MS-831: Jack, Joseph and Morton Mandel Foundation Records, 1980–2008.
Series D: Adam Gamoran Papers. 1991–2008.
Subseries 1: Lead Communities and Monitoring, Evaluation, and Feedback (MEF), 1991–2000.

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Planning Guide and Program Guidelines, 1992.

LEAD COMMUNITIES

A PROJECT OF THE COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

PROGRAM GUIDELINES

January 1992

The Council for Initiatives in Jewish Education was established as an outgrowth of the Commission on Jewish Education in North America in November 1990.

CIJE brings together distinguished educators, professionals, lay leaders and philanthropists of the continental Jewish community to energize Jewish education in North America. Visions of what should and can be achieved in the 21st century need to be repeatedly placed before our communities' leadership, and the wherewithal to do so obtained. The CIJE can provide a unique blend of individual and institutional advocacy in North America.

The Lead Communities Project is intended to demonstrate that local communities can significantly improve the effectiveness of Jewish education through careful organizing for the task, with a coalition of community institutions, supplemented with continental institutions and resources.

We invite you to apply to become a participant in a systematic, creative and visible experiment to create communities of educated Jews to help insure the continuity of the Jewish people.

Morton L. Mandel
Chair

Purpose of Guidelines

These guidelines are designed to help communities answer the questions:

- Should we seek to become a lead community?

- How do we apply?

What and Why a Lead Communities Project?

The Lead Communities Project is a joint continental-local collaboration for excellence in Jewish education. The purpose is to demonstrate that it _is_ possible to significantly improve Jewish education, both formal and informal, in communities in North America with the right combination of leadership, programs, resources, and planning.

Three communities in North America, each with a population of between 15,000 and 300,000, will be invited to join with the Council for Initiatives in Jewish Education in carrying out the Lead Communities Project.

The central thesis of the Lead Communities Project is that the best way to generate positive change at the continental level is to mobilize the commitment and energy of local communities. The successes achieved by local communities are the most compelling testimony to what is possible.

For the purposes of this project, a " community" is an urban or metropolitan geographic area with a communal organization structure and decision-making system in place.

See the Appendix beginning on page 7 for elaboration on the Rationale for the Lead Communities Project.

Who is Eligible ?

Any central communal entity within a city or metropolitan area (as recognized by the Council of Jewish Federations) with a Jewish population between 15,000 and 300,000 is eligible.

Expectations of a Lead Community

A lead community will:

- enlist top local leadership representing all aspects of the community;

- build a community-wide coalition involving federation, congregations, educational and other institutions;

- mobilize stakeholders from all sectors of the Jewish community in improving programs;

- create programs of educational excellence;

- devise innovative programs, for example, that cross traditional boundaries of age, setting or subject area;

- commit additional financial resources to Jewish education;

- base its programs on a serious planning effort with ongoing monitoring and evaluation;

- show tangible results after several years of intense activity; and

- help other communities benefit from its successes.

In short, a lead community is committed to improving Jewish education and to translating its commitment into action.

CIJE's Role in the Lead Communities Project

CIJE will initiate and coordinate continental supports for the benefit of each lead community. CIJE will:

- identify funders and help obtain financial support;

- offer examples of good programs and experiences through the "Best Practices Project," and help translate them to lead communities;

- provide professional assistance for planning and education;

- develop links to continental resource agencies (e.g., national training institutions, JESNA, JCCA, denominational movements, universities);

- develop a monitoring, evaluation and feedback system;

- provide leadership recruitment assistance; and

- convene lead communities for ongoing seminars during the project.

How to Apply

To be considered a potential lead community, a central communal entity should submit a five to eight (5 - 8) page preliminary proposal to the CIJE. This should include:

A cover letter signed by an authorized representative of the central entity. It should identify a committee to guide the project; indicate the criteria for naming a major communal leader to chair such a committee (or provide a name if a chair has already been identified); and briefly describe the probable size and composition of the projected or actual committee. The letter should also address the issue of probable or actual professional leadership for the project (e.g. do you contemplate a Lead Community Director?).

A 1 or 2 page statistical profile including Jewish population; number of individuals receiving various types of Jewish education, both formal and informal; a listing of Jewish educational agencies and programs, both formal and informal; current spending on Jewish education; and the number and categories of personnel involved in Jewish education.

A 1 or 2 page description of current or recent studies of community needs and resources or plans for Jewish education.

A 1 or 2 page essay making the case for why you think that your community would be an outstanding lead community. The essay can also describe the overall approach to educational improvement that your community might use if selected.

A 1 or 2 page listing of recent community initiatives in Jewish education. Please cite examples of unusually successful programs and innovative efforts in Jewish education already undertaken in your community.

Preliminary proposals must be received by March 31, 1992. Proposals received after that date cannot be considered.

Proposals, preliminary and full, should be typed or printed on letter size paper, double-spaced using a full-size type face and normal margins. Please do not submit appendices or supplemental materials to the preliminary proposal. If reviewers need additional information, they will ask for it. Faxed proposals will not be accepted.

Send two (2) copies of the proposal to:

Council for Initiatives in Jewish Education
c/o Ukeles Associates Inc.
611 Broadway, Suite 505
New York, NY 10012

Review Criteria: Preliminary Proposals

Preliminary proposals will be assessed to confirm eligibility and evaluated using two primary criteria:

- **Community Preparedness.** Is the community positioned to move forward by virtue of its involvement of key institutions and constituencies, leadership, previous planning and improvement efforts in Jewish education?

- **Commitment.** How clearly and convincingly has the community expressed its commitment to the improvement of Jewish education?

The community's record of achievement and its approach to educational improvement also will be taken into account.

CIJE seeks the best proposals, reflecting a range of regions and types of communities.

Full Proposals

If selected as a finalist, a community will be asked to submit a full proposal. Final proposals should include the following elements:

- A 2 to 3 page summary description (or copies of previously prepared documents) that addresses the current view of the educational needs of the community.

- A 2 to 3 page analysis (or copies of previous prepared documents) of the community's capabilities for meeting the commitments outlined in the preliminary proposal.

- A 2 to 3 page summary of the community's record of achievement in Jewish education that describes successful programs, systemic reforms, and innovations that have been introduced.

- A 2 to 3 page description of the community's vision for improving Jewish education. This vision statement should address both formal and informal Jewish education, and approaches for different population groups and educational settings.

- A 2 to 3 page description of the anticipated planning resources that will be committed if the community is selected to be a lead community.

- A preliminary projection of the scale or size of the project (e.g. in dollars) and possible local sources of funding.

Review Criteria: Full Proposals

Full proposals will be evaluated using the same criteria as preliminary proposals, but with greater depth. One additional criterion will be employed: the capacity of the community to carry out its commitment and vision.

?? QUESTIONS AND ANSWERS ??

Teleconference by Satellite

A teleconference by satellite, broadcast throughout the United States and Canada, to answer questions about the Lead Communities Project will be held on February 24, 1992, at 3:00 pm Eastern Standard Time. Any community that intends to submit a proposal or is considering submitting one is urged to participate. The teleconference will start with a brief presentation on the Lead Community Project expectations. Participants will then have the opportunity to address questions directly to CIJE staff and consultants.

Please send the "plan to attend" form by mail or facsimile transmission by February 18, 1992, if you plan to participate in the teleconference. Instructions for arranging to attend a teleconferencing center in your area are provided on a sheet included with these program guidelines.

Questions after February 24, 1992

After the teleconference on February 24, questions may be directed to:

Dr. James Meier
Council for Initiatives in Jewish Education
c/o Ukeles Associates Inc.
611 Broadway, Suite 505
New York, NY 10012

(212) 260-8758 (office)
(212) 260-8760 (fax)

Timetable

Selection Process Timetable

Month	Benchmark
January 31, 1992	Program Guidelines released
February 24	Satellite teleconference
March 31	Preliminary proposals due
April	Review panelists evaluate proposals
May 5	Select finalists
June 30	Finalists submit full proposals
July	Review panelists visit sites
mid-August	Lead communities selected

Lead Communities Timetable

September 1992	Hold initial seminar for lead communities
October	CIJE/community agree on joint program; project begins
October 1992-July 1993	Lead communities develop plan and pilot action program
September 1993	Lead communities begin full-scale implementation of first year program

Appendix

Rationale for Lead Communities Project

Rationale for Lead Communities Project

The Lead Communities Project is a joint continental-local collaboration for excellence in Jewish education. The purpose is to demonstrate that it is possible to significantly improve Jewish education, both formal and informal, in communities in North America with the right

Why a Lead Communities Project

combination of leadership, programs, resources, and planning.

Improving Effectiveness

The heart of this effort is a commitment to help improve the effectiveness of Jewish education in North America.

Jewish education involves not only acquisition of knowledge but also the development of skills, shaping of values and influence of behavior. It can take place in a day school, a supplementary school, summer camp, congregation or Jewish community center; on a trail in the Galilee, in a living room in Iowa or in a setting where young and old learn together. It happens through study of text, a lecture, film, computer or discussion groups or field trips.

However it happens, Jewish education must be compelling -- emotionally, intellectually and spiritually. It must inspire greater numbers of Jews, young and old, to remain engaged, to learn, feel and act in a way that reflects an understanding of and commitment to Jewish values.

To achieve this objective, Jewish education must be nurtured, expanded and vastly improved. Both the CIJE and the lead communities will set goals for " improvement." These will take a concrete form, such as:

■ More and better Jewish education programs and services;

■ Greater participation in Jewish education; and

■ Better outcomes (related to Jewish knowledge, skills, behaviors and values).

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

"Models" as a Strategy for Positive Change

Local efforts that are working well need to be reinforced. Local communities have to be connected to the pockets of excellence across the nation that too often have worked in isolation. Positive change will require a vehicle to encourage inspired approaches and to support innovation and experimentation. This project makes it possible to evaluate, improve and try out a variety of approaches for Jewish education throughout the community, and prepare the groundwork for adoption and expansion of good ideas elsewhere.

Fundamental to the success of this project will be the commitment of the community and its key stakeholders. The community must be willing to set high educational standards, raise additional funding for education, involve all or most of its educational institutions in the program and, thereby, become a model for the rest of the country.

Definition of Community

For the purposes of this project, a " community" is an urban or metropolitan geographic area with a communal organization structure and decision-making system in place. The initial focus is on communities with a Jewish population of 15,000 to 300,000.*

A cornerstone of the Lead Communities Project is the emphasis on the entire local community, rather than the individual school, program or Jewish camp. The evidence is growing in general education as well as Jewish education that lasting educational reform involves the interaction of school, family and community because there is a continuing interplay among them. One needs to affect the entire system, not just a single setting, program or age group.

What Makes a Lead Community

A lead community will be characterized by four areas of community commitment: **leadership, programs, resources,** and **planning.**

Leadership

A lead community is expected to chart a course that others can follow. The most respected rabbis, educators, professionals, scholars and lay leaders will serve on community-wide steering committees to guide the project in a specific community. All sectors of the community -- congregations, schools, community centers and federations -- will need to be involved. Recruiting top community leaders to the cause of Jewish education and involving all sectors of the community will help raise Jewish education to the top of the communal agenda.

Lead community leadership, both professional and lay, also will participate in the ongoing effort to define and refine the project as it is extended to other communities.

The 57 communities within this range account for about 3,500,000 out of about 5.5 million Jews. These figures are based on data from the Council of Jewish Federations.

Programs

Each of the lead communities will engage in the process of redesigning and improving Jewish education through a wide array of intensive programs. The programs of the lead community need to reflect continental as well as local experience and ideas.

Lead communities will benefit from successful experiences across the continent. CIJE is undertaking a systematic effort to identify the best examples of specific programs, projects or institutions in North America, called the " Best Practices Project." In preparing action plans, lead communities will have access to the inventory of the most promising programs.

The report of the Commission on Jewish Education in North America recommends that lead communities concentrate on personnel and broadening community support as critical " enabling options." They are necessary for the significant improvement of Jewish education. A promising programmatic option is study and travel in Israel, which has proven to be a very effective motivator for young and old alike. Thus, personnel, community support and educational travel by youth to Israel will be important ingredients in the community's plan of action.

Local initiatives may include improvement or expansion of existing programs or the creation of new ones. It is anticipated that communities will devise new programs that cross traditional boundaries of age, setting or content. Examples of other programs that could be undertaken, separately or combined in an imaginative way, as part of a lead communities program include:

- Replicating good schools and/or establishing model schools;

- Developing outstanding programs at Jewish community centers;

- Intensifying and improving early childhood programs;

- Designing programs in adult and family education;

- Creating cooperative programs between the community and local college campuses;

- Developing new models of post bar-mitzvah or bat-mitzvah education;

- Developing strategies for outreach;

- Raising the level of Jewish knowledge of communal leaders;

- Integrating formal and informal education (e.g. camping/study programs); and

- Using new technology (video and computers).

Lead community projects are expected to address both scope and quality: they should be comprehensive enough to make an impact on a large segment of the community; and focused enough to ensure standards of excellence.

Financial Resources

A program of breadth, depth and excellence will require new monies, primarily because the endeavor has long been underfunded. The economic recession and substantial resettlement needs make communal fund-raising more challenging. Nevertheless, a lead community will point a direction in this area as well -- substantially upgrading the local investment in Jewish education. Increased funding will come from federations, private foundations, congregations, tuition and other sources.

An important part of CIJE's role is to mobilize private foundations, philanthropists and other continental resources to match the financial efforts of local communities.

Planning

The plan for each lead community will include: an assessment of the state of Jewish education in the community at the present time; an analysis of needs and resources; the development of a strategy and priorities; the design of programs; and the preparation of a multi-year integrated implementation plan for improving educational effectiveness. CIJE can help focus the resources of national agencies -- institutions of higher Jewish learning, religious movements, JCCA, JESNA, and universities -- on the needs of local communities.

How will we know the lead communities have succeeded in creating better outcomes for Jewish education? On what basis will the CIJE encourage other cities to emulate the programs developed in lead communities? Like any innovation, the Lead Communities Project requires evaluation to document its efforts and gauge its success. In addition, each lead community needs to know how well it is doing as a basis for making change along the way. CIJE will design and implement a consistent monitoring, evaluation and feedback system for use in each lead community to help answer these questions.

Lead Communities: A Continental Enterprise

Improving Jewish education throughout the continent is the ultimate goal of the Lead Communities Project: to re-energize Jewish education, and to demonstrate and validate successful approaches to Jewish education that can be found in and replicated by communities throughout North America.

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LEAD COMMUNITIES

A PROJECT OF THE COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

PLANNING GUIDE

February, 1993

A MESSAGE FROM THE CHAIRMAN

The Council for Initiatives in Jewish Education was established as an outgrowth of the Commission on Jewish Education in North America in November 1990.

CIJE brings together distinguished educators, professionals, lay leaders and philanthropists of the continental Jewish community to energize Jewish education in North America. Visions of what should and can be achieved in the 21st century need to be repeatedly placed before our communities' leadership, and the wherewithal to do so obtained. The CIJE can provide a unique blend of individual and institutional advocacy in North America.

The Lead Communities Project is intended to demonstrate that local communities can significantly improve the effectiveness of Jewish education through careful organizing for the task, with a coalition of community institutions, supplemented with continental institutions and resources.

This planning guide has been prepared to assist the lead communities in their work.

Morton L. Mandel

Morton L. Mandel
Chair

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LEAD COMMUNITIES PLANNING GUIDE

"Our goal should be to make it possible for every Jewish person, child or adult, to be exposed to the mystery and romance of Jewish history, to the enthralling insights and special sensitivities of Jewish thought, to the sanctity and symbolism of Jewish existence, and to the power and profundity of Jewish faith. As a motto and declaration of hope, we might adapt the dictum that says, 'They searched from Dan to Beer Sheva and did not find an am ha'aretz!' 'Am ha'aretz,' usually understood as an ignoramus, an illiterate, may for our purposes be redefined as one indifferent to Jewish visions and values, untouched by the drama and majesty of Jewish history, unappreciative of the resourcefulness and resilience of the Jewish community, and unconcerned with Jewish destiny. Education, in its broadest sense, will enable young people to confront the secret of Jewish tenacity and existence, the quality of Torah teaching which fascinates and attracts irresistibly. They will then be able, even eager, to find their place in a creative and constructive Jewish community."

<div align="right">

Professor Isadore Twersky
<u>A Time to Act</u>, p. 19

</div>

"It is clear that there is a core of deeply committed Jews whose very way of life ensures meaningful Jewish continuity from generation to generation. However, there is a much larger segment of the Jewish population which is finding it increasingly difficult to define its future in terms of Jewish values and behavior. The responsibility for developing Jewish identity and instilling a commitment to Judaism for this population now rests primarily with education."

"Recent developments throughout the continent indicate that a climate exists today for bringing about major improvements. However, a massive program will have to be undertaken in order to revitalize Jewish education so that it is capable of performing a pivotal role in the meaningful continuity of the Jewish people."

<div align="right">

A Time to Act, pp. 15 & 16

</div>

Atlanta, Baltimore, and Milwaukee have taken on an exciting challenge and an awesome responsibility: to dramatically improve Jewish education throughout their communities, and in the process, to serve as beacons in this endeavor for others in North America. These "lead communities" will provide a leadership function for others in communities throughout the continent. Their purpose is to serve as laboratories in which to discover the educational practices and policies that work best. They will function as the testing places for "best practices" -- exemplary or excellent programs -- in all fields of Jewish education.

INTRODUCTION

This set of guidelines has the luxury and the challenge of preaching to the converted. Jewish communities understand and have been engaged in planning for a long time. The lead communities more than many others have made pioneering efforts in planning for Jewish education and continuity. Despite that advantage, all of us are acutely aware of the limitations in the available information and the magnitude of the task of setting out a plan that addresses the challenges of the Lead Communities Project.

The purposes of these guidelines are to:

■ offer approaches, methods, data collection instruments and other tools to use in the planning process, and

■ give some measure of uniformity to the planning process that each of the lead communities will engage in.

Each community will, of course, need to tailor these guidelines to its own circumstances.

As a general principle the object is to build upon the work and the research that has already been done in each community and use those as a point of departure for the Lead Communities Project. On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.

CIJE will serve as a resource and clearinghouse for lead communities as they proceed through the planning process: offering expertise, recommendations on methods or information collection instruments, linkages to national organizations, and a means by which the communities can share their approaches with each other.

I. FIRST STEPS

"Fundamental to the success of the lead communities will be the commitment of the community and its key stakeholders to this endeavor. The community must be willing to set high educational standards, raise additional funding for education, involve all or most of its educational institutions in the program, and thereby become a model for the rest of the country. Because the initiative will come from the community itself, this will be a "bottom-up" rather than a "top-down" effort."

<div align="right">A Time to Act, p. 68</div>

Rationale

First steps refer to preparations, to allow for smooth sailing once the serious work gets underway.

Major Activity Areas

There are two major areas for attention:

1. Initial mobilization of leadership (lay, educators, rabbis and professionals)
2. Introducing the idea into the community

Building a "wall-to-wall coalition" of all key actors in the community who have a stake in Jewish education is an important initial step of the Lead Communities Project. A widening net of stakeholder involvement in Jewish education is one of our instruments for engaging a larger portion of the Jewish community. The mobilization of leadership is a pivotal element for achieving that objective.

The first issue is to identify and recruit core leadership to spearhead the lead communities effort, while devising a structure that allows a broad cross-section of the community to become actively engaged in the project. The leadership therefore must be carefully selected (lead communities may want to contact CIJE staff or board members for help in recruiting key people), and the structure must allow ample opportunity for constituents to obtain a stake in the process. Box 1, Concentric Circles of Leadership, suggests a possible framework for organizing the project.

Tasks

1. Identify and recruit key leadership, including:

   ■ Chair

- Lay leaders
- Major donors
- Educators
- Rabbis
- Other professionals

2. Establish the Lead Community Commission, composed with representation that includes top leadership from each of these groups and that reflects the broad spectrum of the community. E.g., leadership from:

- Federation
- Formal educational settings
    - schools
    - synagogues
- Informal educational settings
    - JCCs
    - camps
- Communal agencies and organizations dealing with education

Box 1: Concentric Circles of Leadership

One way to organize to reconcile the dual objectives of strong and thoughtful leadership coupled with wide involvement is to develop expanding circles of leadership. For example:

• Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.

• Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.

• Task Forces, to address substantive issues and make recommendations to the full Commission, and/or to monitor and evaluate projects once they begin operations (see below.)

• Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

- Compile packets of background information and distribute to each of the committee members. Box 2 contains a selection of materials that may be useful for this purpose.

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│  Box 2:  Examples of Background Materials                             │
│  ┌─────────────────────────────────────────────────────────────────┐ │
│  │                                                                   │ │
│  │  •  A Time To Act                                                 │ │
│  │                                                                   │ │
│  │  •  Previous planning documents, particularly on Jewish education │ │
│  │     or continuity, prepared by your community.                    │ │
│  │                                                                   │ │
│  │  •  Other studies and documents relating to the community's       │ │
│  │     educational systems.                                          │ │
│  │                                                                   │ │
│  │  •  Summary of most recent Jewish population study for your        │ │
│  │     community.                                                     │ │
│  │                                                                   │ │
│  │  •  CIJE project descriptions                                     │ │
│  │                                                                   │ │
│  │        o  "Best Practices"                                        │ │
│  │                                                                   │ │
│  │        o  Monitoring, Evaluation and Feedback                     │ │
│  │                                                                   │ │
│  │        o  Goals Project                                           │ │
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3. Convene Commission

   ■ Establish a detailed timetable for the project by working backward from the year one end date, as well as forward based on the amount of time work components will require.

   Working with the chairperson of the committee, establish a schedule of committee meetings all the way through the first year of planning. Scan major Jewish and national holidays for conflicts. (See Box 3 for an illustrative schedule of steps.)

   ■ Prepare a tentative agenda for the first committee meeting to review with the chair.

Box 3: Illustrative Planning Framework

Phase	Deliverable	Commission Meeting Subject

1. Start-up	• Form Commission
	  - Discuss the idea
	  - Detailed workplan
	  - Agree on mandate
	• Form committees
		1a. Review of project key ideas, aims and structures
		1b. Review of workplan: Key methods and projects
		  - Best Practices
		  - dealing with goals
		  - Monitoring evaluation feedback project
		1c. Develop charge to committees: main thrusts:
		  - personnel
		  - community mobilization

2. Start Self-study (ongoing)	• Design scheme • Profile of Jewish education: strengths and weaknesses • Survey of educators in the community • Report on findings	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	• Formulate issues	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	• Draft community mission statement	4. Approve mission/vision statement
5. Strategies and Priorities for Action	• List of recommendations for each major area (personnel, community mobilization, Israel experience) with priority rankings and priority sequencing	5. Recommendations on priorities
6. Programs	• Confer with CIJE, Best Practices • Draft guidelines • Define program priority areas and new initiatives • Issue call for program implementation proposals	6. Define program priorities
7. Resource Development	• Fundraising plan (e.g., potential donors, strategies, targets, CIJE assistance, timetable)	7. Approve and agree on assignments for carrying out plan.
8. Subsequent year action plan	• Draft budget with resource objectives • Compile summaries of program options • Prepare first year implementation plan	8a. Select programs for next year 8b. Approve overall implementation plan 8c. Set resources objectives ($)

4. Devise task force structure

It is helpful to organize task forces to address substantive issues and make recommendations to the full commission. Once pilot operations begin, the role of these committees can be modified to monitor and evaluate projects they have initiated.

There are several ways of organizing task forces. Here are some samples:

■ Main thrusts of the recommendations of the Commission on Jewish Education in North America
  o personnel
  o community mobilization
  o research/self-study
  o Israel experience

■ Delivery settings, e.g.:
  o day schools
  o supplementary schools
  o programs in informal settings

■ Functional, the classic "Board of Directors" model, e.g.:
  o pilot projects
  o best practices
  o goals/visions of Jewish education
  o monitoring and evaluation
  o fundraising
  o coalition building and marketing/networking
  o educator's survey
  o five year planning

Issues to consider in deciding on the most effective approach for organizing include:

■ Energizing: Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.

■ Priorities: Do the topics represent articulated, or likely, priority areas of the Lead Communities Project.

■ Content expertise: How do staff knowledge and other resource experts relate to the potential topics? Do any of the organizing approaches make better use of available human resources?

■ Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.

The time and commitment of top lay leaders to serve as chairs, and the depth of capable professionals to service the task forces are factors to consider in deciding on the number of committees.

II. SELF-STUDY

> "[An important step in mobilizing is...] *to review the current state of Jewish education in its various aspects. This will provide the basis for analyzing the problems, considering the achievements and shortcomings, and determining where the most promising opportunities for improvement might lie.*"

<div align="right">A Time to Act, p. 31</div>

Rationale

Obtaining reliable information about something as complex as a community's educational system is an ongoing endeavor. Its payoffs are immediate, long-term, and continuous: as the community learns more about itself, its decision making will improve. Over time, the process will yield better and better quantitative and qualitative data about what exists in the community's Jewish education system, how good it is, what people in the community want, what more is needed and what works better.

Lead communities can offer leadership in this area too, developing means, methods and experience for an ongoing process of serious self-study. Hopefully, the tools developed in lead communities will be disseminated for other communities to adopt and adapt. CIJE is a resource for designing and carrying out the self-study, as well as for disseminating findings and new products.

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

The self-study process is an ongoing one; it will not be completed within the first year of the project. It is proposed that during the first year of the project the self-study include the following 3 elements:

1. A *profile* of the Jewish education enterprise in the community, including the following:

   - Participation (absolute numbers, rates and trends)
   - Inventory of personnel, programs, institutions, organizations
   - Program resources
   - Financial resources

2. A *needs analysis* to focus during the first year on personnel-related issues, a central part of which will be an educator's survey.

---

3. A *follow-on agenda* for continuing analysis during years 2-5.

1. **Profile**

a. Develop demographic profile of Jewish education needs in the community.

■ Jewish population characteristics: cohort sizes (e.g., early childhood, school age lay leaders, adult education learners, college-age youth, other special groups, like mixed married couples)

b. Develop inventory of program capacities and participation rates (formal and informal programs) including:

■ A profile of the institutional resources, programs and services presently available in the community.

■ Present enrollments and participation rates (i.e., percent of group attending), and recent enrollment/participation trends.

■ Estimate of the capacity of each program if it is not being fully utilized.

(See Box 4 for categories of information to describe each program area.)

c. Develop profile of present Jewish education personnel by drawing on available data. (Note: knowledge of educator strengths and needs will be enriched as returns on the educator's survey, discussed below, are compiled.)

■ Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood, camps counselors, JCC program staff, other informal education personnel) by institution/program

■ Employment status (full-time, part-time) and years of service (e.g. in current position, in Jewish education in community)

■ Qualifications, skills, expertise and background

■ Salary and benefit levels

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┌─────────────────────────────────────────────────────────────────┐
│ Box 4:  Elements of an Institution or Program Profile            │
├─────────────────────────────────────────────────────────────────┤
│ • Organizational:                                                │
│       o   type of institution, program (e.g., day school, camp,  │
│           retreat center, etc.)                                  │
│       o   denominational affiliation                             │
│                                                                  │
│ • Students:                                                      │
│       o   enrollment and graduation trends                       │
│       o   age range                                              │
│                                                                  │
│ • Educators:                                                     │
│       o   numbers of full- and part-time                         │
│       o   areas of expertise                                     │
│       o   qualifications                                         │
│       o   turnover/retention rates                               │
│                                                                  │
│ • Program components:                                            │
│       o   subjects                                               │
│       o   degree(s) offered                                      │
│       o   in-service staff development                           │
│       o   activity duration                                      │
│       o   methods                                                │
│       o   support resources (e.g. library, training) and         │
│           services                                               │
│                                                                  │
│ • Finances                                                       │
│       o   cost per unit of service                               │
│       o   revenue and expenditure trends                         │
│       o   major sources of revenue                               │
└─────────────────────────────────────────────────────────────────┘
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d. Summarize community expenditure levels for major categories of services. E.g.:

- Central agency
- Day schools
- Supplementary schools
- JCC education services
- Camps

2. Needs Analysis

A needs analysis identifies unserved and underserved needs for Jewish education. It will include:

- Educator's survey

- Market analysis: selected client/consumer groups
- Assessment of quality

Educators' Survey

Given the critical importance of personnel in Jewish education and its centrality in the Lead Communities Project, an educators' survey should be an early and major component of the needs analysis. While the first round presentation of the community profile of Jewish education (see above) will compile presently available information on personnel, there are likely to be large gaps. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 5 contains ideas for areas to cover in a survey of Jewish education personnel. Adapting or building upon educator surveys undertaken in recent years by other communities is also recommended. Communities may contact CIJE for assistance in identifying useful prototypes.

Make sure to involve experienced social scientists, and educators from formal and informal settings in the design and implementation of the survey. Involving people from the field will improve the quality of the data elements selected, help avoid time and resource consuming efforts to obtain unavailable information, help pave the way when it comes time to collect data, and help mobilize educators to support the overall objectives of the commission.

Summarizing, the initial thinking about the educator's survey should take several factors into account:

- Purpose of the survey: E.g.
   o to provide detailed profile of personnel characteristics
   o to understand personnel strengths, weaknesses and needs (e.g. qualifications, turnover, shortage areas)
   o to establish a database for future comparisons

- Potential uses, outcomes. E.g.:
   o to identify in-services training needs
   o to understand the structure of employment (is most of the work force very much part-time, vocational, or avocational, reasonably well paid, or not)
   o to identify priorities for recruitment

- Categories of Information: What information is desired (see Box 4)

- Database: Allow for growth, in number of information fields as well as in number of records

- Involve educators from formal and informal settings

- Select survey director, or researcher with requisite expertise. In selecting staff, or

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contracting with a researcher, thoroughly review assignments, expectations and workplans

In view of the importance, complexity, and ongoing nature of this aspect of the lead community effort, it may be advisable to convene a special task force (if such a task force was not built into the organizing framework) to oversee this phase of work.

Box 5: Educators' Survey: Possible Categories for Inventory (Illustrative only)

• Demographic profile (e.g., sex, age, marital status, address)

• Affiliation

• Jewish education background (e.g., degrees, licensure, courses and programs)

• In-service staff development (subjects, scope and level)

• Work history

• Jewish education work experience (e.g., years of experience, present and recent positions, full-time and part-time weekly hours; camp, other summer and other part-time jobs)

• Secular education positions

• Salary history, in Jewish education

• Inventory of formal and informal expertise (e.g., Judaic/Hebrew; age level specializations; teacher training, resource room management, special education; organizing, supervisory or administrative skills). Classifiable as:

     ○ Areas of knowledge
     ○ Skills
     ○ Special talents

• Attitudinal questions (e.g., Jewish education career intentions; job satisfaction and priority concerns)

Market Analysis

A market analysis attempts to quantify the unmet demand among different client groups for various Jewish education services/programs, and the potential pool of consumers who might participate if programs were made attractive enough to them.

Unmet demand, conceptually at least, is relatively straightforward: the difference between those who seek to participate in a program or service, and the available openings. Quantifying the potential pool is somewhat more complex. At the largest extreme it quantifies everyone in the consumer group, or cohort. The portion of the group likely to participate, however, will be affected by many factors, such as improvements in personnel and community mobilization -- the enabling options which are central to the success of this endeavor. Therefore, the market analysis should also seek insights on tactics to mobilize new segments of the community, and methods to recruit new people to participate in the enterprise of Jewish education.

Client Sub-groups: Jewish education takes place in formal and informal settings from infancy to grandparenting. There are no easy answers to the question of which (or whether any) sub-group or stage in life is the best one to start focusing attention and resources on. Therefore, with respect to potential client groups, two important issues should be articulated and addressed up-front:

1. Targeting: which client sub-group should be studied first?

2. Measures of Need: what is the appropriate definition of need?

Targeting: The first step is to select the key consumer groups, in addition to Jewish education professionals, to be the focus of research during the first round. One construct of categories from which to select client sub-groups is:

- Early childhood
- Ages 5-13
- Post Bar/Bat Mitzvah
- College age
- Parents of young children
- Singles
- Empty nesters
- Older adults

Given limited resources, it may make sense to fine tune the targeting still further by looking at specific age groups in particular program areas, for example, Israel programs for teens.

> **Box 6: Targeting**
>
> Several criteria can be applied in making decisions about what information or which groups to target in the needs analysis.
>
> • **Present knowledge:** How much is already known about the topic or the needs of the group? Has the issue or group previously been studied? Are there significant open questions about what the needs are or how they should be addressed?
>
> • **Priority:** How high a priority is the topic or sub-group with respect to Jewish education? Are the needs of this group for Jewish education a major issue or concern in the community?
>
> • **Scope:** Is the scope of its impact (for example because of size or centrality) likely to be large?
>
> • **Feasibility:** What resources of time, effort, money are needed to answer the open questions? For example, does available personnel have the expertise to design and carry out the study? Are data collection instruments available in the community or elsewhere that can be adapted?

Measures of Need: There are three conceptual ways of considering need:

a. "Market:" *Actual* demand by a defined set of people.

b. "Standard:" A measure of how much people require, or, from the community perspective, what is needed to realize a set of aspirations.

c. "Receptivity:" What people might *potentially* respond to, i.e. "buy", but cannot articulate because it is not within their past experience.

In designing the needs analysis, you must decide which measure or measures will be most useful for each subgroup. The CIJE's "Goals Project" and its "Best Practices" project may help reveal valuable insights which will help communities define appropriate measures. The criteria for targeting will be helpful in narrowing the measures as well (see also Box 6).

Here are some other considerations to bear in mind in deciding how to measure need:

• **Market** measures are most appropriate when the institutions of the community are relatively powerless to design incentives or exercise leverage to influence individual choices, other than by improving the programs that are offered.

• Conversely, **standards** will be appropriate when community institutions are in a position to offer incentives or exercise leverage, and have a clear and definable stake in the outcomes of the service area. The caliber and training of professionals is one case in point. Another example is the quality of the curriculum.

• In a needs analysis it is virtually impossible to "measure" **receptivity**, for example to a charismatic teacher or leader, to an effective new recruitment strategy, or to a climate that has been transformed by the involvement and participation of new actors and stakeholders. It is possible to examine programs that have been successful elsewhere to expand the vision of decision makers, particularly when it comes time to elicit or develop program strategies. In the context of the needs analysis, it is useful to ponder more ambitious alternatives when the expressed needs aspire to a low level.

Measures of Resources: Potential "needs" should be compared to available resources to identify areas of unmet need or "gaps". At the most basic level, a profile of educational resources should include:

■ Data on the numbers of programs, by type, their capacities (in terms of openings, places) and actual enrollments

■ Data on numbers of personnel (reprise from profile or survey) qualified for different program types -- as a measure of shortages or capacity to serve more participants

■ Utilization of space

■ Levels of funding

■ Anticipated changes (including resources in the pipeline, such as new programs being planned or anticipated cutbacks)

Measures of Quality

Ideally, a profile of resources should also incorporate assessments of their *quality*. For example, while a community may appear to have enough supplementary school programs, the more crucial issue is how good are they?

The quality of programs is generally measured by assessment of levels of achievement, or measures of performance. The task in Jewish education is substantially more difficult because of the paucity of satisfactory tests of knowledge or achievement, and the complexity of defining a set of generally acceptable standards. For these reasons, in the short run at least it makes sense to rely on "surrogate" measures of performance. For example, attendance and longevity/dropout statistics can be enlightening as indicators of changes in student performance. At the same time, lead communities may spearhead efforts to develop more direct measures of student performance. In undertaking developmental work of this sort, communities may want to draw upon the expertise of national organizations (e.g., CAJE, CJF, CLAL, JESNA, JCCA) and national training institutions with whom CIJE has developed partnerships.

If enrollment or attendance is low, or dropoff at age 13 is high, is it because the prospective students are not out there, no effort is made to recruit, the programs are poorly designed or because effort is needed to increase parental support? Information on the quality and effectiveness of programs is important for identifying strengths and weaknesses of the existing system, for developing strategies for improvement, and ultimately for establishing a baseline against which the impact of future efforts can be measured.

Regardless, the difficult in measuring quality dictates that in this area especially several iterations of study are necessary. Findings and gaps uncovered in one round define the task for the next round, as the community's efforts to better evaluate, collect information and conduct surveys are implemented, and bear fruit.

Generally speaking, three types of measures can be used: (1) input, (2) output or performance, and (3) outcomes. See Box 8 for examples of measures to consider. If you find an absence of information on effectiveness -- that, in itself, may suggest that critical issues for the community will be: How should programs be evaluated and against what criteria? What are the characteristics of an excellent educational program? Should there be a process for setting community standards and "accrediting" programs? Should there be an effort to develop community-wide performance indicators and what should they be?

Box 8: Illustrative Measures of Quality and Effectiveness

• **Measures of inputs** are generally the easiest to obtain. Examples include: per capita expenditures for various age cohorts and programs, teacher/student ratios, average teacher salaries, per cent of teachers with advanced degrees, lay involvement, number of teachers participating in in-service training, curriculum units developed and introduced, increases/decreases in educator/participant contact hours, and etc. Comparisons can be made to provide perspective on where the community stands in relation to other communities and the nation on key indicators.

• Examples of **output or performance measures** include per cent of eligible population participating in formal and informal Jewish education by age group, levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, etc. Methods of collecting this information include sample surveys, questionnaires to program directors, focus groups (for satisfaction), self-studies by schools, alumni surveys, data collected by a central body such as the Board of Jewish Education or Federation, and information collected in recent Jewish population studies.

• **Outcomes** are the most difficult to measure. It is useful to articulate what these might be, even if the data is not available, because it will be helpful in developing the mission statement later on as well as for suggesting lines of future research. Examples of outcome measures would be self-definition and commitment to Jewish identity, values and practices; evidence of transmission of Jewishness to the next generation; affiliation with synagogues, communal organizations, support of Israel and Jewish institutions, etc.

Community Mobilization: Through the very process of moving forward as a lead community and of engaging in the market analysis, findings will surface about the strengths and shortcomings on the awareness, involvement and commitment of various sectors of the community about Jewish education programs and commission initiatives. Examples of areas of potential attention include:

■ Communication and collaboration between program professionals and rabbis

■ Involvement of teachers, educators in informal settings in articulating problems and solutions

■ The size (and growth) of the cadre of committed and supportive lay leaders, parents and/or donors

■ The presence (or absence) of regular publicity/information announcements about Jewish education programs, performances, or initiatives (e.g. columns in the local Jewish newspapers, community program catalogues, regular flyers, etc.)

These findings should be documented as part of the market analysis so that recommendations can be put forward to further mobilization of the community.

Summary of Benchmarks/Tasks

1. Design Needs Analysis

   a. <u>Focus:</u> Select the primary element, issue or program to be studied

   b. <u>Measures:</u> Decide on the method(s) for measuring the needs (see Box 8)

   c. <u>Develop Concept Scheme:</u> Layout decisions on design for discussion with commission

2. Collect Information: on present participation levels

3. Estimate Community Need/Demand

4. Gaps [3 minus 2]: a comparison of the market demand for the present programs will give an estimate of the unmet needs: who are the "unserved" or "underserved" groups in the community from the point of view of adult Jewish education?

5. Qualitative Analysis: compile findings on problems, and limitations on program quality or effectiveness and recommendations for improvement

6. Community Mobilization Impacts: compile findings and recommendations on recruitment and deeper involvement of students, personnel, leadership, parents and other stakeholders

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Box 9: Methods

Defining Potential Markets: Four types of information can be used to identify the needs of user groups. As a rule, malleable methods should be employed because no single method will give a full picture of participation levels, and the quantitative and qualitative limitations in the programs available for different groups.

• Available demographic studies and data: enrollment trends, statistics on personnel involved in Jewish education and communal affairs (e.g., full-time, part-time, turnover, longevity ...), enrollment trends in local day and supplemental school programs (as a predictor of future personnel demands).

• Other national and local studies, commission and planning reports: such as the report of the Commission on Jewish Education in North America, local reports of task forces on Jewish continuity, and strategic planning reports that give insights on trends or external forces that will impact on needs. Experience in other cities can be analyzed for possible relevance. Opportunities for program modification or expansion will be identified where substantial unmet needs are documented and where new revenue opportunities appear to exist.

• Discussion or Focus groups: with selected consumer groups (such as day and supplementary school educators, synagogue lay leaders, students) to gain insights on access barriers as well as desires.

• Questionnaires: attitude surveys of selected sectors of the Jewish community: e.g. about student career interests; motivations for participating in specific program; views of institutional or program strengths or weaknesses; perceptions of their own needs or desires for Jewish education; and past and anticipated involvement in Jewish affairs.

Identify a variety of submarkets. Attempt to estimate the size of each submarket, the extent of the need and the competition.

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3. Follow-on Agenda

Given the magnitude, complexity and the high stakes connected to developing the Lead Communities Project, self study should be on-going -- not a one-shot effort. Findings on one issue inevitably will raise more sophisticated questions. Moreover, limits on time and resources, information availability, and research capability dictate that the process be phased over a period of several years. The lead community will need to decide which parts of the self study to begin the first year, and which to postpone to later years.

Consequently, the objective should be to develop a design for years 2 through 5 for further data collection, in-depth studies in personnel, refinement of community mobilization efforts, and development of assessment instruments to better measure quality of formal and

informal Jewish education programs (for example, achievement measures to test knowledge of supplementary school students).

III. CRITICAL ISSUES

> *"The Jews of North America live in an open society that presents an unprecedented range of opportunities and choices. This extraordinary environment confronts us with what is proving to be an historic dilemma: while we cherish our freedom as individuals to explore new horizons, we recognize that this very freedom poses a dramatic challenge to the future of the Jewish way of life. The Jewish community must meet the challenge at a time when young people are not sure of their roots in the past or of their identity in the future. There is an urgent need to explore all possible ways to ensure that Jews maintain and strengthen the commitments that are central to Judaism."*

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A Time to Act, p. 25-26

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Rationale

In charting future directions, any community faces a number of important policy choices: i.e., critical issues. Early discussions of the planning committee are the first step in identifying the critical issues in personnel and community mobilization. Findings emerging through the on-going self study, including information on educators, areas of needs in mobilizing the community, and program strengths and weaknesses, will help sort out and clarify the fundamental decisions.

Deliverables:

- Explicit assumptions
- Formulation of critical issues
- Document summarizing consensus of committee on each critical issue

Benchmarks and Methods

1. Assumptions: In designing the best possible system for coordinating and supporting Jewish education, there will be several fundamental "givens" (e.g., overcoming shortages in qualified Jewish education personnel will require a systemic action in many areas, not just a single program). These assumptions should be made explicit to ensure agreement by the commission. Assumptions on which there is not consensus may well become "issues" which the committee must address (see Box 10 for sample assumptions).

> **Box 10: Sample Assumptions**
>
> 1. Shortages in qualified Jewish education personnel will not be satisfactorily overcome until a series of systemic problems in the profession are addressed (e.g., salaries, training, career opportunities, empowerment in decision making) -- not just one element.
>
> 2. Talented young adults can be enticed to enter careers in Jewish education if major communal leaders (lay, rabbis, educators, professionals) take an <u>active</u> role in the recruitment process.
>
> 3. Significant levels of increased funding for Jewish education will not materialize if community leaders are not included early in the planning and decision on actions.
>
> 4. Jewish education has a more powerful impact on students when formal and informal experiences are linked.
>
> 5. The delivery system needs to offer an opportunity for balance (creative tension) between community-wide perspectives and the perspectives of the religious movements (Reform, Conservative, Reconstructionist and Orthodox).

2. <u>Critical Issues</u>: The most important choices on enabling options faced by the community must be defined and resolved in order to set priorities in Jewish education. The planning committee will attempt to reach agreement on what the important questions regarding personnel, community mobilization, and future investment in Jewish education throughout the community.

The selection of the critical choices is as important as the commission's decisions on their resolution. Omission of, or "papering over," a burning issue is likely to exacerbate future discord and confusion in the community. On the other hand, the omission may choose to table for the present a particular issue on which it is unable to achieve resolution. By this means it acknowledges recognition of an important problem and its intention to return to it.

Because the formulation of the critical issues is pivotal to the development of the mission and the rest of the planning process, you are urged to confer with CIJE and tap its resources. As with other parts of the process, CIJE will facilitate sharing experience with the other lead communities.

In defining and organizing choices, it may be useful to classify issues in cascading categories that proceed from more philosophic (i.e., mission) toward more operational (i.e., programmatic or organizational). (See Box 11 for types of issues.)

Box 11:	Classification of Issues

1. Mission-level issues -- i.e. choices relating to the vision, philosophy and the role of the community in initiating or supporting the emerging needs.

2. Policy issues -- i.e. choices relating to the broad policies relevant to carrying out the community's mission. Some of these choices relate to professional development (e.g. the balance between in-service and pre-service training for pre-school teachers); recruitment (e.g. the balance between new entrants into the field, continuing education; re-training people from other fields); and community mobilization (e.g., the trade-offs between early action to create a sense of community support, versus the slower process of involvement of stakeholders in planning to build ownership).

3. Standards and Program Issues -- choices relating to the content and level of programming in Jewish education (e.g. what form of in-service training: mentoring program, workshops and course offerings, personalized growth plan for each educator, some of each, or what kind of staff development incentive plan: completion bonus, waived fees, contractual requirement).

4. Resource and organization Issues -- i.e. choices relating to the present or, more importantly, future capacity of the community to support mission and policies (e.g. the financial resources, agency roles, possible coordinative and integrative mechanisms). Stated differently, which actors, agents, or agencies will be/must be responsive to change on its Jewish education agenda.

IV. MISSION OR VISION STATEMENT

"Jewish education must find a way to transmit the essence of what Jewish life is all about, so that future generations of Jews will be impelled to search for meaning through their own rich traditions and institutions. Judaism must be presented as a living entity which gives the Jews of today the resources to find answers to the fundamental questions of life as readily as it did for our ancestors through the centuries."

A Time to Act, P. 27

Rationale

The heart of a strategic plan is a mission (or vision) statement, which should project a clear view of the aspirations of the community. The mission statement for the lead community should project a self-image of the community in relation to the enabling options for Jewish education. A good mission statement not only suggests what the community wants to accomplish but what it does not seek to accomplish; at the broadest level, it identifies whom it seeks to serve and how.

The mission statement is the result of a process that includes deliberation by and consultation with a broad cross section of the community -- lay leaders, scholars, rabbis, educators and communal professionals, parents and other stakeholders.

Deliverable

A concise mission statement.

Benchmarks and Methods

Because of its importance, and the difficulty of crafting a good one, the mission statement needs to be the product of substantial analysis and discussion; it should be prepared in the middle of the planning process, not at the beginning. The CIJE goals project may be of help to communities as they formulate missions.

It should represent the resolution of mission-level critical issues and frame a broad response to the needs assessment. Some parts of the mission statement are not likely to be very controversial; others might be. It is helpful to identify the major options in relation to each critical issue as a framework for the key discussion at which the mission statement gets formulated (see illustration in Box 12 below):

Box 12: Illustrative Mission/Options Chart			
CRITICAL ISSUES	OPTION A	OPTION B	OPTION C
1.0 Depth or breadth in near term (i.e. next 1-1/2 years) new programs for personnel	Resources should be targeted on one key group of Jewish educators, such as senior educators in schools and informal settings	Programs should be designed to impact on all categories more or less equally of Jewish educators	Every Jewish educator should some benefit from a new program, however, at least xx% of the total new resources should be targeted to a single group
2.0 Priority for leadership training recruitment	Senior leaders should be recruited	Promising young talent, future leaders, should be recruited	Placement in programs based on motivation and self selection, on a first come first served basis
3.0 Community posture on an Israel experience for young people	Community responsibility to insure that every young person has an Israel experience opportunity	Joint community-congregation-family responsibility to insure that every young person has an Israel experience opportunity	Community responsibility to insure that xx% of young people have an Israel experience opportunity

V. SETTING STRATEGIES AND PRIORITIES

"... the needs of education have seemed to be less urgent, less insistent, more diffused [than other issues]; a problem that could be dealt with at some point in the future when more pressing problems have been solved. This is an illusion. ... we can no longer postpone addressing the needs of Jewish education, lest we face an irreversible decline in the vitality of the Jewish people."

A Time to Act, p. 28

Rationale

The purpose of this part of the planning process is to insure that Jewish communal resources available for Jewish education are directed to the lead community's needs and mission. This is accomplished by selecting effective strategies or policies, and. setting appropriate priorities.

The policies in the plan represent resolutions of the critical issues identified above. Resolution of an issue need not strictly adhere to the alternatives that were considered when the issue was defined. It may combine elements of several choices or be an alternative not previously thought of.

Establishing priorities for any community is extremely difficult: first, because of the large number of programmatic options it would be desirable to undertake to increase community support or to build the Jewish education profession (e.g., increase salaries, upgrade senior educators, recruit new talent, expand training programs, open a resource center, develop a mentoring program, etc.); and second, because of the multiplicity of constituencies, and their differing values. A particular educational service may be very important to one group and unimportant to another. The challenge is to develop an approach in which all important views are heard, and then strategies and priorities are developed to insure that the community does not scatter its limited resources.

"Priorities" are seen as judgments about relative importance that inform decisions about use of non-fiscal resources (such as leadership and staff of community agencies), resource development (such as foundation and endowment development), as well as dollar allocation decisions in the budgeting process.

Deliverables

- List of policy recommendations for the improvement of community mobilization

- Recommended priority rank and desirable sequence for each recommendation

- List of criteria used to select and rank policy recommendations

Benchmarks and Methods

Good methods of priority analysis inform and support human judgment, but do not try to supplant it; formulas or mechanical weighing or scoring methods are typically not useful.

Options are the items to be ranked in setting priorities for improving personnel and mobilizing the community. In other words, an "option" is a direction, service, or new initiative that is a potential recipient or user of a commission resource. An options structure is an organized, systematic listing of all the possible options. The decision as to what to list as an option is an absolutely crucial one; for once that decision is made, it defines what gets ranked in priority-setting.

A good structure for priority-setting should help decision makers connect broad concerns with specific services or programs -- both those that exist as well as those program or services that do not, but that reflect community concerns.

There are three sources of criteria relevant to setting priorities among options:

- Criteria that are suggested by analyses of community needs in other areas. Other things being equal, one would tend to give priority to settings where the total needs are very large (e.g. personnel for supplementary schools) or where the gap between existing and needed services is the largest (e.g. in-service education).

- Criteria that derive from the community's mission statement.

- Criteria that derive from continental experience in planning for Jewish education. CIJE may be able to provide assistance in this area.

Sample criteria for the selection of effective strategies (policies) and priorities are illustrated in Box 13.

> **Box 13:   Sample Criteria for Selecting Strategies and Priorities**
>
> • Supports professionalization of principals, teachers, and educators in informal settings -- including incentives for higher levels of education.
>
> • Broadens lay leader involvement and support of Jewish education.
>
> • Maximizes effective utilization of resources (minimize duplication).
>
> • Maximizes the opportunity to integrate formal and informal educational techniques (e.g., family shabbatonim; camping + study programs; Israel study programs).
>
> • Incorporates principles and methods that work, as documented by CIJE's "Best Practices" project.

VI. DESIGNING PROGRAMS/PILOT PROJECTS

> "Jewish education must be compelling -- emotionally, intellectually, and spiritually -- so that Jews, young and old, will say to themselves: 'I have decided to remain engaged, to continue to investigate and grapple with these ideas, and to choose an appropriate way of life.' "

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A Time to Act, p. 26

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Expanded, modified, and new programs of course are the most tangible part of the effort to improve Jewish education throughout the community. In the context of a lead community, they are important not just for the promise they hold to improve the enterprise, but also because they can serve as visible demonstrations that help attract larger circles of adherents.

The recent history of Jewish education, as with many other enterprises, contains instances of programs hastily put together to address frustrating problems. Here we hope to shift the emphasis toward the tried, proven and planned. "Best Practices," a CIJE project that is documenting successful programs throughout the continent and organizing them in a variety of categories, should be immensely helpful here. "Best Practice" programs are being classified in six areas:

- Supplementary schools
- Early childhood Jewish education
- JCCs
- Israel experience
- Day schools
- Jewish camping

The "Best Practices" project is now developing a method by which lead community planners and educators can learn from the best practices it has document and begin to introduce adaptations of those ideas into their own communities. This can occur through a wide range of activities including: site visits by lead community planners to observe best practices in action; visits by best practice practitioners to lead communities; workshops with educators in lead communities, etc.

We envision programs being launched in two stages: first a few pilot projects to get started; and a subsequent series of programs reflecting the vision and priorities of the Commission.

Pilot Projects

A community may wish to launch a small number of pilot programs early in the process to begin getting results, to test ideas about which it has a reasonably high level of confidence of success, to gain visibility for its lead community project, and to mobilize the community and

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create a sense of excitement. Programs selected as pilot should be ones which are likely to be consistent with long term directions, or likely to show results in a short period of time. Box 15 contains sample criteria for use in selecting pilot projects.

Selecting pilot projects that address high priority enabling options -- namely personnel and community mobilization -- is another way of helping to ensure the viability of the effort. Sample pilot programs are listed in Box 16.

Box 15: Sample Criteria for Pilot Project Selection

• Improves the profession (teachers, principals, and informal educators)

• High visibility -- likely to reinforce community mobilization efforts (e.g. catalyze stakeholder support)

• Maximizes the opportunity to replicate good results from other communities (e.g., via "Best Practices")

• Promotes multi-agency programming and cooperation

• Draws upon the resources and expertise of national training organizations (i.e., via CIJE partnerships)

• Can feasibly be implemented quickly

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│  Box 16:  Sample Ideas for Pilot Projects                        │
│                                                                   │
│  Personnel                                                        │
│                                                                   │
│  • In-service training for educational leadership -- school       │
│  principals and JCC program directors.                            │
│                                                                   │
│  • In-service training for 2 teachers and 2 informal educators    │
│  from each institution.                                           │
│                                                                   │
│  • Summer seminar in Israel for selected educators                │
│                                                                   │
│  Community Mobilization                                           │
│                                                                   │
│  • Leadership training program for congregational and agency      │
│  board members                                                    │
│                                                                   │
│  • A series of public forums on the Lead Community idea, "Best    │
│  Practices" and/or goals and visions for Jewish education         │
│                                                                   │
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Commission Programs

A coherent set of programs should evolve from the commission process, reflecting the vision, strategies, priorities, and recommendations of the Commission. A refined set of criteria for program selection should also naturally evolve from those deliberations.

Program Selection: There are several methods for developing programs and working out program implementation details:

- Delegate responsibility for specific recommendations to agencies
- Empower task forces as part of commission deliberations.

Box 17 offers suggestions for developing program recommendations which, with some modifications, apply to each of the above selection approaches.

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│  Box 17:  Steps in Developing Program Recommendations                     │
├─────────────────────────────────────────────────────────────────────────┤
│                                                                           │
│  • Adapt commission criteria for evaluating ideas                         │
│                                                                           │
│  • Develop list of promising program ideas:  review "Best Practices"      │
│    materials for promising programs, confer with CIJE, best practices     │
│    sites, and/or national institutions                                    │
│                                                                           │
│  • Review most promising ideas for content, scope of impact, and quality  │
│                                                                           │
│  • Test assumptions:  define questions and obtain answers                 │
│                                                                           │
│  • Review with CIJE, national experts, and local users                    │
│                                                                           │
│  • Detail program needs, operations and implementation                    │
│                                                                           │
│  • Estimate costs                                                         │
│                                                                           │
│  • Set priorities and phasing among program ideas                         │
│                                                                           │
│  • Present priorities and justification to Commission                     │
│                                                                           │
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VII. FINANCIAL RESOURCE DEVELOPMENT

"... the environment in the Jewish community is not sufficiently supportive of the massive investment required to bring about systemic change. This affects the priority given to Jewish education, the status of the field of Jewish education and the level of funding that is granted."

A Time to Act, p. 41

Lead communities will need to develop a short-term and a long-term strategy for obtaining funding to support Commission initiatives. Obvious potential categories include:

■ Annual campaign allocations for local services (either increased amounts or reallocations)

■ Creation or expansion of a fund for Jewish education

■ Major donors

■ Foundations (Jewish oriented, and possibly secular ones also)

Naturally, early on primary attention will focus on obtaining resources for start-up efforts. CIJE will assist lead communities by establishing and nurturing contacts between foundations interested in specific programmatic areas, and lead communities that are developing, modifying, or expanding their efforts in those areas.

We recommend that fundraising for this effort proceed in a planful way, much like the annual campaign:

1. Identify potential funders in different categories, e.g.:

   o Major donors
   o Medium/large donors
   o Family foundations
   o Community foundations
   o National foundations

2. Review strategies with CIJE

3. Match programs to funder interests

4. Identify person/team to make first contact. Consider enlisting Commission members for this role.

5. Follow-up, as appropriate.

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