in the future, who are the Jewish elderly and how many are there?
- * What are the human service needs and wants of the Jewish elderly?
- * How well are we satisfying those needs and wants, and how well are our competitors meeting those needs and wants?
- * What reconfiguration of services would make sense from a marketing perspective?
- * What reconfiguration of services would make sense in terms of community resources?
- * What challenges are we likely to find in the future?
- * How resilient and versatile are our institutions, in terms of meeting changes?
- * What level of community coordination is possible?

The proposed community planning and study process is guided by what may best be described as a "bottom-up" philosophy. In a bottom-up process, research is not solely a means of gathering data. Research alters perceptions, helps develop communal vision, and mobilizes the lay and professional community in pursuit of a common good.

The bottom up research process emphasizes exploring the needs and desires of the population being served. Through the data collected, the voices, values, and concerns of the elderly are heard by the community. These voices become a fundamental part of the planning process, in that:

- * They provide a vehicle by which the individual service oriented perspectives of the agencies can be transcended in building a community vision of Jewish services for the elderly.
- * They provide legitimacy for the recommendations of the task force, if the planning decisions are rooted firmly in the informants' perspectives.

A bottom-up philosophy recognizes that older persons, and their families, are the real experts about their lives.

Basing consensus on the moral legitimacy that comes from the perspectives of the older persons themselves, is more effective than basing it solely on the opinions of lay and professional leadership. However, in a bottom-up process, the views and knowledge of the agency professionals that serve the elderly are also vitally important. By engaging these professionals in reflectively studying their own agencies, planning decisions will be based on an in-depth knowledge of the service gaps and agency resources that exist within the community. The agencies will take stock of their guiding vision, amongst other things, and refine their vision through the study process.

Coupled with visits to models of excellence, an understanding of the regulatory and financial environment, and an exploration of Jewish values, the bottom-up research process will facilitate the development of a communal vision of Jewish service to the elderly. While the agency representatives may all come to the planning process with a well defined but generally limited vision of what service provision can and should be, these views may change over time through direct contact with the voices of their clientele and models of excellent service around the country.

Finally, bottom-up research is congruent with thinking at the cutting edge of planning for older persons, which emphasizes individual choice, empowerment, and community inclusion. According to the latest thinking, older people should not be grouped into age or diagnostic categories for the purpose of placing them in the appropriate box in the service continuum. Any planning should come from an individual, rather than an agency perspective.

The work plan provides an integrated approach to planning, in which the steps of the study process correspond to Task Force activities. The research process itself is thorough, in that it explores every facet of the issue. It is rigorous, to the extent allowed by time constraints and financial resources, in that a variety of sound methods are used in combination to validate the data collected. Finally, the process is fair to the all parties with interest in the study outcome, because it:

- * Allows the voices of older people to inform planning,
- * Provides a forum for the agencies to participate in the study process, and develop community vision and recommendations, and

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* Takes into account the economic factors impinging on service provision at a community level.

The process will help to create a learning community, in which the members can become engaged in the study process, and expand their knowledge and vision about what can and should be done to meet the needs of Jewish older people. The first two steps of the study process have already been undertaken at this writing, and must be considered as given in the work plan, which affects the proposed subsequent process. A Work Plan (which outlines specific study methods), a Project Work Schedule, and Modules for Task Force Meetings follow.



WORK PLAN

1.0 ORIENTATION TO THE STUDY PROCESS

The orientation phase of the study process included several different activities on the part of the researchers and the Task Force.

gained expertise in the field of aging, including needs of the elderly, models of service provision, and trends in the aging movement through a literature review, conference/workshop participation, and interviews with key informants in the Jewish community. The key informant interviews with Executive Directors and service providers, supplemented with site visits to the agencies, provided valuable information on the perceived needs of Jewish older persons, the funding and regulatory climate, and the culture and politics of Jewish aging services in Atlanta, which are used to develop this work plan and data collection procedures.

was introduced to the Task Force and reviewed the project purpose and method with the group. They conducted key informant interviews with the Executive Directors and Presidents of the agencies, and with Federation officers, and visited some community programs.

2.0 POLICY ISSUES AND RESEARCH QUESTIONS

Task Force members were briefly surveyed to determine their view of the three most important questions to be answered by the study. organized the group responses, which were subsumed by the nine questions guiding the study, as above.

presented their work plan to the Task Force. They drafted policy issues and research questions, which basically restated the guiding questions, supplemented with some language from the Task Force responses. The draft was presented to the group (see attachment).

The Task Force accepted the work plan, and the policy issues and research questions as presented, with little participation or engagement in the process. However, as a Task Force member commented in his or her response:

There needs to be more than a cordial agreement among interested parties and a desire to do good if the strategic plan is to have any meaningful impact.

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The subsequent steps in the proposed work plan may help to move the study along by engaging the parties in the process.

3.0 TAKING STOCK

In order to determine the ability of the community to meet the needs of Jewish older persons, an assessment of the current continuum of service must be undertaken. This taking stock process includes profiles of the Jewish communal agencies serving the elderly, as well as a survey of the non-Jewish agencies serving large numbers of Jewish people.

3.1 AGENCY PROFILES

The Jewish communal agencies serving the elderly will be studied in a process that will both provide organizational information and engage the agency representatives in the planning study. Separate group interviews will be conducted with representatives of each of the six agencies (AJCC, JFS, JVS, Jewish Tower, Louis Kahn Group Home, William Breman Jewish Home). The group interview will include each of the agency's key lay person, Executive Director, and direct service professional. Participants will be asked to come to the interview prepared with basic factual information to turn over to the interviewer. The interview process will then focus on more reflective questions, as related to agency vision, mission, and goals, methods of service provision, strengths and weaknesses, plans for the future, and relationships with other service providers.

Information collected in the Agency Profiles will include:

- * Background Information
- * Population Served (eligibility, catchment, income)
- * Fees for Service/Methods of Payment
- * Services Provided
- * Agency Capacity
- * Organizational Structure
- * Staffing
- * Financial Profile/Resource Base
- * Physical Plant
- * Agency Vision, Mission, Goals, Objectives, Strengths/Weaknesses
- * Client Profiles
- * Relationships to Other Community Resources

The Agency Profiles are intended to obtain information on the agencies' ability to provide existing services and their potential for filling identified service gaps. Assessing the agencies' vision, however

limited, will provide baseline data that will be useful in affecting change over time.

The Task Force Module, "Taking Stock/Building a Community Vision", will summarize the procedures of, and general themes of the information gathered via, the Agency Profiles. Task Force members will share information they learned about themselves, and their agency visions, as a result of engaging in the Profile process. Another visioning exercise will focus on more personal views of the ideal qualities of the life of a Jewish older person. This will begin to move the group away from their agency role, and serve as a bridge to the next phase of the study.

3.2 ASSESS OTHER COMMUNITY RESOURCES

As part of the Agency Profiles, the agency representatives will be asked to identify other non-Jewish organizations that are currently serving large numbers of Jewish people. These organizations may be public or private, for profit or not-for-profit. Other agencies providing services to older persons will be identified using the United Way Help Book. The targeted agencies will be surveyed for basic information to assess their ability to work with and/or serve the Jewish community. These agencies will not participate in an extensive profiling process.

4.0 MARKET ANALYSIS

The Market Analysis is comprised of three components. First, an estimate of the location and number of the Jewish older population will be obtained. Second, a needs assessment will focus on the demographic characteristics, level of health, type of assistance needed, residential and service needs and preferences, and patterns of service use and satisfaction of the known Jewish community. Finally, the identified needs will be matched with current service delivery system identified in "Taking Stock", to determine true gaps in service.

The Task Force will be involved in the Market Analysis in three ways. First, the Task Force Module, "Data Collection Methods", will be devoted to an overview of the data collection philosophy, procedures, and instruments. Second, members of the Task Force will be instrumental in recruiting volunteers to assist in data collection. Finally, agency representatives can facilitate the development of the sampling frame through provision of client and waiting lists.

4.1 ESTIMATES OF THE LOCATION AND NUMBER OF THE POPULATION

Several methods will be used to estimate the location and number of the older Jewish population.

Key informants, including realtors, rabbis, and service providers, will be asked for their expert opinions on the residential location of Jewish older persons, the existence of any NORCs (Naturally Occurring Retirement Communities), and trends in movement. This method will begin to approximate the location of the older Jews.

The residential location of older Jewish people known to the community will be mapped (after the lists are enhanced and cleaned), to determine whether the location of known Jews approximates the practice wisdom of the key informants.

Finally, census data will be used to determine the crude number of older Jewish persons in various locations, using the 1.8% estimate rule. While this is a crude measure, it is the only one available at this time.

Additionally, the number of beds needed at each level of care (e.g., nursing home, assisted care facility, etc.) will be pinpointed through the use of actuarial tables, which indicate the probability of people at different age levels having certain levels of health. This will be supplemented by data from the State of Georgia that indicates anticipated need for nursing home beds by location.

4.2 NEEDS ASSESSMENT

The needs assessment will focus on the demographic characteristics, level of health, type of assistance needed, residential and service needs and preferences, and patterns of service use and satisfaction of the known Jewish community. While it is true that known Jews are not representative of all Jews in Greater Atlanta, they are the best population available from which to sample, since a new population study cannot be done in a timely manner and random digit dialing is impractical.

A systematic stratified sample (with a random start) of lists of people over age 60 known to the Jewish community, or their family members, will be obtained. Prior to using the lists, they will be enhanced by adding the agencies' client and waiting lists, and cleaned for duplication. Cases will stratified based upon location and age. Conservatively, a sample of not more than 384 persons is needed for a 95% confidence interval with an error of plus or minus five percentage points. If more error is tolerable, or if there is some knowledge of the respondents on crucial variables of interest, the sample size can be reduced, saving time and money. If the study seeks information for a period of more than five years, the

age of the potential informants to be included can be expanded to include currently younger people.

Following sampling, approximately ten volunteers will be recruited and trained in data collection.

Data will be collected via the form of a semi-structured interview protocol, now in development. After obtaining their informed consent, informants will be invited to attend a focus group interview, followed by written completion of the protocol. The group questions will be some of those asked in the interview protocol. This method serves two purposes. First, it allows for the completion of many interview protocols simultaneously. Second, it orients informants to the issues of the study so that they may indicate their needs and preferences in an informed manner at the time of protocol completion. This second purpose is also achieved through the interaction with the researcher during individual administration of the interview protocol.

If the informant cannot attend a focus group session, s/he will be offered the opportunity to participate in an individual telephone or in-person interview. The same protocol will then be used. Giving the informants options for data collection increases the response rate and insures that the most at risk due to frailty, isolation, and economic considerations are not selected out of the study.

If an older person is unwilling or unable to participate independently in either format, their family members will be interviewed. Thus, we will have demographic, level of health, type of assistance needed, and patterns of service use and need data on the target 384 informants, and preference and satisfaction data coming from both older persons and their family members.

Additional focus groups alone will be used to obtain qualitative preference and satisfaction data for various target populations that may be missed in other ways. These populations may include older persons using specific services, living in particular housing situations, of certain income groups, or family members/caretakers. Those actually included in these focus groups will be determined as questions arise over the course of data collection.

Data will be coded to be computer ready, analyzed, and prepared for presentation.

4.3 DETERMINING GAPS IN SERVICES

As a result of the needs assessment, the demand for certain services will be articulated. This perceived need will be compared to the assessment of resources available in the community, as determined by the "Taking Stock" process. Thus, the real need for service development and gaps in services will be ascertained.

5.0 MODELS OF EXCELLENCE

Members of the Task Force will visit and report on programs that are known to be models of excellence in service provision to the elderly. These visits will be tied to certain issues that become evident over the course of the study, such as changing rigid thinking about acceptable models of service provision, or learning about the most effective way to develop services that are being considered. Other issues that may be addressed through visits to excellent programs include the "turn key" alternative to nursing home care (whereby the home turns over management of its facility to a private company), or the various ways Jewish communities have decided to fulfill their obligations to the elderly. Moreover, the site visits will be used to expand the group's vision of what the Jewish community can and should be, vis a vis service to the elderly.

To achieve the latter goal, site visits should be made to model programs that are very different in their mode of service provision. Programs visited may include:

- * Kehilla Residential Program (Toronto area), a housing agency of the Jewish Federation, which integrates the elderly with family housing, through supported independent living and multi-generational mutual assistance programs. They are also developing mixed supportive housing in conjunction with their nursing home.
- * Menorah Campus (Buffalo area), which provides the entire continuum of service in a campus based setting.
- * Hebrew Rehabilitation Center (Boston area), a nursing home which changed its philosophy of patient care, sponsors a variety of non-campus elder services, and developed a guaranteed life care community (Orchard Cove).

6.0 ANALYSIS OF EXTERNAL ENVIRONMENT

While the Task Force will have developed an idea of the type of services desired as a result of the planning process, the Jewish community does not exist in a vacuum. Thus, the external environment in which the Jewish community exists must be taken into consideration in order to formulate realistic recommendations. The analysis of the external environment includes:

- * Researching funding opportunities and limitations at the federal, state, and local levels, in both the public and private sector. This may include investigating possibilities of partnerships with public and private, Jewish and non-Jewish, for-profit and not-for-profit agencies.
- * Developing an understanding of the Georgia State regulations governing the development, operation, and payment for various services for the elderly.

- * Assessing the cost effectiveness of different models of service provision.

The researcher and the Task Force will identify and meet with experts in these areas to acquire the needed information.

7.0 CREATING A VISION DRIVEN COMMUNITY

The development of a community vision is embedded throughout the study process. In "Taking Stock", the Task Force members have the opportunity to articulate their personal and agency visions, however limited they may be due to lack of knowledge at this early phase in the research process. In "Models of Excellence", the Task Force members will refine their vision by seeing what is being done outside of the Atlanta Jewish Community. Reporting of the results of the "Market Analysis" may provide another opportunity to expand the perspective of the Task Force to include the perceptions of those the agencies serve.

The final recommendations of the study must include a vision of community role, program ideals, creative resource development, and areas of interagency cooperation. Jewish values should inform and infuse this vision. Rabbinic input will be solicited at this point, and on an as-needed basis at various steps in the research process to insure that this occurs.

Task Force Modules will include "Rabbinic Speaker on Jewish Values" and "Presentation of Market Analysis Results".

8.0 RECOMMENDATIONS

The Task Force will go on a retreat in order to develop recommendations. The major findings of each area of the planning study will be reviewed, including the philosophy or vision that has developed. Recommendations will be derived directly from these findings. The recommendations will speak to issues such as the role of the Jewish community, the type of programs that should be developed, service priorities, the best way to use resources, and the best way for the agencies to work together toward a common goal.

9.0 FINAL REPORT

The Researcher will prepare a final report including the methods, findings, and recommendations of the study.

MODULES FOR THE TASK FORCE

January:	Orientation to the Study Process
February:	Policy Issues and Research Questions
March:	No Meeting
April:	Taking Stock/Building a Community Vision
May:	Data Collection Methods
June:	No meeting (Site Visits)
July:	Reports on Site Visits
August:	Expert on Aging Law and Public Policy: Georgia State Regulations
September:	Expert on Finance and Funding
October:	Rabbinic Speaker on Jewish Values
November:	Presentation of Market Analysis Results
December:	Retreat to Formulate Recommendations

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PROJECT WORK SCHEDULE

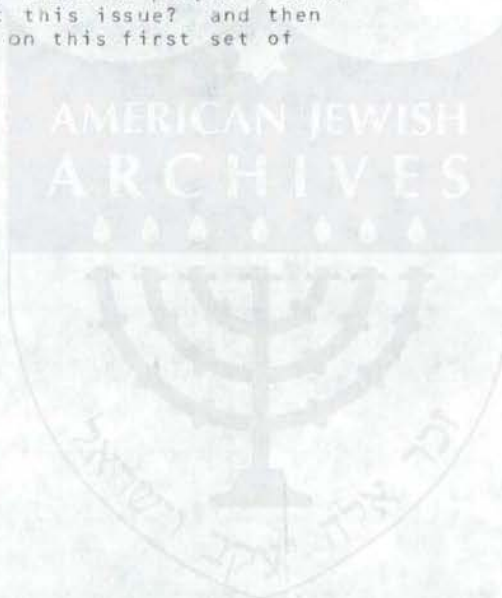
MONTHS

STEPS	J	F	M	A	M	J	J	A	S	O	N	D
1.0 Orientation to the Study Process												
2.0 Policy Issues and Research Questions												
3.0 Taking Stock												
4.0 Market Analysis												
5.0 Models of Excellence												
6.0 Analysis of External Environment												
7.0 Creating a Vision Driven Community												
8.0 Recommendations												
9.0 Final Report												

Option B - 07/12

From: EUNICE::"73321.1217@compuserve.com" 20-MAR-1995 07:15:51.85
To: "INTERNET:GAMORAN@ssc.wisc.edu" <GAMORAN>
CC: "INTERNET:GOLDRIEB@ctr.vax.Vanderbilt.Edu" <GOLDRIEB@ctr.vax.vanderbilt.edu>,
bill <74104.3335@compuserve.com>, Alan <73321.1220@compuserve.com>
Subj: educators survey etc

in a staff meeting on friday, we were talking about the educators survey serving as a form of baseline data against which a community could "measure" its progress over the years. both barry and I felt that it both did create such a base and it didn't. that is, we would be able to measure certain recruitment issues (do more people have masters degrees or college level courses--and in Milwaukee with Cleveland College program going on line maybe this is more than a recruitment issue) or retention issues such as salary/benefits and perhaps even are more inservice courses required and are they experienced as more helpful. is there other data that could emerge from analyzing other elements in the study that would give us a richer baseline picture (e.g., would the issue of people's sense of respect help us?? can you help us think about this issue? and then think about whether there is more work to be done on this first set of data from the three communities. gail



From: EUNICE:"74104.3335@compuserve.com" 21-MAR-1995 15:55:02.64
To: Adam Gamoran <gamoran>
CC: Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>
Subj: Institutional Profiles -Reply

----- Forwarded Message -----

Subject: +Postage Due+Institutional Profiles -Reply
Date: 21-Mar-95 at 13:04
From: "Dan Pekarsky", INTERNET:pekarsky@mail.soemadison.wisc.edu

To: Bill Robinson, 74104.3335

Sender: pekarsky@mail.soemadison.wisc.edu
Received: from wigate.nic.wisc.edu by dub-img-1.compuserve.com (8.6.10/5.941228sam)
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Date: Tue, 21 Mar 1995 11:50:00 -600
From: "Dan Pekarsky" <pekarsky@mail.soemadison.wisc.edu>
Reply-To: pekarsky@mail.soemadison.wisc.edu
Subject: Institutional Profiles -Reply
To: 74104.3335@compuserve.com
X-Gateway: iGate, (WP Office) vers 4.04b - 1032
MIME-Version: 1.0
Content-Type: TEXT/PLAIN; Charset=US-ASCII
Content-Transfer-Encoding: 7BIT

Dear Bill,

I apologize for taking so long to get back to you concerning your Institutional Profiles memo. I found it very interesting and am eager to collaborate with you on the development of an instrument that could be used this coming year when - if all goes well - we begin work with individual institutions. As soon as I can get around to it, I'm going to try my hand and drafting out some concrete ideas that I'd like to add to the mix.

How's the Atlanta Community High School project coming along? Do you have a sense of what impact, if any, the seminar we did with them had?

I hope all's well. Let's keep in touch.

Dan

From: EUNICE:"74104.3335@compuserve.com" 22-MAR-1995 15:00:32.47
To: Adam Gamoran <gamoran>
CC: Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>
Subj: terminology - Nessa

Adam & Ellen,

I had a very long conversation with Nessa today about the terminology for the Module, discussing issues of clarity and how each component relates to one another. The following are her (and my) suggestions for changes to the terminology (that is, the names of the components).

Module for the CIJE Study of Educators

CIJE Educators Survey

Guide to the CIJE Educators Survey

CIJE Educators Interview

[formerly, Professional Lives of Jewish Educators Interview
Protocols]

Guide to the CIJE Educators Interview

In particular, she felt that the name "Professional Lives of Jewish Educators Interview Protocols" was too long and the term "protocol" would not be clear to most audiences. Also, we thought that the name of this qualitative component should be of a similar nature to the quantitative component (i.e., the Educators Survey). Currently, the name of the qualitative component refers to the title of the report to be written, not to the act of research which is the case with the Educators Survey.

If we keep two different protocols for the interviews, the name of specific group being interviewed would be written after a colon. For example: "CIJE Educators Interview: Teachers". Though we need to decide what to call the two groups, which in the past had been called "educators" and "educational leaders". When we combined the two questionnaires into one, we called the composite the Educators Survey. In the Guide to the Educators Survey, I referred to "teachers" and "administrative/supervisory personnel". What terms should we use?

I find this new terminology to be clearer and more concise. Moreover, the terms "CIJE Educators Survey" and "CIJE Educators Interview" can be used to refer to the entire process of using (i.e., from data collection to report writing) the questionnaire and the protocols, respectively.

ALSO, I'm sending you via fax (usual #s), three executive summaries for the day, supplementary and pre-schools in Atlanta as requested by Steve Chervin. Please comment on or approve them before I give them to Steve.

Bill

From: EUNICE::"74104.3335@compuserve.com" 20-MAR-1995 08:43:34.78
To: Adam Gamoran <gamoran>
CC: Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>
Subj: response to gail's e-mail

Adam & Ellen,

My response to Gail's e-mail this morning is as follows:

1. It is certainly useful as baseline data. How useful depends upon what the community sets as its goals for building the profession.

2. It could cover the following changes:

- level of pre-service training
- level and usefulness of in-service training
- early Jewish education
- religious practices (role modeling)
- Hebrew proficiency
- how educators are recruited
- salary & benefits (actual & satisfaction)
- hours of work (FT/PT) and in how many settings
- levels of support received from key personnel
- other employment engaged in

I'm sure there are others, depending on what one wants to change.

3. Communities can add questions to their survey to supplement this baseline data, if they have in mind other changes that they would like to track.

4. As we have said, other work that could be done on the first set of data from the three communities includes (among other issues): salary & benefits, recruitment & career, educators as role models, etc.

Bill

From: EUNICE::"GOLDRIEB@ctrvax.Vanderbilt.Edu" 20-MAR-1995 09:00:26.28
To: 74104.3335@compuserve.com
CC: gamoran
Subj: Re: response to gail's e-mail

I agree with you Bill on gail's e-mail, it may be helpful to get some idea about which base-line issues Gail is referring to, because there are also other questions (more "subjective" in nature) that we did not analyze or write about, such as the things Gail mentioned (respect). I also think the ways in which we changed the questionnaire to ask the respondents to rank , or check the top three, rather than a Likert scale, may give us better data.

I also think this gets at a point we mentioned many times, they need to be able to articulate THEIR goals, that is what they want us to measure, so we are not just fishing. She may be right in that this survey is not what they are looking for, but the answer is not to change this survey .



From: EUNICE::"73321.1217@compuserve.com" 20-MAR-1995 07:15:51.85
To: "INTERNET:GAMORAN@ssc.wisc.edu" <GAMORAN>
CC: "INTERNET:GOLDRIEB@ctrvax.Vanderbilt.Edu"
<GOLDRIEB@ctrvax.vanderbilt.edu>,
bill <74104.3335@compuserve.com>, Alan <73321.1220@compuserve.com>
Subj: educators survey etc

in a staff meeting on friday, we were talking about the educators survey serving as a form of baseline data against which a community could "measure" its progress over the years. both barry and I felt that it both did create such a base and it didn't. that is, we would be able to measure certain recruitment issues (do more people have masters degrees or college level courses--and in Milwaukee with Cleveland College program going on line maybe this is more than a recruitment issue) or retention issues such as salary/benefits and perhaps even are more inservice courses required and are they experienced as more helpful. is there other data that could emerge from analyzing other elements in the study that would give us a richer baseline picture (e.g., would the issue of people's sense of respect help us)? can you help us think about this issue? and then think about whether there is more work to be done on this first set of data from the three communities. gail



ADH conf call 4/4/95

- ② assets framed leaders rpt for steering comte
prob yes to pol but on leaders

IB - Oct '95, ?

- ① present module to steering comte
* - AG - incl anchor items

- ③ present design of "evaluated institute" to S.C., subcommittee
- write, Give to Garry, have her reach ECR

move ahead w/ informal education !

~~for next~~ for a call before 6d mtg
- so over talking pts for pres to S.C. on eval. inst.

* AG - letter ~~to~~^{from} ECR to 6d comte

- here's what we've done

- here's what's in the works

- agenda E6 ~~1. module~~ 1. prelim findings from surv of ed leaders

A6 2. module
3. proposed evaluated institute - ADH

From: EUNICE::"74104.3335@compuserve.com" 5-APR-1995 09:32:03.50
To: "Alan Hoffmann (in US)" <73321.1220@compuserve.com>
CC: Adam Gamoran <gamoran>, Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>, Gail Dorph <73321.1217@compuserve.com>
Subj: Conference call of April 4th

To: Alan Hoffmann, Adam Gamoran, Ellen Goldring, and Gail Dorph

From: Bill Robinson

Re: Conference call of April 4th.

A. We focused on the MEF work plan, as outlined in Adam's memo of March 8th.

1. It was affirmed that the full integrated report on teachers in the lead communities would be completed in August, the four reports on educational leaders (one for each lead community and a combined report) will be completed in May, and the Research Paper on levers for change in extent of in-service will be completed in June.
2. It was also affirmed that when the NY staff receives the combined educational leaders report, they will decide on whether or not the Policy Brief for this year will deal with the educational leaders.
3. The Module for The CIJE Study of Educators will be completed (in draft form) and ready for presentation to the Board Steering Committee at their meeting on April 26th (see below). As part of this process, Adam will identify anchor items in the CIJE Educators Survey.
4. Whether or not the other two Research Papers (on teacher power and teacher in-service) will be done awaits a decision by Alan.
5. Concerning, the proposed MEF evaluation of the CIJE's training of trainers and training of goals coaches, the MEF team awaits information from the NY staff and Dan Pekarsky (respectively) regarding the objectives of the programs, as well as when and where they will be taking place.
6. Alan stated that in his conversations with communities, they expressed excitement about the idea of an Evaluation Institute. The next step will be to obtain Board approval. Alan met with a woman who would be perfect for the position of administrator of this project, but she is more interested in conducting evaluation than doing administration. Alan will continue to look for a part-time administrator to coordinate the proposed Evaluation Institute.
7. MEF should move ahead with thinking about how to do research on informal education.
8. Alan expressed his concern about the cost of a CIJE seminar in Jerusalem to discuss "what we have learned from three years of MEF". He will consider ways to do this less expensively. He suggested the possibility of Adam, Ellen, Annette and himself meeting in Jerusalem to develop briefing papers for the envisioned new academic advisory committee of the whole CIJE (see below). The four would design a mini-conference on what we have learned for people who know very little about the CIJE (i.e., the new academic advisory committee - as a means of bringing them up to speed).

B. We discussed the upcoming Board Steering Committee meeting and the meeting of the Board Subcommittee on Research and Evaluation.

1. It was decided that Adam/Ellen will present a few "nuggets" from the educational leaders data at both meetings.
2. It was also decided that Adam/Ellen will present (a draft of) the Module for The CIJE Study of Educators at both meetings.
3. It was also decided that the concept of the Evaluation Institute would be presented and discussed at both meetings. The Steering Committee will be asked to make a decision on whether CIJE should go ahead with this project. It was not decided who would present this to the Steering Committee.
4. Adam & Ellen will compose a letter to be sent to the Board Subcommittee on Research and Evaluation from Esther Leah Ritz that outlines what will be discussed at the meeting, as well as a two page memo detailing what MEF has done since the last Board Subcommittee meeting and what MEF is currently engaged in. Either Adam or Ginny will contact Esther to obtain her consent to compose and distribute the letter and memo.

C. Other

1. Alan authorized the purchase of a software program and a manual (cost of approximately \$100) to be used by MEF for producing the Module for The CIJE Study of Educators.
2. Alan mentioned that a new academic advisory committee may be formed whose domain would encompass the whole CIJE (as opposed to just the MEF). A tentative idea is to have this academic advisory committee meet for two days in October of 1995. Ellen and Adam suggested Susan Stodolsky as a possible member of this new committee. She's a published educational researcher (University of Chicago Press), with expertise in program evaluation (qualitative and mixed methodologies) and as a content specialist (social science and mathematics). She's also Jewish.
3. Conference calls with Alan, Gail, Adam, Ellen, and Bill will be a regular occurrence, scheduled to take place approximately every other week. However, the next conference call will be on Tuesday, April 11th at 8:00 a.m. Central Time. Debra will coordinate the call. Among the agenda items will be the MEF evaluation of the CIJE's own work (i.e., training of trainers and training of goals coaches), and the "talking points" for presentation of the proposed Evaluation Institute to the Board Steering Committee.

facsimile

TRANSMITTAL

to: ADAM GAMORAN
fax #: (608) 265-5389
re: Final version of Terminology Guide
date: April 28, 1995
pages: 3, including cover sheet.

Adam,

Here's a finalized copy of a guide for usage of key terms associated with The CIJE Study of Educators.

Bill

From the desk of...

Bill Robinson
Field Researcher
CIJE
1525 Wood Creek Trail
Roswell, Georgia 30076

(404) 552-0930
Fax: (404) 998-0860

GUIDE TO THE CIJE TERMINOLOGY - APRIL 1995

The CIJE Study of Educators - This is the broadest term (with the exception of the envisioned evaluation training virtual college that at some future point may engage in other areas of research and community planning). It encompasses all research activities concerning teachers (educators) and administrative/supervisory personnel (educational leaders) in Jewish schools, conducted by or in conjunction with the Council for Initiatives in Jewish Education (CIJE). It includes the instruments by which the research was and will be conducted, research and policy briefs that have been and will be issued based on the findings of the research, as well as any guides or other materials that will be issued to assist in the performance of the research and the writing of any briefs or other reports.

Module for The CIJE Study of Educators - This encompasses the instruments by which research was and could be conducted on teachers and administrative/supervisory personnel in the Jewish schools within local communities, as well as guides for conducting the research and generating reports on the findings of the local community research. It will include at least the CIJE Educators Survey, the CIJE Educators Interview, and their respective Guides.

CIJE Educators Survey - The questionnaire by which teachers and administrative/supervisory personnel working in Jewish schools have been and could be surveyed in local communities.

Guide to the CIJE Educators Survey - Procedures and other information written to assist local communities in using the CIJE Educators Survey. It could include procedures for revising the questionnaire, disseminating & collecting the questionnaire, coding the data, producing & analyzing the data, generating findings from the data, and writing a report. It could also include procedures for providing a useable copy of the coded data to a national repository. [The Guide to the CIJE Educators Survey Guide is to be distinguished from curricular guides that will be written to assist those training local community personnel in the use of the Module for The CIJE Study of Educators.]

CIJE Educators Interview - The questions which have guided and could guide in-depth interviews with teachers and administrative/supervisory personnel in the Jewish schools in local communities. There are separate sets of questions for teachers and administrative/supervisory personnel. They are called, respectively, the CIJE Educators Interview Teachers Protocol and the CIJE Educators Interview Administrators Protocol.

Guide to the CIJE Educators Interview - Procedures and other information written to assist local communities in using the CIJE Educators Interview. It could include procedures for revising the questions, sampling the teachers and administrative/supervisory personnel, conducting the interviews, coding and analyzing the data, generating findings from the data, and writing a report.

Policy Brief - Reports written by the staff of the CIJE [or possibly in conjunction with the staff of the CIJE] for national dissemination. These reports focus on policy implications, using research findings to support national and local planning recommendations. Currently, research findings are based on data that has been obtained from administering the CIJE Educators Survey and the CIJE Educators Interview in the CIJE's three Lead Communities. [Whether future Policy Briefs will include findings from data obtained by administering the Module for The CIJE Study of Educators in other communities or other research instruments is uncertain.]

Research Paper - Reports written by the staff of the CIJE or in conjunction with the staff of the CIJE for national dissemination. These reports focus on the research findings themselves. Currently, research findings are based on data that has been obtained from administering the CIJE Educators Survey and the CIJE Educators Interview in the CIJE's three Lead Communities. [Whether future Research Papers will include findings from data obtained by administering the Module for The CIJE Study of Educators in other communities or from other research instruments is uncertain.]

facsimile

TRANSMITTAL

to: ADAM GAMORAN
fax #: (608) 265-5389
re: Request Form
date: April 28, 1995
pages: 2, including cover sheet.



From the desk of...

Bill Robinson
Field Researcher
CIJE
1525 Wood Creek Trail
Roswell, Georgia 30076

(404) 552-0930
Fax: (404) 998-0860

From: EUNICE:"73443.7152@compuserve.com" 28-APR-1995 16:52:19.23
To: "Gamoran, Adam" <gamoran>
CC:
Subj: CIJE papers

Dear Adam,

Great news! I have read your message and talked with Roberta and we are very happy to write the papers and to accept the terms you outlined. Look forward to getting an "official" contract or whatever. Shabbat shalom, Julie



April 28. 1995

Dear Julie and Roberta,

After long and persistent efforts, I am pleased to say that CIJE would like to commission you to write two research papers, one on "teacher power" and the other on "teacher in-service." The papers are to be based largely on the corresponding chapters in "The professional lives of Jewish educators in Baltimore," but we are asking for two additional features: (1) Data from the Milwaukee "professional lives" study are to be incorporated as appropriate; (2) The studies are to be placed in the context of other research on their topics so they can speak to a broader audience (but still within the world of Jewish education).

CIJE is offering total fees for these papers, including all authors and all expenses, of \$4000 per paper.

The papers would undergo the following review process: Initial draft to be reviewed by CIJE staff (including me); after revision, second draft to be reviewed by CIJE academic advisors; after further revision, final draft submitted. Fees would be payable on the following schedule: 50% upon submission of first draft; 40% upon submission of second draft; 10% upon acceptance (not submission) of final draft.

Upon acceptance of the final draft, CIJE will disseminate each paper in a "CIJE Discussion Paper" series. After that dissemination, you will be free to submit the papers for journal publication.

I would like to schedule a conference call to discuss this project, including the scope of work and the terms and conditions of work. If you agree to do it, we will also need to select appropriate deadlines. Please think carefully about the timing of the project; I have great flexibility in selecting the deadlines, but once they are set it will be important to adhere to them.

This letter is not an official contract; as you know I don't have the authority to make an official offer. After we (I hope) agree on the terms, Alan Hoffmann will send you an official contract for you to sign.

It is easiest to reach me by e-mail, but you can also reach me by phone or fax (608) 265-5389.

Best,

Adam

UNITED STATES

Baseline	Most Recent Update	Overall Progress
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1. Children's Health Index: Has the U.S. reduced the percentage of infants born with 2 or more health and developmental risks? (1990, 1991) ▲	14%	13%	↑
2. Immunizations: Has the U.S. increased the percentage of 2-year-olds who have been fully immunized against preventable childhood diseases? (1992)	55%	—	
3. Family-Child Reading and Storytelling: Has the U.S. increased the percentage of 3- to 5-year-olds whose parents read to them or tell them stories regularly? (1993)	66%	—	
4. Preschool Participation: Has the U.S. reduced the gap in preschool participation between 3- to 5-year-olds from high- and low-income families? (1991, 1993)	28 points	28 points	↔
5. High School Completion: Has the U.S. increased the percentage of 19- to 20-year-olds who have a high school credential? (1992, 1993)	87%	86% ns	↔
6. Mathematics Achievement: Has the U.S. increased the percentage of students who meet the Goals Panel's performance standard in mathematics? ▼			↑
• Grade 4 (1990, 1992)	13%	18%	↑
• Grade 8 (1990, 1992)	20%	25%	↑
• Grade 12 (1990, 1992)	13%	16% ns	↔
7. Reading Achievement: Has the U.S. increased the percentage of students who meet the Goals Panel's performance standard in reading? ▼			
• Grade 4 (1992)	25%	—	
• Grade 8 (1992)	28%	—	
• Grade 12 (1992)	37%	—	
8. International Mathematics Achievement: Has the U.S. improved its standing on international mathematics assessments of 13-year-olds? (1991) ●	U.S. below 5 out of 5 countries	—	
9. International Science Achievement: Has the U.S. improved its standing on international science assessments of 13-year-olds? (1991) ●	U.S. below 3 out of 5 countries	—	
10. Adult Literacy: Has the U.S. increased the percentage of adults who score at or above Level 3 in prose literacy? (1992) ■	52%	—	
11. Participation in Adult Education: Has the U.S. reduced the gap in adult education participation between adults who have a high school diploma or less, and those who have additional post-secondary education or technical training? (1991)	27 points	—	
12. Participation in Higher Education: Has the U.S. reduced the gap between White and Black high school graduates who:			
• enroll in college? (1990, 1992)	14 points	14 points	↔
• complete a college degree? (1992, 1993)	16 points	17 points ns	↔
Has the U.S. reduced the gap between White and Hispanic high school graduates who:			
• enroll in college? (1990, 1992)	11 points	6 points ns	↔
• complete a college degree? (1992, 1993)	12 points	18 points ns	↔
13. Overall Student Drug and Alcohol Use: Has the U.S. reduced the percentage of 10th graders reporting doing the following during the previous year:			
• using any illicit drug? (1991, 1993) ■	24%	27%	↓
• using alcohol? (1991, 1993)	72%	69%	↑
14. Sale of Drugs at School: Has the U.S. reduced the percentage of 10th graders reporting that someone offered to sell or give them an illegal drug at school during the previous year? (1992, 1993)	18%	20% ns	↔
15. Student and Teacher Victimization: Has the U.S. reduced the percentage of students and teachers reporting that they were threatened or injured at school during the previous year?			↑
• 10th graders (1991, 1993)	40%	35%	
• public school teachers (1991)	10%	—	
16. Disruptions in Class by Students: Has the U.S. reduced the percentage of students and teachers reporting that disruptions often interfere with teaching and learning?			↔
• 10th grade students (1992, 1993)	17%	18% ns	
• high school teachers (1991)	33%	—	

— Data not available.
ns Interpret with caution. Change was not statistically significant.

▲ See technical note on page 133.
▼ See technical note on pages 134-135.
● See technical note on pages 135-136.

■ See technical note on page 136.
■ See technical note on page 137.

"If you're not keeping score, you're just practicing."

Vince Lombardi

THE NATIONAL EDUCATION GOALS REPORT

Building a Nation
of Learners

1994



The National Education Goals

1. All children in America will start school ready to learn.
2. The high school graduation rate will increase to at least 90 percent.
3. All students will leave grades 4, 8, and 12 having demonstrated competency over challenging subject matter including English, mathematics, science, foreign languages, civics and government, economics, arts, history, and geography, and every school in America will ensure that all students learn to use their minds well, so they may be prepared for responsible citizenship, further learning, and productive employment in our Nation's modern economy.
4. The Nation's teaching force will have access to programs for the continued improvement of their professional skills and the opportunity to acquire the knowledge and skills needed to instruct and prepare all American students for the next century.
5. United States students will be first in the world in mathematics and science achievement.
6. Every adult American will be literate and will possess the knowledge and skills necessary to compete in a global economy and exercise the rights and responsibilities of citizenship.
7. Every school in the United States will be free of drugs, violence, and the unauthorized presence of firearms and alcohol and will offer a disciplined environment conducive to learning.
8. Every school will promote partnerships that will increase parental involvement and participation in promoting the social, emotional, and academic growth of children.

Core Indicators

Sixteen core indicators are the central focus of the 1994 Goals Report. They were selected with the assistance of members of the Goals Panel's Resource and Technical Planning Groups, who were asked to recommend a small set of indicators for the core that were, to the extent possible:

- comprehensive across the Goals;
- most critical in determining whether the Goals are actually achieved;
- policy-actionable; and
- updated at frequent intervals, so that the Panel can provide regular progress reports.

The core indicators are discussed in detail in Chapter 2 of this Report. The sixteen are:

GOAL 1: READY TO LEARN

1. Children's Health Index
2. Immunizations
3. Family-child reading and storytelling
4. Preschool participation

GOAL 2: SCHOOL COMPLETION

5. High school completion

GOAL 3: STUDENT ACHIEVEMENT AND CITIZENSHIP

6. Mathematics achievement
7. Reading achievement

GOAL 4: TEACHER EDUCATION AND PROFESSIONAL DEVELOPMENT

(No core indicators have been selected for this new Goal yet. They will be addressed in future Goals Reports.)

GOAL 5: MATHEMATICS AND SCIENCE

8. International mathematics achievement comparisons
9. International science achievement comparisons

GOAL 6: ADULT LITERACY AND LIFELONG LEARNING

10. Adult literacy
11. Participation in adult education
12. Participation in higher education

GOAL 7: SAFE, DISCIPLINED, AND ALCOHOL- AND DRUG-FREE SCHOOLS

13. Overall student drug and alcohol use
14. Sale of drugs at school
15. Student and teacher victimization
16. Disruptions in class by students

GOAL 8: PARENTAL PARTICIPATION

(No core indicators have been selected for this new Goal yet. They will be addressed in future Goals Reports.)

Professional Development Is High on Administration Agenda

Continued from Page 1

retary of Education Marshall S. Smith, "isn't the most important thing we can do is try to help teachers get the training they need to be able to work with students in an effective manner?"

While many educators welcome the attention, there are disagreements over how the government can best encourage professional development that goes beyond the

ment," said Michael W. Kirst, a professor of education at Stanford University. "There is just no conceptual understanding as to what it takes to implement complex curricular material."

Good professional development, researchers have learned, brings teachers together in networks that wrestle, over time, with important issues. Teachers should also receive coaching and follow-up help in using new practices in the classroom.

Goals and Funds

A new national education goal, added by Congress to the original six goals negotiated by the Bush Administration and the National Governors' Association, signals the new federal interest in professional development by calling for teachers to have access to "programs for the continued improvement of their professional skills."

The Goals 2000 law enacted earlier this year, which codified the goals, also requires states that apply for federal school-reform grants to draft improvement plans spelling out how they will help develop teachers' capacity to provide high-quality instruction centered on content and performance standards.

States are to make grants to districts to develop their own reform plans, which must include strategies for improving teaching. They also can make grants to districts or groups of districts to work with colleges and universities to improve teacher education.

The Goals 2000 law puts school districts in the driver's seat in seeking out partnerships with colleges and universities that can meet their needs, said David G. Imig, the chief executive officer of the American Association of Colleges for Teacher Education.

"The school of education or the dean has to look outside the university for a connection and a part-

nership in a much more aggressive way," Mr. Imig said.

Links to Standards

The Education Department's proposals for reauthorizing the E.S.E.A. also heavily stress professional development, calling for it to become "a vehicle for reform."

The Administration proposed creating a new Eisenhower professional-development program, expanding the existing mathematics and science program to support professional development in a variety of disciplines.

The Administration had proposed eliminating the Chapter 2 block grant and combining the funding authorized for that program and the current Eisenhower program to set a funding ceiling of \$752 million for the new effort.

HR 6, the E.S.E.A. bill that has cleared the House, and S 1513, the companion bill pending in the Senate, both reject the proposal to scrap Chapter 2. But both would create an expanded professional-development initiative as well.

Both versions of the E.S.E.A. bill make it clear that professional-development activities should be linked to challenging content and performance standards.

But the legislation is flexible, providing not mandates but a list of possible activities that differs somewhat between the two versions.

The money could be used for such purposes as developing new ways of assessing teachers and administrators for licensure, supporting local and national professional networks, or providing incentives for teachers to become certified by the National Board for Professional Teaching Standards. School districts could use the money to release teachers from their classes.

In a related effort, the Administration has proposed consolidating more than 50 technical-assis-

tance centers now funded under Chapter 1, bilingual education, drug-free schools, and other categorical programs into a system of 10 regional centers that would take an integrated approach to helping states and districts with professional development and school reform.

Both versions of the E.S.E.A. legislation endorse the consolidation.

A Chapter 1 Set-Aside?

The Senate bill also calls for creating a "national teacher training project," modeled after the National Writing Project.

Lawmakers are also considering how and whether to address professional development under the Chapter 1 compensatory-education program.

The Independent Commission on Chapter 1, formed by a group of child advocates, is pushing for a provision setting aside some Chapter 1 money specifically for professional development.

But the Administration argues that requiring districts to set aside money under Title I—the name Chapter 1 would revert to under the E.S.E.A. bills—would contradict its commitment to local flexibility and schoolwide strategies.

The Senate bill would earmark 10 percent of districts' funding for professional development; HR 6 contains no such provision.

"We thought it didn't make sense to come up with an arbitrary percentage required across the board in all Title I schools," said Thomas W. Payzant, the assistant secretary for elementary and secondary education.

But Kati Haycock, a member of the Chapter 1 commission's steering committee, argued that a set-aside would be controlled by educators who are responsible for raising student achievement. Eisenhower money, she noted, would be "in the hands of the district."

"What tends to happen is schools that most desperately need the help don't get it," she said. "Title I has the wonderful benefit of putting the greatest investment in the schools with the greatest problems."

Are Schools Ready?

While praising the effort to improve professional development, some observers fear that states and districts lack the know-how to follow through.

"How in the world do you now do site-based, continuous in-service education or professional development without any kind of preparation of principals and lead teachers and others to do this?" asked Mr. Imig of the A.A.C.T.E.

In some of the legislation, he said, "there is a presumption that you put two teachers together and they have a wonderful conversation that leads to change."

Glen Cutlip, a senior policy analyst at the National Education Association, said the union seconds the Administration's view that "standards and assessments may not be a magic bullet without other things."

But Mr. Cutlip said he still worries that some politicians and educators are placing too much faith in a "mechanistic" view that assumes a direct link between setting standards for students, training teachers, and improving outcomes.

"Clearly, it's going to be hard to do this," Undersecretary Smith said of improving professional development. But he argued that a policy calling for training teachers to help students reach higher standards will "begin to focus behavior."

"The only way to get going is to start to stimulate it, showing examples, reinforcing and rewarding, and providing resources when people need it," he said.

Training seen key in push for higher academic standards for students.

typical one-shot workshops.

The debate is one that has not been heard in Washington for about 20 years, said John F. Jennings, the education counsel for the House Education and Labor Committee.

President Ronald Reagan cut the teacher-development programs that had been started in the 1970's, though Congress began putting money into training mathematics and science teachers in the mid- and late 80's, through the National Science Foundation and the Eisenhower math and science program.

"This will be a big chore," Mr. Jennings said. "We're not going to revive professional development in a year or two."

A growing body of research suggests that without attention to teachers' knowledge and skills, reform efforts may be wasted.

"The Achilles' heel of school curricular reform and higher standards is the relative lack of depth and the execution of staff develop-

Teacher Training A Key Focus for Administration

By Ann Bradley

Washington

Most of the attention paid to the Clinton Administration's education agenda has centered on its push to set rigorous academic standards and create a new system for assessing students' progress.

But the Administration also is placing a major emphasis on professional development, arguing that teachers need more sustained, intensive training to prepare them to teach to higher standards.

The focus on professional development is most obvious in the Goals 2000: Educate America Act and in the Administration's proposals for the Elementary and Secondary Education Act.

The Education Department also has formed a task force that is to recommend ways to make better use of the professional-development money appropriated under existing federal programs.

"If what we're trying to do is to change teaching and learning," asked Undersec-

Continued on Page 20

~~ELR~~

ed lead rpts to communities

- overall res. lts + distinctive

— ELR - not out of date

- prof. le same despite

- poss better ^{transfer} due to
LC involvement

- but - is it useful to give generalities

- perhaps ask the community

- take acit of larger elements

- review own situat + see
what applies

— in intro - expl problems
of generaliz, small size, timing

- read general situat
+ think about own context,
determine what applies
to own situation

- challenge community to
figure out what the case -
by - case situation would be

~~Potman's office~~

6/8/95

meet. w/ ECR

① work carried out

① memos
- eval. instit
- informal ed

② ed leaders rpt

③ research network paper on "levers"

② MEF capacity probs

③ help from ECR

① where we are in informal ed
② how to work w/ commun. ties
on leaders data
③ further disc of eval. instit

— res paper

— impts of BHU

— early child ed neglected by leadership

— informal ed

formal settings ~~will~~ benefit from learning techniques
informal setting may be most congenial
setting for formal instruction

— e.g. in gen ed small settings

— what do informal ed. cators & center staff?

— teach how to tap into common resources
how to develop informal approaches

5 MSW prog dir concerned abt hiring ed. cators
to care about & adapt ed

— need to have ed component to MSW progs?

— how abt rabbinical poss as trng for ed. cators
(not just for center)

From: EUNICE: "74571.3370@compuserve.com" 15-JUN-1995 13:22:57.28
To: Adam <gamoran>
Cc: Alan <73321.1220@compuserve.com>
Subj: dissemination cover letter

Thanks for your note and your willingness. We have now--you'll be happy to hear--actively embarked on this as a top priority.

I am about to create a template letter which will include not only the policy brief itself and a CIJE brochure but also: mention of the Cummings grant/virtual college; the fact that other cities are undertaking the survey; and selected press clips. The letter will also mention the existence of the manual, the soon-to-be-available software package, the anchor items, and the intention of creating a national data base.

You could be very helpful in giving me language to describe the latter items, given not only your knowledge but your understanding of what communities are looking for and what questions they are asking that this letter could briefly address.

At this point the letter will probably be coming from different people, depending on the audience. I did not ask Alan if we should put a "For further information, please contact." I am, through this note, asking Alan who, if anyone, that contact should be. (Perhaps the office; probably not you; perhaps me; and perhaps no one, on the grounds that if they want to, our number is on the letter and it reads less "selling" and more "for the common good" if we don't say "For further information.")

The tone of the letter will be factual and compelling ("This is a way to make a difference") rather than "show-and-tell selling" about CIJE.

What follows is the one paragraph we all use about the policy brief and the list Roberta created. We are in the process of entering that list and others into the computer. Once the letter is done, we can send the package out immediately. My goal is to get the entire job done in July (the most up-to-date CJF directory will be ready in early July).

I'm in the office Mon. and Tues. and then in Chicago through the week. Feel free to create a cover letter or parts of one; I'll integrate it with mine, if need be. (If there's something particular to say about rabbis, we should do it. I know that the Best Practices work highlights their indispensability to great schools--and I know rabbis are also deemed the major impediment to change among many people!) Obviously, since you're signing the letter to the Reform rabbis, you certainly see the final version. (I want Alan to read each letter for the range of constituencies before it's sent out.)

I'll be sending you my comments on the ed. ltrs. Monday.

The paragraph:

"Released in November 1994, the findings summarized in this policy brief juxtapose the severe lack of training of most teachers in Jewish schools with an unexpected degree of commitment and stability, making a strong case for far greater and more comprehensive in-service training of educators in the field than currently exists. The brief offers a striking argument for investing in our educators."

From Roberta: 1/95

Nessa:

I went through the entire HUC directory of Reform rabbinic alumni. I came up with these two lists based on these criteria for the rabbis:

- 1) supportive of Jewish education;
- 2) made a contribution to Jewish education through a particular program, programming in general, writing, curriculum development.

I did add one or two rabbis because I thought that they were "a must" for political reasons or because of their positions. All of these rabbis are active in the Reform movement although not all work in synagogues.

Only two of the rabbis are in Lead Communities -- that is a comment in itself. A few of the rabbis are NATE members. As I did not know if you would be sending a special letter to this select group, I thought that they were worth mentioning. I have indicated their membership beside their names. A few of the rabbis are on the Executive Committee of the CCAR, a group to whom I think you should send the report immediately.

Group #1

Shelly Zimmerman, Dallas, President of CCAR, honorary member of NATE
Harvey Fields, Los Angeles
Jack Luxemburg, Maryland -- D.C. suburbs
Michael Weinberg, suburban Chicago -- Skokie
Terry Bookman, Milwaukee
Rick Block, Los Altos Hills, CA
Rick Jacobs, Westchester, NY
David Whiman, suburban Boston
Alan Bregman, Chicago
Larry Englander, Mississauga, suburban Toronto
Nancy Flam, San Francisco area
Aryeh Azriel, Omaha
Irwin Zeplovitz, Hamilton, Ontario
Peretz Wolf Prussan, San Francisco, NATE member
Lewis Kamrass, Cincinnati
Morley Feinstein, South Bend, Indiana, CCAR Executive Committee, NATE member
Elka Abramson, St. Paul
Marty Zinkow, St. Paul
Richard Levy, Los Angeles
Rachel Cowan, NYC
Simeon Maslin, Philadelphia, next president of CCAR
Steve Foster, Denver
Elyse Goldstein, Toronto
Larry Kushner, suburban Boston
Sam Joseph, HUC in Cincinnati, NATE member (He would be a better HUC person to ask than Norman Cohen in terms of actually getting names -- he knows what is going on in the field. Norman is better for political reasons.)
Peter Knobel, Evanston, IL, candidate to replace Alex Schindler
Eric Yoffie, UAHC in NYC, candidate to replace Alex Schindler
Larry Hoffmann, HUC in NYC, candidate to replace Alex Schindler (These are the three finalists.)
Michael Meyer, HUC in Cincinnati works on the Educated Jew Project, he should have a copy

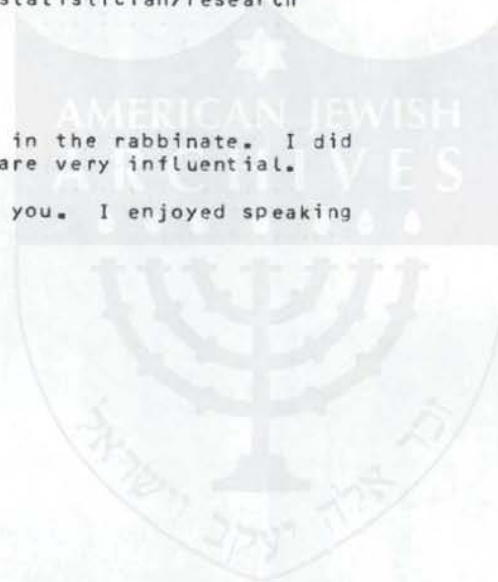
Group 2

Stanley Davids, Atlanta
Steve Denker, Chicago
Ray Zwerin, Denver
David Ellenson, HUC in Los Angeles (He should have been working on the
Educated Jew Project for the and not Michael Meyer.)
Dan Freeland, UAHC NYC
Gary Yales, Lexington, MA
Ronne Friedman, Buffalo
Marc Gellman, NYC suburbs
Debbie Bronstein, Boulder, CO
Jan Katzew, Chicago
Eliot Kleinman, Chicago
Ron Klotz, Indianapolis, Indiana
Howard Laibson, Long Beach, CA
Steve Rosman, NY or Connecticut
Jeff Salkin, NYC suburbs
Sandy Seltzer, UAHC in Boston -- he's the UAHC's statistician/research
person
Mark Shapiro, Glenview, IL
Jim Simon, Worcester, MA
Rifat Soncino, suburban Boston, NATE member

I chose people interested in education and active in the rabbinate. I did
not chose all the power people. Some on my list are very influential.

Let me know how I can be of further assistance to you. I enjoyed speaking
to you yesterday!

Roberta



From: GAMO::GAMORAN 16-JUN-1995 15:27:40.89
To: EUNICE::"74571.3370@compuserve.com"
CC: GAMORAN
Subj: RE: dissemination cover letter

First, I like Roberta's list very much and have only a few to add. These go in her category 1, "supportive of Jewish education":

Steven Bob, Lombard, IL (Chicago suburb)
Donald Rossoff, Morristown, NJ
Douglas Cohen, Hoffman Estates, IL (Chicago suburb)
Herbert Bronstein, Glencoe, IL (Chicago suburb)
Steve Hart, Long Grove, IL (distant suburb of Chicago)
Gary Zola, Dean of Admissions, HUC (Cincinnati)
Arnold Wolf, Chicago, IL
Mark Shapiro, Glenview, IL (Chicago suburb)

Second, I didn't get to the letter today, so I'll work on it next time I get a chance.



GAMOS type gail.qs

From: EUNICE::"73321.1217@compuserve.com" 22-MAY-1995 21:07:58.31

To: "INTERNET:GAMORAN@ssc.wisc.edu" <GAMORAN>

CC:

Subj: Re: for discussion at 5/22 meeting of NY staff

dear adam. thanks for sending so promptly and we will talk about it on 23rd at 4:00 EDT.

also on our list:

1. what about John Coleman's idea for a software package for use in analyzing data?

2. what about the qualitative study?

what's relationship of qualitative study to anchor items/

(these kinds of questions emerged as we began to think about the kinds of questions that we were being asked on our trip West.

on a different front:

3. When will leadership report actually be ready?

4. Structure and content of discussion of informal educators at june 7th meeting

talk to you tuesday. gail

Bills sched

Seminars

(1) survey - tools - etc

(2) interview - tools - analysis etc.

(3) writing a policy rpt - telling a story

- get together as a in after analysis,
before writing rpt

Red Ex

Gail D.

588 West End Apt. 2A

NY 10024

(212) 769-0725

66
852 Highland Crest Dr. Magnolia Circle
TN 37205 Payne Hall
Dept of Ed Lear
(615) 356-5504 P
37203
(615) 322-8000

WR
1525 Wood Creek Trail
Roswell, GA 30076
404 552-0930

2 weeks for response

e-mail to Annette

RLG 149 Nautlus

JT 58 PL 21209

#9 29-MAY-1995 19:53:20.63

MAIL

From: GAMO::GAMORAN
To: BILL
CC: GAMORAN
Subj: annette's address

Found Annette's new address:

Mandel Institute
15 Graetz St.
Jerusalem 92226
ISRAEL

tel. (02) 662-832

MAIL>



Magnolia Circle
Payne Hall
D of E L
37203



852 Highland Crest Dr
Mesa
37205