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Monitoring, Evaluation, and Feedback in Lead Communities
Tentative Plan of Work for 1992-93
August 1, 1992

I. CONTENT

For lead communities, 1992-93 will be a planning year. The agenda for the evaluation project is to raise questions that will (a) stimulate and assist the planning process; (b) enumerate the goals that lead communities intend to address; and (c) identify current practice so that progress towards goals can be assessed in the future. Broadly, the field researchers will raise three questions:

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

Visions of reform. The issue of goals was not addressed in *A Time to Act*. The commission report never specified what changes should occur as a result of improving Jewish education, beyond the most general aim of Jewish continuity. Specifying goals is a challenging enterprise given the diversity within the Jewish community. Nonetheless, the lead communities project cannot advance--and it certainly cannot be evaluated--without a compilation of the desired outcomes.

For purposes of the evaluation project, we will take goals to mean outcomes that are desired within the lead communities. We anticipate uncovering multiple goals, and we expect persons in different segments of the community to hold different and sometimes conflicting preferences. Our aim is not to adjudicate among competing goals, but to uncover and spell out the visions

for change that are held across the community. To some extent, goals that emerge in lead communities will be clearly stated by participants. Other goals, however, will be implicit in plans and projects, and the evaluation team will need to tease them out. The evaluation project will consider both short-term and long-term goals.

Another reason for focusing on visions is that a lack of clear goals has hindered the success of many previous reform efforts in general education. For example, the New Futures Initiative, an effort by the Casey Foundation to invigorate educational and community services in four inner-city communities, was frustrated by poor articulation between broad goals and specific programs. Although the communities were mobilized for reform, the connections between community leaders and front-line educators did not promote far-reaching programs for fundamental changes. New programs were generally supplemental, and they tended to produce superficial changes.

Questions related to visions include asking about anticipated obstacles, about overcoming barriers between segments of the Jewish community, and about how participants foresee moving from goals to implementation. By asking questions about visions, the evaluation project will not only document goals, but will help persons at all levels of the lead communities project--lay leaders, parents, educators, and other Jewish professionals--to think about their visions of the future. This process may lead to interactive thinking about goals, and may help the communities avoid purely top-down or bottom-up strategies.

It will be important to consider the concreteness of the visions in each community. Do the visions include a concept of implementation, or do ideas about goals remain abstract? Do participants recognize a link between their visions of change and the structure they have established to bring about change?

Community mobilization. According to *A Time to Act*, mobilizing community support for Jewish education is a "building block" of the lead communities project, a condition that is essential to the success of the endeavor. This involves recruiting lay leaders and educating them about the importance of education, as well as increasing the financial resources that are committed to education. The Report quotes one commissioner as saying, "The challenge is that by the year 2000, the vast majority of these community leaders should see education as a burning issue and the rest should at least think it is important. When this is achieved...money will be available to finance fully the massive program envisioned by the Commission (p. 64)."

Recent advances in educational theory also emphasize the importance of community-wide, "systemic" reform instead of innovations in isolated programs. Educational change is more

likely to succeed, according to this view, when it occurs in a broad, supportive context, and when there is widespread consensus on the importance of the enterprise. Hence, an important issue for the evaluation of lead communities is the breadth and depth of participation in the project. What formal and informal linkages exist among the various agencies of the community? Which agencies participate in the visions of change that have been articulated?

As part of their applications lead communities are proposing planning processes for the first year of work. In studying mobilization in the communities, we need to observe how this planning process unfolds. Is the stated design followed? Are departures from initial plans helpful or harmful? Is there broad participation? Are the planners developing thoughtful materials? We will need to describe the decision-making process. Is it open or closed? Are decisions pragmatic or wishful?

The professional lives of Jewish educators. Enhancing the profession of Jewish education is the second critical building block specified in *A Time to Act*. The Report claims that fundamental improvement in Jewish education is not possible without radical change in areas such as recruitment, training, salaries, career tracks, and empowerment of educators. Hence, the evaluation project will establish baseline conditions which can serve as standards for comparison in future years.

Field research may center on characteristics and conditions of educators including background and training, salaries, and degree of satisfaction with salaries; school facilities; cohesiveness of school faculties cohesive; administrative support for innovation; and so on. Additionally we will observe a subset of educational programs that are in place as the lead communities project begins. These observations will be used as baseline data for comparative purposes in subsequent years. We will try to consider programs which, according to the visions articulated in the community, seem ripe for change.

II. METHODS

In the long term (e.g., four years?) it is possible to think about quantitative assessment of educational change in lead communities. This assessment would involve limited surveys that would be administered in 1993-94 and repeated perhaps every two years. For the present, the evaluation project will make only limited use of quantitative data, relying mainly on information gathered by the community itself, such as participation rates, trends in funding, teacher turnover, etc. The bulk of the assessment carried out by the evaluation project, at least during the first two years, will emphasize qualitative assessment of the process of change in lead communities. The main methodological tools will be interviews and observations.

Snowball sampling for interviews. A "snowball" technique for selecting interview respondents appears appropriate here. In this approach, the researcher identifies an initial group of respondents, and adds to the list of subjects by asking each interviewee to suggest additional respondents. At some point in an interview, for example, the researcher might ask, "Who else is involved in (program x)? Who else is a leader in this area in this community?" Subsequently, the researcher interviews some of those named by previous subjects, particularly if new subjects are named by more than one previous informant.

In the snowball approach, it is important to begin with multiple starting points, so that one does not become confined to a narrow clique within the community. We might use the following three starting points from which we would snowball outward:

- (1) Key actors identified in the lead communities proposal from each community.
- (2) A list of leaders of all community organizations that are involved in education, possibly prepared by the head of the local Jewish federation. The list must include leaders of any organizations that are not participating in the lead communities project.
- (3) Random samples of educators and lay persons not included in (1) or (2).

These samples should clarify the social ecology of the Jewish community.

Aims of evaluation. The purpose of the evaluation, especially in the first two years, is weighted more towards developing policy than towards program accountability. Feedback on the process is seen as much more important than summative evaluation, at the present time. We suspect that most Jewish educators recognize that Jewish education is not succeeding, and will understand that the field researchers are not there to document their failures. Instead, the field researchers can serve the educators and their communities by helping them reflect on their situations and by serving as mirrors in which their programs can be viewed alongside their goals.

In one sense, the evaluation project does emphasize accountability. By the end of the first year, lead communities are expected to have well-articulated visions for change, and implementation plans developed. The evaluation project will help judge whether the processes within the lead communities are leading towards these outcomes, and will assess progress toward these general goals in the spring of 1993.

CIJE Lead Communities Monitoring, Evaluation, and Feedback Project

Mission

The mission of the CIJE Lead Communities Monitoring, Evaluation, and Feedback Project is to document the process and implementation of change in Jewish education taken by each lead community.

Components of Project

The CIJE Lead Communities Monitoring, Evaluation, and Feedback Project consists of three components. The monitoring component involves observing, documenting, and tracking the process of planning and implementing change in each lead community. The evaluation component involves interpreting information in a way that will strengthen and assist each lead community's efforts to improve Jewish education. Feedback, the third component of the project, will occur in the form of oral and written communication to community members. Each of these components is aimed at providing the lead communities with information that can be utilized by them in their continuing efforts to improve Jewish education.

First Year Focus

For the lead communities, 1992-1993 will be a planning year. During this first year, the field researchers will act as mirrors to each community by documenting what is occurring during the planning process and reflecting this information back to the communities to assist them in further planning and implementation. The focus for the field research team will be to raise questions that will stimulate and assist the planning process, enumerate the goals that lead communities intend to address, and identify current practice so that progress toward goals can be assessed by each community in the future.

During the planning year, the field researchers will address four broad issues: (a) pre-planning that occurred prior to selection as a lead community, (b) visions of change in Jewish education held by members of each lead community, (c) the extent of community mobilization for Jewish education in each lead community, and (d) the nature of the professional lives of Jewish educators in each lead community.

Pre-planning. The field researchers will ask participants to think retrospectively about their community's entry into the Lead Communities Project. What motivated community leaders to participate in CIJE's Lead Communities Project? What was the process of preparing for involvement with CIJE as a potential lead community?

Visions of change. The field researchers will describe visions of change that are held across the community. It is expected that multiple visions will be articulated and that people in different segments of the community will hold different and sometimes conflicting visions. It is not the role of the field researchers to adjudicate among competing visions, but, rather, to uncover and spell out the visions of change that are expressed by community members.

Community mobilization. Mobilizing community support for Jewish education is an important factor in the CIJE plan for its Lead Communities Project. The field researchers will document the breadth and depth of participation in Jewish education in each lead community. The field researchers will observe how the planning process for community mobilization unfolds and they will describe the decision-making processes that occur during the planning stages.

Professional lives of Jewish educators. Enhancing the profession of Jewish education is another important factor in the CIJE plan for its Lead Communities Project. Areas for change in lead communities might include recruitment, training, salaries, career tracks, and empowerment of educators. The field researchers will document aspects of the professional lives of educators, such as working conditions of educators, school facilities, interpersonal relationships of educators, and administrative support for innovation.

Methods

The CIJE Lead Communities Monitoring, Evaluation, and Feedback Project will provide qualitative documentation of the process of change in each lead community. A team of three field researchers will collaborate on data collection and interpretation. Each field researcher will take primary responsibility for one of the lead communities. At planned times, all three researchers will meet and collaborate on data collection in each of the communities. Data collection will include interviews, observations, and document collection.

Interviews. Interviews consist of face-to-face communication with one or more persons. Open-ended questions will be used with a focus on gaining each participant's perspective of key issues (e.g., professional lives of educators). Interviews will be conducted with a wide-range of community members with the aim of gaining multiple perspectives on issues. Most participants will be interviewed multiple times to gain their perspectives on a variety of issues. Interviews will be tape-recorded to gain an accurate picture of participants' perspectives and to be able to document participants' stories in their own words.

Initial contacts for interview participants can be identified through several sources: (a) key participants identified in each lead community's proposal to CIJE, (b) people involved in the site visitations by CIJE, and (c) lists of lay and

professional leaders of all community organizations involved in education in each lead community. Names of additional participants may be gained from initial interview participants, organization participants, and social contacts. A broad range of community members will be interviewed, including lay leaders, professionals, parents, students, and general community members.

During the second and third years of the project, reflective practitioners will be included as participants. These reflective practitioners will be educators/practitioners who will participate by systematically reflecting on and writing about their own educational efforts and experiences.

Observations. Observations will include both formal and informal settings. Formal settings would include planning and decision-making meetings related to the lead communities project and educational programs (e.g., day schools, supplementary schools, early childhood programs, adult education). Informal settings may include camps, youth groups, and family education events. The field researchers will act as observer-participants in these settings. The primary responsibility of the field researchers during observations is to document activities and conversations that occur. This documentation will occur through note-taking and, when appropriate, tape-recording or videotaping.

Documents. Documents related to Jewish education in each lead community will be collected. These documents might include findings from previous research, notices/minutes of meetings, newspaper articles, handbooks for parents and/or faculty, and curriculum materials.

Reports

Oral and written reports will be given to each lead community on a regular basis. The first quarterly report will be disseminated in February, 1993. This first report will be a descriptive report of the process of preparation and planning for change by each lead community. Additional quarterly reports will be disseminated throughout the three years of the CIJE Lead Communities Monitoring, Evaluation, and Feedback Project.

Annual reports will be disseminated in May of each year. These reports will describe and interpret processes and products of educational changes that occur in each lead community.

Tentative Time Line for CIJE Lead Communities Monitoring, Evaluation, and Feedback Project

Nov. 1992	Feb. 1993	May 1993	Fall 1993
Document Collection Interviews: Prep/Planning Educators Attend planning mtgs. Observe current practices	First Report Interviews: Community members Observe programs	Second Report	Reflective practitioners

Note: This time line is tentative and flexible and will be adjusted according to the needs of each community. Data collection is continuous throughout the project and dates on the time line indicate starting dates for aspects of data collection.

Needs of the Research Team

Lists of names and telephone numbers for initial contacts
Access to planning and decision-making meetings
Access to documents related to Jewish education in lead community
Access to schools and programs for observations

December 14-18, 1992 Research Team Visit

Need lists of names and telephone numbers for initial contacts and educational directors



February 1993

RATIONALE FOR THE PROJECT

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

By monitoring we mean observing and documenting the planning and implementation of changes. Evaluation means interpreting information in a way that will strengthen and assist each community's efforts to improve Jewish education. Feedback will occur in the form of oral and written responses to community members and to the CIJE.

Two aspects of educational change need to be addressed: The process of change and the outcomes of change. At present, we are in much better position to study the process of change, because the outcomes have not yet been defined. What results are we expecting? Increased participation? Gains in Judaic knowledge? More ritual practices? Better affect towards Jewish institutions? We will use our study of the process of change to elicit the goals of the project that are particular to the three communities taking part.

The lead communities project is a direct result of A TIME TO ACT. Although that document provided the essential blueprint for the project, it was silent on the question of outcomes. One contribution of the early stages of the evaluation project will be to enumerate the variety of specific goals envisioned within the lead communities.

Despite the ambiguity about goals at present, there are a few uncontroversial outcomes. For example, all would agree that increased participation in Jewish institutions by the Jews of the community is desirable. This type of measure can be monitored from the outset.

FIELD RESEARCH IN LEAD COMMUNITIES

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

Studying the process is also important in the case of unsuccessful innovation. Suppose despite the best-laid plans, Community X is unable to increase its

professional teaching force. Learning from this experience would require knowledge of the point at which the process broke down.

It is essential to begin monitoring the process of change as soon as possible -- ideally before the change process actually begins. There are three reasons to commence this study early on:

(1) In order to understand change, it is obviously essential to gather baseline information before the change has occurred. Baseline information means not only essential quantitative data, such as enrollment figures, but understanding of the structure and culture of the community at the outset. What ideas about Jewish education are prevalent? How are these ideas, or visions, distributed through the community? What is the nature of leadership and communication in this community? To what extent is the community mobilized for Jewish education? What characterizes the professional lives of Jewish educators? Answers to these questions must be chronicled to strengthen the collective memory for later comparison. The earlier the evaluation staff is present, the sooner they can obtain a general background understanding of the community, and can also establish a positive rapport with community members. That way they are less likely to miss or misinterpret changes that occur once the implementation begins.

(2) The early presence of evaluation staff can help stimulate new visions for Jewish education and can heighten the mobilization of the community. Lead communities have the opportunity to consider dramatically restructured approaches to Jewish education in addition to modifications of existing programs. By asking community members about their visions for the future, and by providing feedback that facilitates communication about such visions, the evaluation project can encourage a constructive dialogue within the communities.

(3) The CIJE is a long-term enterprise, not a one-shot deal. There is every chance that more lead communities will be created in the next three, five, or ten years. We need to learn about the launching and gearing-up process so other communities can learn from this experience. For example, very little is known about mobilizing lay persons in support of education. We need to watch how this occurs so other communities can follow.

To carry out this task, we have hired a team of three FIELD RESEARCHERS. One researcher is based in each community, but they will all spend time in all three communities. This is because they have complementary strengths -- they differ in their expertise as researchers, and in their knowledge of Jewish education -- and because keeping more than one pair of eyes on a situation provides both a check and a stimulus for deeper interpretation.

The design of the lead communities project calls for each community to carry out a self-study, which presumably would include information on community composition, population trends, and enrollment figures. The field researchers are prepared to

assist in this process, but they cannot be its primary agents, lest they have no time for their other activities.

For next year, we are proposing a survey component to the evaluation project, which would gather baseline data on affective, behavioral, and cognitive outcomes, probably from a selected youth cohort within each community. We hope to proceed with the surveys despite the lack of consensus about goals, because of the overriding importance of gathering some form of baseline data on outcomes which can be tracked over the years. The surveys would incorporate community input into their design.



To: Seymour Fox and Annette Hochstein

From: Adam Gamoran and Ellen Goldring

Re: Monitoring, Evaluation, and Feedback Plans

Date: July 25, 1993

This memo describes our plans for Monitoring, Evaluation and Feedback of Lead Communities for the next year, September 1993-August, 1994.

Our proposal is divided into three areas of work: 1) Ongoing continuation of monitoring and feedback, 2) Conducting the community self-study, and 3) Preparing for assessment of cognitive outcomes.

1) ONGOING MONITORING AND FEEDBACK

In the fall, we will present to the lead communities and CIJE a year one, cumulative report about mobilization and visions. This will follow our cumulative reports about the professional lives of educators. Next year we will continue to monitor the three areas that are central to the MEF plan and the LC effort: visions, mobilization, and professional lives of educators.

Visions. The issue of goals was not addressed in *A Time to Act*. The commission report never specified what changes should occur as a result of improving Jewish education, beyond the most general aim of Jewish continuity. Specifying goals is a challenging enterprise given the diversity within the Jewish community. Nonetheless, the lead communities project cannot advance--and it certainly cannot be evaluated--without a compilation of the desired outcomes.

For purposes of the evaluation project, we will take goals to mean outcomes that are desired within the lead communities. We anticipate uncovering multiple goals, and we expect persons in different segments of the community to hold different and sometimes conflicting preferences. Our aim is not to adjudicate among competing goals, but to uncover and spell out the visions for change that are held across the community. To some extent, goals that emerge in lead communities will be clearly stated by participants. Other goals, however, will be implicit in plans and projects, and the evaluation team will need to tease them out. The evaluation project will consider both short-term and long-term goals.

In this area, the most exciting development during the past year was the initiation of the CIJE Goals Project, an effort to assist the communities in articulating clear and measurable goals. The Goals Project has three elements, each of which will be monitored by the MEF project as they come into contact with the communities:

(a) CIJE has successfully recruited the national denominations (orthodox, conservative, and reform) to provide resources to community institutions (e.g., synagogues, schools, community centers) to help them focus on goals that are specific to their contexts. CIJE staff will facilitate this relationship.

(b) CIJE staff will encourage and help the local lead community commissions to develop vision statements that will describe the overall purpose of the lead community project, and how it expects to be judged.

(c) The Mandel Institute will share with the denominations and the communities its project on alternative conceptions of the Educated Jew.

The first task of the evaluation team will be to document the process through which clear goals become articulated. The second task will be to establish, in consultation with the communities, the measures needed to evaluate progress towards these goals.

Mobilization. According to *A Time to Act*, mobilizing community support for Jewish education is a "building block" of the lead communities project, a condition that is essential to the success of the endeavor. This involves recruiting lay leaders and educating them about the importance of education, as well as increasing the financial resources that are committed to education. The Report quotes one commissioner as saying, "The challenge is that by the year 2000, the vast majority of these community leaders should see education as a burning issue and the rest should at least think it is important. When this is achieved...money will be available to finance fully the massive program envisioned by the Commission (p. 64)."

Each of the communities has shown activity in this area during the first year, although in different ways. Our task for 1993-94 will be to monitor progress in this area, with special attention to key issues that emerged during the previous year. Among these are:

-- Although local commissions contain representatives from diverse constituencies, there are as yet no mechanisms for these representatives to inform and galvanize support in their constituencies. Through what processes does successful diffusion of mobilization and support occur?

-- Educators are playing important roles as representatives of their institutions. What are the means through which the communities effectively encourage educators to further the lead community process through development and implementation of educational innovations?

-- In successful mobilization of lay leadership, what is the interplay between recruiting leaders in support of specific projects (e.g., day school scholarships), as compared with leadership for the total lead community process?

Professional lives of Jewish educators. Enhancing the profession of Jewish education is the second critical building block specified in *A Time to Act*. The Report claims that fundamental improvement in Jewish education is not possible without radical change in areas such as recruitment, training, salaries, career tracks, and empowerment of educators.

During the first year, we established baseline conditions that can serve as standards for comparison in future years. In 1993-94, we will monitor how information is being utilized from the educator survey and professional lives of educator reports, and monitor whether a treatment plan for personnel is being developed. We will learn about the components, scope, and implementation of such plans. In addition, we will continue our work on personnel and professional lives of educators by studying informal educators and adult educators.

Products. The products of this aspect of our monitoring and feedback for next year will include:

- 1) monthly feedback to the lead communities,
- 2) monthly updates to CIJE,
- 3) cumulative year two reports to communities and CIJE about visions, mobilization, and personnel, and
- 4) special topics reports as issues arise (e.g., the changing roles of BJE's).

2) COMMUNITY PROFILES (SELF STUDY)

In response to the pace of implementation in the lead communities, we are willing to take on as our responsibility the self-study. (Since this is no longer a self-study, we are terming this aspect of our work, community profiles.) Building full community profiles will be a two year process. In the first year we propose that we emphasize collecting data from community institutions and agencies to address the question: What is the educational profile of the lead communities? In the second year we propose a needs analysis/market oriented survey of clients and constituencies to determine their views and needs in regard to Jewish education in the lead communities.

In the first year we will focus on the issues set forth in the planning guide concerning the self study (pages 10-12). The MEF team, in conjunction with the CIJE Education Officer, will begin to work with the communities to coordinate and implement this effort. Our goal is to cultivate enthusiasm and secure ownership through the CIJE/LC partnership.

We will also meet with the LC coordinators to get their input into the types of information that will be useful to them as well as learn about the types of information already available. We will collect examples of the types of demographic and/or educational profiles that have been used in other communities. After these consultations we will develop a methodology and reporting form that can be used by all the LCs to report the community profile information. The field researchers will work with the LC coordinators to facilitate the process. We will enter the information into a data base, and provide each community with a profile based on the analyses generated from the information provided. In addition, qualitative data collected through our ongoing monitoring process will be included as integral components of the community profiles.

Products. The outcomes of this aspect of our work will be:

- 1) a methodology and standard reporting form for community profiles,
- 2) analyses and reports of the community profile of each LC, and
- 3) A summary report of the profiles of all three LCs.

In order for us to begin this aspect of our work, CIJE will need to put this project on the agenda so all the LCs know that this will be a major endeavor to begin in the fall. In addition, the question about resources will need to be clarified with the LCs. While some of the information of the community profiles will be readily available, new information will need to be collected and generated. This may incur certain expenses, as well as ancillary fees for mailings, forms, secretarial assistance, data processing, etc.

3) COGNITIVE OUTCOMES

Local data from community profiles is not sufficient for a long-term study of change. Thus, we propose that the third part of the MEF plan for next year begin to plan for and seek appropriate instruments for quantitative assessment of outcome data that are important to the advancement of Jewish education and continuity. This component is crucial in order to begin to monitor trends in the outcomes of Jewish education.

We propose to focus the initial assessment of outcomes on Hebrew language. We have chosen this outcome for two reasons: 1) There is a high level of agreement that Hebrew language is a crucial

outcome of Jewish education, and 2) The greater likelihood of finding appropriate assessment procedures.

One possibility is new work by an expert in the assessment of Hebrew as a second language, Professor Elana Shohamy of the Hebrew University of Jerusalem. An initial consultation with Professor Shohamy was quite promising and we will continue to work on this issue during the coming year.

4) CONCLUSION: FOSTERING EVALUATION-MINDED COMMUNITIES

As we noted in this year's progress report to the CIJE Board, the MEF project will be successful if each Lead Community comes to view evaluation as an essential component of all educational and social service programs. We hope to foster this attitude by counseling reflective practitioners -- educators who are willing to think systematically about their work, and share insights with others -- and by helping to establish evaluation components in all new Lead Community initiatives.





To: Annette and Seymour
From: Ellen and Adam
CC: Julie and Roberta
Re: Monitoring, Evaluation, and Feedback Plans
Date: July 25, 1993

This memo presents our proposal for Monitoring, Evaluation and Feedback of Lead Communities for the next year, September 1993-August, 1994.

Our proposal is divided into three areas of work: 1) Continuation of ongoing monitoring and feedback, 2) Conducting the community profiles (self-study), and 3) Conducting Hebrew language assessment in day schools.

1) ONGOING MONITORING AND FEEDBACK

In the fall, we will present to the lead communities and CIJE a year one, cumulative report about mobilization and visions. This will follow our cumulative reports about the professional lives of educators. Next year we will continue to monitor the three areas that are central to the initial phases of the MEF plan and the LC effort: mobilization, visions, and professional lives of educators. We will focus and refine our questions on specific issues which are emerging from our first years' work. For example, in terms of mobilization, one of the questions we will continue to monitor is, Are lay leaders being mobilized into the lead community process? In terms of visions, we will ask, What is the nature of the visioning process?

Perhaps the area in which we expect to see the most activity is around the topic of personnel and the professional lives of educators. In this area we will monitor how information is being utilized from the educator survey and professional lives of educator reports, and whether a plan for personnel is being developed. We will learn about the components, scope, and implementation of such plans. In addition, we will continue our work on personnel and professional lives of educators by studying informal educators and adult educators.

As implementation progresses, we will ask, What is considered when a new project is proposed? That is, who is informed, what entities are considered, what steps are taken in what order, etc.

We will engage in a dialogue with you and the LCs to refine the specific questions for this aspect of our work.

The products of this aspect of our monitoring and feedback for next year will include:

- 1) monthly feedback to the lead communities,
- 2) monthly updates to CIJE,
- 3) cumulative, year two reports to communities and CIJE about mobilization, visions, and personnel, and
- 4) special topic reports as issues arise (e.g., the changing roles of BJEs).

2) COMMUNITY PROFILES (SELF STUDY)

Due to the slow pace of implementation in the lead communities, we are willing to take on as our responsibility the self-study. (Since this is no longer a self-study, we are terming this aspect of our work, community profiles.) Building full community profiles will be a two year process. In the first year we propose that we emphasize collecting data from community institutions and agencies to address the question: What is the educational profile of the lead communities? In the second year we propose a needs analysis/market oriented survey of clients and constituencies to determine their views and needs in regard to Jewish education in the lead communities.

In the first year we will focus on the issues set forth in the planning guide concerning the self-study (pages 10-12). The MEF team, in conjunction with the CIJE staff person taking Shulamith's place, will begin to work with the communities to coordinate and implement this effort. Our goal is to cultivate enthusiasm and secure ownership through the CIJE/LC partnership.

We will meet with the LC coordinators to get their input into the types of information that will be useful to them as well as learn about the types of information already available. We will collect examples of the types of demographic and/or educational profiles that have been used in other communities. After these consultations we will develop a methodology and reporting form that can be used by all the LCs to report the community profile information. The field researchers will work with the LC coordinators to facilitate the process. We will enter the information into a data base, and provide each community with a profile based on the analyses generated from the information provided. Furthermore, qualitative data collected through our ongoing monitoring process will be included as integral components of the community profiles.

The outcomes of this aspect of our work will be:

- 1) a methodology and reporting forms for community profiles,
- 2) analyses and reports of the community profile of each LC, and
- 3) a summary report of the profiles of all three LCs.

In order for us to begin this aspect of our work, CIJE will need to put this project on the agenda so all the LCs know that this will be a major endeavor to begin in the fall. In addition, the question of resources will need to be clarified with the LCs. While some of the information of the community profiles will be readily available, new information will need to be collected and generated. This may incur certain expenses, as well as ancillary fees for mailings, forms, secretarial assistance, data processing, etc.

3) Assessment of Hebrew Language Achievement

Local data from community profiles is not sufficient for a long-term study of change. Thus, we propose that the third part of the MEF plan for next year begin the quantitative assessment of outcome data that are important to the advancement of Jewish education and continuity. This component is crucial in order to begin to monitor trends in the outcomes of Jewish education.

We have chosen to focus the initial assessment of outcomes on Hebrew language. We have chosen this outcome for two reasons: 1) Hebrew language is one key outcome of Jewish education, and 2) Assessment procedures are readily available for our use.

The assessment of Hebrew language by MEF will provide baseline data about Hebrew language for the Lead Communities and CIJE. In addition, the initial assessment will provide feedback to the schools about their Hebrew language achievement and MEF can re-evaluate Hebrew language two or three years later, thus providing longitudinal data about the processes and outcomes of change in these schools. The field researchers will monitor the processes of change in these schools. Furthermore, if LC's are focusing on personnel and other key building blocks for educational improvement in a systemic manner, we should see changes in the Hebrew language performance of students: more resources, better curricula and teachers and more emphasis on learning should affect Hebrew language. We believe that this is an important resource that CIJE can make available to the communities.

We suggest that we contract with Elana Shohamy from the Melton Center to carry out this assessment process. Elana has developed a diagnostic system for Hebrew Language assessment for day schools and is presently developing such a system for supplementary schools. This system is unique in that it takes into account the specific curriculum of each school and provides the school with diagnostic feedback based on the results of the test. Elana has carried out this assessment in numerous day schools in the US, and can immediately begin work with CIJE.

We propose the following plan for Day Schools-Sixth Grade in 1993-94:

- 1) After approval of this aspect of the MEF project, Elana Shohamy and each Field Researcher will meet with the LC coordinator in each

community to explain the project. We anticipate this will occur in the fall (Elana will be in the states in Sept-Oct).

2) After this initial meeting, each LC coordinator will decide on the best way to approach and contact the day schools. Elana can do this with a letter and a follow up, or it could be handled centrally by the LC coordinator, etc.

3) After initial contact has been made with the schools, Elana will contact the principals to explain the project and to begin to set up a work plan with each school.

4) Once a work plan is in place for each school the process begins: Elana and her team meets with the school to learn about the schools curriculum, a test is developed, testing takes place, analyses are done of the tests by the Melton center in Jerusalem, diagnostic feedback is provided to each school by Elana and her team.

5) The field researchers will assist Elana in the process of testing. Elana and her team provide each school with an individual report. The MEF team will provide the LC with a report about the Hebrew Language Assessment of the community based on the results provided in Jerusalem.

6) The FR will monitor the feedback process in the schools and will observe and monitor the processes of change in the day schools during the next two years. In other words, they will be looking at the ways in which the schools are changing and acting upon the diagnosis provided to them by the Hebrew Assessment. This is a crucial step of the MEF project and can provide information for the ongoing feedback loop in the community as well.

7) Two or three years after this initial assessment, the assessment will be carried out again. Gains can be measured, and the monitoring information can be used to explain where gains have been found and where no gains have been realized.

8) Since Elana has comparative data from other day schools in the US, we can compare the results of the schools in the LC's with other, similar day schools, in other communities.

Issues of funding for this project will need to be addressed. We suggest that CIJE provide the necessary resources to support this project.

The outcomes of this aspect of our work next year will be:

- 1) Baseline data of Hebrew language for sixth grade day school students,
- 2) feedback to the schools about the baseline assessment,
- 3) a process in place for monitoring and measuring change in Hebrew language.

We look forward to discussing these plans with you.

February 10, 1994

To: Julie, Roberta, and Bill
From: Adam and Ellen
CC: Alan, Gail, Barry, Annette, Seymour, Steve, Dan
Re: work plan of the MEF project

In our consultation with Annette, Seymour, and Steve on February 10, we gained a number of new insights with important implications for our ongoing work. I'm writing to share those insights with you, and to spell out what I see as their implications for our work. I hope you will discuss them together in your meetings on Feb. 15-17.

The meeting covered three main topics: understanding mobilization, community profiles, and studying goals.

Understanding Mobilization

All three of the major respondents to our mobilization reports (Alan, Annette, and Steve) stressed the need for a more developed and focused assessment of the breadth and depth of mobilization in the lead communities. As Alan put it,

Because the report is written consistently from the centre outwards and shows little evidence of testing the degree and depth of mobilization of the key lay and professional actors in Milwaukee, we don't know about the penetration of the mobilization. One is left wondering, and this happens every time I visit there, whether we have an elaborate structure for mobilization without the necessary penetration.

This probably is a result of the fact that...we have no benchmarks for mobilization in any community.

In light of these comments, I posed the question to the group: How should we recognize mobilization? What are the key criteria? How can we assess the extent and depth of mobilization in a more concrete way than we have done before?

Together, we arrived at two responses. First, we obtained the attached list of eight criteria which, we are advised, constitute mobilization. I see this as a very helpful elaboration of information which we have received in the past. As you'll recall, in the past we had to come up with our own definition of mobilization, after reading through all the relevant CIJE documents. Through this discussion, we were able to pin down a more specific list, which includes not only criteria, but suggested indicators of those criteria. I think this will be

enormously helpful in carrying out our monitoring and reporting in the future.

Second, our discussion led to the realization that we (all of us, not just MEF) have not yet developed an adequate conceptual framework for studying the mobilization of Jewish communities. What is needed is a rich discussion of the issue, laying out both concepts and indicators. A primary source of information would be interviews with top professionals and lay persons in this field, such as Steve Hoffman, Mark Gurvis, Barry Schrage, Gail Dorph, Jon Woocher, Mort Mandel, and Chuck Ratner. Each of these individuals has experience in what it means to try to galvanize a Jewish community around a focal issue, particularly the issue of continuity.

I would like the MEF field research team to take up this assignment later this spring. I envision a paper on the meaning of community mobilization, taking into account CIJE "theory," our investigations in lead communities so far, and the insights of experts. The paper would likely include the eight elements that were suggested in our meeting today, but in a more sophisticated and conceptually grounded framework. Other criteria may also emerge from the interviews. Moreover, the paper would include not only concepts, but indicators as well. In this way, we would "establish benchmarks for mobilization" to be used in future assessments.

As a first step, I suggest that the field research team prepare a memo suggesting how this project could be carried out, including any modifications that seem appropriate.

It seems to me that this project dovetails nicely with Roberta's dissertation. Also I'm sure we'll benefit from Julie's expertise in figuring out how to ask the experts the right questions to find out from them how we should conceive of and recognize the mobilization of a Jewish community.

Community Profiles

I introduced our thinking on the topic by leading the group through Bill's memo of January 22. We discussed a number of possible directions in which this project could go. It seems there are at least three levels of detail that one could collect on Jewish educational institutions which might constitute institutional profiles. One level are the basic "facts," such as those listed in Box 4 and those listed on the bottom of the first page of Bill's memo. A second level is to get somewhat richer information about what's going on in the institution. This might include information about "school climate," program coherence, parent involvement, and so on, at the level of detail one might obtain from focus groups of teachers and an interview with a principal. A third level of information would be an observational study of classrooms to determine the quality students' educational experiences.

Bill's discussion of the three purposes, and his questions about timing, agenda, and inter-community relations, were well received, if not really answered. The profile data are closely linked to goals, as Bill pointed out. Thus, one item that needs to be included is information about institutional goals. At the first level of detail, this might be as simple as whether the institution has a mission statement, and how it was produced. At the second level, we could ask whether the institution has a coherent mission, quite apart from whether it has a mission statement. At the third level, we would examine whether stated visions were reflected in classrooms.

Another way of looking at the goals issue is to ask about standards for the items on which we may propose to study for the profiles. What are the standards to which we aspire? If we can answer that question, we will have guidance about what items to study for the profile. I took this to be in keeping with Bill's point that we need to have some idea of where we want to go, in order to gather the right information at the baseline.

Both Box 4 and Bill's list are heavily skewed towards formal education. It is essential that we develop indicators for informal settings as well. Informal education has been essentially left out of our studies so far, and it is critical that it be included in this part of our work.

Where to go with this? To develop a rationale, we need to do more thinking, and more consulting with experts in the area of Jewish schooling. We need to ask, what are the key elements of a profile of a Jewish educational institution? What makes a difference? We should think very broadly at this point. After we gather some collective wisdom, we will be in position to propose what sort of indicators we wish to start measuring.

Thus, we have the task of talking to experts in the field of Jewish education -- Gail and Barry will suggest some names, and I'd make sure to include Roberta on the list -- to establish a set of both basic facts about Jewish educational institutions, and more in-depth list of aspect of schools and programs that could be investigated. This information should be summarized in a memo or paper. This information should lead to a proposal for studying the basic facts, which is where we should start in our data collection.

I think this task is in keeping with our current plans. It adds the notion that we should think more broadly, even if we intend a narrowly-focused data collection in the short term. It also emphasizes the need for a rationale, before we start collecting data.

Clearly this is a task on which Bill should take the lead, but Roberta's and Julie's insights should also figure prominently. I think this should be a team effort.

Studying Goals

Over the long term, when educational institutions in the lead communities have articulated goals, we hope to measure progress towards the goals. To prepare for that, I wanted to talk about three issues: taking stock so far, identifying goals when they emerge, and selecting goals for long-term study.

I began by asserting that we had a clear picture of the state of goals for Jewish education in the communities: There are no well-articulated, coherent, widely-shared goals with clear implications for action. Although the group accepted this statement, they indicated that this was not enough, because it says nothing about goals of individual institutions. From this discussion we arrived at the need to include the presence or absence of a mission statement in the institutional profiles and, to the extent it seems feasible, the institutional profiles could also contain information on how the mission was developed and how widely it is shared. I was also reminded that some institutions may have a coherent mission but no mission statement.

On recognizing meaningful goals, Seymour suggested three types of criteria: goals that a philosopher would recognize as meaningful, goals that would serve the purposes of a policy-maker (e.g., they would galvanize a nation or a community), and goals that can drive what goes on in classrooms. An important insight I gained from this discussion is that the quality of a goal depends partly on the context (as opposed to the content of the goal). For example, the U.S. federal goal that "All children should start school ready to learn" is arguably an effective goal from the policy-maker criterion because it is a national rallying point, where as one Jewish movement's goal that "Jews should learn the Hebrew language" is not an effective goal because it does not lead to action on any level.

The discussion of recognizing goals when they emerge, and selecting goals for further study, will be resumed in the future. For now, the main implication for our work is that whether there is a mission statement (or a mission), and how it was developed, should be part of the institutional profiles, as noted above.

Miscellaneous

A couple of miscellaneous items came up in the course of our discussions:

(a) After sign-off by Adam, update memos intended for CIJE staff should go to Ginny, with a request that she distribute them to Alan, Barry, Gail, and Annette. If it makes sense to give the memo directly to a staff member (e.g. Gail will be in Milwaukee, etc.), a copy should still go to Ginny with instructions on who to send it to.

Please mail a full set of past update memos to Ginny.

(b) Please give me a list of all the interviewees for the study of the professional lives of educators in Baltimore. I am to assure Seymour that we've talked with a representative group, and with all the very important figures.

Towards a Work Plan for 1994

These discussions may result in a partial revision of our work plan for the remainder of 1993-94 and the beginning of 1994-95. (I'm starting to think of this as a work plan for 1994, i.e. a calendar year instead of an academic year.) Here's how I think our work shapes up. The person listed is the person with primary responsibility, but all of these tasks should be conceived of as team efforts.

Tentative Work Plan for 1994

Complete report Milwaukee teaching force (Adam, Ellen)
Complete report on mobilization in Baltimore (Julie)
Complete report on mobilization in Milwaukee (Roberta)
Write report on year 1 1/2 mobilization in Atlanta (Roberta)
Write report on professional lives of Jewish educators in Baltimore (Julie)
Write report on Baltimore teaching force (Adam, Ellen)
Write report on Atlanta teaching force (Adam, Ellen)
Write paper on Jewish community mobilization: concepts and measures (Roberta, Julie, Bill)
Write memo or paper on institutional profiles: concepts and measures, broadly conceived (Bill)
Write proposal for short-term data collection for institutional profiles: indicators and rationale (Bill)
Commence data collection for institutional profiles (Bill, Julie, Roberta)
Commence report on teachers in all three communities (Adam, Ellen, Julie, Roberta, Bill)
Ongoing monitoring and feedback (Julie, Roberta, Bill)

What do you think about this possible work plan? I look forward to hearing from you after your meetings on Feb. 15-17. If I remember correctly, I should expect something in writing, and then we will talk about it in our next conference call.

Indicators of Community Mobilization

1. Are powerful, key, top lay leaders mobilized?
Are they recruiting their peers to participate?
Do they represent the quality and level of leadership desired (quality measured in "wealth, wisdom, and/or work")?
2. Is there a full-time professional staff person for LC?
3. Is there a Triad or Team in place to lead and pull the LC process together, consisting of a:
 - 1) "champion" lay leader,
 - 2) supportive federation executive, and
 - 3) full time educational professional
4. Is there a wall-to-wall coalition?
Is there a cross section of Rabbis, congregational leaders, educational professional leaders, and lay leaders from all sectors, not only representatives?
Indicators of a wall-to-wall coalition may include:
Do people attend meetings?
Are they telling others about the meetings? What are they telling others?
--ask the participants, ask others
Are people taking seriously what is happening in these meetings?
--Are some people worried about not being included?
--Are members reporting back to someone about what is going on?
Are members accountable to anyone, such as a board?
Are there outreach mechanisms in place, such as a LC bulletin?
5. Are Rabbis and educators involved with LC beyond the wall-to-wall coalition?
For example, to what extent do their agendas (meetings, workplan, programs) overlap with CIJE's?
Is LC on their agendas?
Are they briefed regularly about CIJE?
Are there programmatic indications of LC work?
6. Is there significant, additional funding for education?
For example, what percent is additional?
Is there movement toward this goal?
7. Is there ferment in the community about Jewish Education?
Ferment at two levels:

1) Establishment and Leadership, and

2) Community at Large.

For example, what is in the Jewish newspaper?

What is on the agenda for public debate?

Is Jewish education being discussed in the annual campaign?

8. Is anything happening in the area of Jewish education? For example, are new positions being created? Are vacant positions being filled? Is there centralized planning for Jewish continuity?



This fax consists of 3 pages including this cover page. For problems with its transmission, please contact Roberta Goodman at 608-231-3534.

To: Adam Gamoran
Ellen Goldring
Julie Tammivaara
Bill Robinson

From: Roberta Goodman

Re: MEF Workplan April - December 1994

March 31, 1994

I.A. Monitoring and Evaluation of the Personnel Action Plan

The types of questions are broader than you suggest. We need to know:

- 1) How is the plan developed?
- 2) Who approves the plan?
- 3) In what ways is the plan different from what exists?
- 4) In what ways does the plan create systemic change?
- 5) How is the plan going to be funded? What needs to be done by the community to get it funded?

I would recommend expanding the range of questions listed.

I.B. Monitoring and Evaluation of the Lead Community Projects

-- I would use this phrase instead of "Pilot Projects." At some point, we need clarification as to whether or not the Action before the Action Plan, such as the Principals Seminar, is considered a Lead Community Project. If so, then we need to evaluate it.

I. C. Monitoring of Community Mobilization

In our last conference call, Adam, you indicated that this Workplan did not require specification of the two options we were suggesting on clarifying the concept of community mobilization. Yet, what you suggest here is "Option B." Either you need to make this proposal more "generic" covering both options, or you need to present the two options.

To make the paragraph more generic, you could change the paragraph to read:

As proposed by our advisory board, we will conduct interviews to establish criteria by which community evaluation will be evaluated. This will result in a conceptual paper outlining the concepts and measures of mobilization.

As for the second paragraph in this section, I am having difficulty understanding what you mean. What is a vision? With the July Goals workshop for the three Lead Communities in Jerusalem, we would probably be better off monitoring what happens in terms of goals, rather than vision.

II. A. Educator Surveys

I have logistical questions about the educator survey. Is a better version of Nancy Hendrix report going to be written for Baltimore and Atlanta by a CIJE staff member? I have learned from Julie that Baltimore is doing its own analysis of the educator survey data. Does that in any way affect the writing of the integrated report? Should a different model be used in Baltimore than was used in Milwaukee in writing the integrated report?

In your second paragraph in this section, you talk about analyzing the data of the educational leader survey, I have three comments about this. 1) Analyzing the educator survey does not appear on your time line on pages three and four. 2) My understanding of why the Milwaukee data could not be analyzed immediately after it was collected was because the population was too small. Why does it matter if the Milwaukee data is analyzed first? Doesn't the data from all three communities have to be analyzed together? 3) Following on number two, what reports do you envision being written for the educational leaders -- integrated report for each community? cross community of educational leaders survey data only? cross community integrated report?

II.B. Institutional Profiles

I find the purpose stated about gaps highly problematic. It makes promises about what we will look at when we do not even know if the gap between programs and resources is a major concern of the CIJE or the educational experts whom we propose to interview. Why limit ourselves at this stage? I would eliminate it from the Workplan.

Item number three talks about engaging the community in a self-study process. I think that the level of analysis is the community's institutions and not the community. Jewish education for the most part happens within institutions. In the final paragraph in this section, prior to the time line, you talk about practices within institutions. This also makes me think that the level of analysis you are thinking of is the institutional rather than the communal. If the institution is the level of analysis, then your sentence needs to change reflective communities, to reflective institutions.

Time Line

1) As you (Adam) and I spoke, we switched the communities so that I am revising Milwaukee first and then completing Atlanta.

2) Is there any significance to the order in which names are listed by a project? Is the first person listed what you have called "the lead person?"

3) As previously stated, where does analysis of the educational leader survey appear? What other report(s) does that involve? What deadlines for them?

4) We should think about what an integrated report for teachers and education directors within a community might show. Then, we need to decide whether or not to write this report.

5) The June 30 and September 30 mobilization products are out of order. My understanding was that the entire reason for writing a conceptual paper on mobilization was to be able to derive indicators and measures. I do not understand your order. I recommend an August 30 deadline for the mobilization conceptual piece and a September 30 deadline for the indicators and measures.



FAX

To: Adam Gamoran
608 263 2140 [Fax]
608 263 7829 [Office]

Ellen Goldring
615 343 7094 [Fax]
615 322 8037 [Office]

From: Julie Tammivaara
410 653 3727
410 653 4648

Re MEF Workplan April - December 1994

Date: 29 March 1994

I Ongoing Monitoring

Include "and Evaluation" in title?

A. Monitoring and Evaluation of Personnel Action Plan

Suggest these questions:

1. Who participated in the development of the plan?
2. What is included in the plan?
3. What procedure was used to develop the plan?
4. What information [including MEF reports] was used to develop the plan?
5. What are the goals and purposes of the plan?
6. Does it have an evaluation component? If so, what is it?
7. What data are on record for the target institutions, persons, programs?
8. What is the timeline for the plan?
9. What funding provisions have been made or are planned?
10. In what way is the plan innovative?

B. Monitoring and Evaluation of Pilot Projects

Suggest title be changed to "Monitoring and Evaluation of Lead Community Projects"

C. Monitoring of Community Mobilization

The text seems to put "criteria" before "conceptualization." This seems backwards to me. It makes more sense to establish the conceptualization of mobilization and then deduce the criteria from it. This does not preclude asking people about indicators they use to determine whether mobilization has occurred.

The paragraph referring to "visions" is unclear to me. In Atlanta there was considerable discussion about visions, goals, and purposes, the bottom line being people seemed to think they were different things but nobody defined any of the terms. I think "vision" is as problematic as "mobilization." I would suggest this paragraph just say we will continue to monitor the work of LCP-related deliberations such as, in Baltimore, the Lead Communities Project Committee and the Commission on Jewish Education to which to LCPC reports. Visioning may occur here, but much else does as well and it needs to be monitored.

II. Community Profiles

A. Educator Surveys and Interviews

Will there be integrated reports for the educational director surveys and interviews? If so, this needs to be mentioned.

B. Institutional Profiles

Paragraph 1: Won't the data be collected on "Jewish educational institutions" rather than just "programs?" Presumably programs are housed in institutions.

Purposes:

1. This may be a picky point, but I prefer another term to "baseline" since the data will not be taken at the beginning point of either the programs or the LC Project. Another term would be more respectful of the work the communities have accomplished thus far. Ellen talked to us about the importance of "taking stock," a term used by Hank Levin, I believe. This seems more appropriate. The process of periodically "taking stock" should set the stage for institutions becoming more "evaluation minded." Shouldn't this be mentioned as it is a phrase coined by one of our leaders?

2. The "gaps" purpose is unclear. It seems to imply both that institutional resources are, by definition, available at a communal level and that needs can and should be determined at a communal level. What entity is going to represent the community in determining

these communal needs and by what means are individual institutions going to be persuaded that their resources can be offered to fill these needs? I think this purpose is very problematic. It would seem to put the power of everything important in the hands of federations as they are the only entity [in Baltimore at least] that engages in communal planning. While this information can be helpful to communal planners, the emphasis should be on the institutions and what they will gain or we will have trouble getting them to buy in.

3. Is it the community that will engage in "self study" and thereby become more reflective or institutions? I am having trouble trying to imagine a "reflective community." I think the level of analysis is appropriately institutions which may include the federation and central agency. Some entity needs to be in charge of this process inside the communities. Who will this be? How do self studies foster mobilization, which has, in any case, not been defined yet? Wouldn't it be safer to talk about energizing people in institutions to think about their purposes, strengths, weaknesses, etc.?

In sum, it seems to me that for communities interested in engaging in planful change to improve education, it is important a "taking stock" occur periodically. By doing so, a community and its institutions can assess what changes occur over time and gain important information for planning and policy decisions at both levels. By becoming more "evaluation-minded," institutions can be energized to reflect seriously not only upon where they are but where they would like to be and how they might get there.

The next paragraph ["Institutions targeted..."] moves back to institutions as the level of analysis. I think this is correct.

The following paragraph is confusing to me as well. Does this project need approval? It is specifically mandated in the planning guide, so why does it need approval? I can see why a particular plan or proposal for institutional or community profiles would need approval but not the idea of such a project. Given that, I think the emphasis should be on a detailed proposal, which will be developed in a particular way, that is, interviewing experts, developing instruments, etc. I strongly recommend a set of guidelines be developed and distributed with the institutional profile instrument. Accreditation agencies have learned the hard way how important it is to have interpretive guidelines so data are relevant and comparable across institutions. Regarding the product: will there be only one report, as indicated, or should there be three individual ones and perhaps an integrated cross-community report? I am not sure what purpose an integrated report would serve. Who would benefit from such a report?

The word "envision" conjures up a notion of "visioning" and this, as noted above, is still problematic. Would "see" do as well? I would not refer to the institutional profile undertaking as "mere enumeration." For one thing, it will undoubtedly entail gathering information on mission statements, institutional philosophies, and the like, which is more than counting. For another, even doing the work of enumeration is no "mere" task. The definition seems fine, however.

III. Products and Timeline

Some products seem missing: the educator survey reports for Baltimore and Atlanta; the report or reports on educational director surveys; an integrated report for educational directors for each community; and a cross-community report for educational directors.

As noted earlier, it seems to me more reasonable for a conceptualization of a phenomenon to precede instrumentation designed to measure it. The two mobilization reports [June 30 and September 30] seem reversed.

I have received no feedback on my mobilization report that merits a revision other than an error regarding Steve Hoffman's status at one point in time. What is it you want me to revise and how? I have received no suggestions from the MEF team or Alan Hoffmann on my last draft. Alan's "general comments" were written prior to Alan's reading my paper, according to Gail. She has read my paper and has made no suggestions. What are your expectations?

Cover memo

- no Fine-tune for rpt on ed leaders
- no rpt on informal educators

GAMO\$ type julie.cmt

From: EUNICE::"73443.3152@CompuServe.COM" 1-APR-1994 21:46:46.26

To: Adam Gamoran <GAMORAN>

CC:

Subj: Revised Workplan

Dear Adam,

You've done a wonderful [and fast!] job in integrating complex feedback into revision. Bravo Here are a few suggestions for clarity.

IB. Since the idea of an LC project encompasses pilot projects, why not just talk about LC projects? Anything to simplify language is helpful, I think

IC. Suggest first sentence read "...conduct interviews to develop conceptualization and establish criteria by which..." The word "conceptual" can then be deleted in next sentence.

IIA. This would interfere with chronology, but you might consider putting interview studies together and integrated reports together. It would read a little better.

In second paragraph, first sentence, should "survey" read "surveys?" Also, last sentence may have some implications for my report.

At present, I have not designed discussion to separate principals and teachers throughout. Will this make your job harder?

IIB. Since the Institutional Profiles will have ramifications both institutionally and communally, you might consider including both where applicable. Namely, in first purpose, you could say, "To provide information for institutional and communal planning." In purpose three, include institutions. I know the institutions will not be engaged in full self-study process, but even collecting the data we are asking of them provides them with an opportunity to reflect. I think the idea of "reflective institutions" is compelling and fits with CIJE's agenda in that by becoming more reflective, they could also become less parochial [think in broader terms than just their own interests]. I realize this is my preference, but I would like it considered.

Next paragraph: if we develop an instrument that is useful to all institutions and that all can fill out, do we need to specify priorities? I am thinking we can cross that bridge when we come to it.

Next paragraph: There still is not a reference to our discovering what data communities routinely collect on their institutions [or subsets thereof]. This should probably be included. Also, guidelines are not mentioned. Is this an error of omission or commission?

All for now. Please do not forget to give Liz my best. Tell her I can actually carry on a simple conversation in Hebrew as long as it is confined to the four groups of verbs I have learned thus far and does not involve the future tense. I am planning on going to Israel this summer at the same time as [but not necessarily with] the Machon L'Morim folks. My Hebrew teacher and her family will be in Jerusalem at that time so I won't be completely at sea. Have a grand time at AERA. I would love a copy of your presentation[s], when you get back. Shalom rav, Julie

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MEF Work Plan
April 1, 1994 - December 31, 1994

This work plan is an extension of the plan submitted in July 1993, which described work to be performed through July 1994. An important revision to the earlier plan is that the study of goals for educational change now runs through all the components of the work plan.

I. Ongoing Monitoring

A. Monitoring and Evaluation of the Personnel Action Plan

This component of the project will emphasize monitoring and evaluation of the development and implementation of a personnel action plan in each lead community. We are concerned with questions such as:

1. How was the plan developed? Who participated, who did not, and what was the process?
2. What information was used to develop the plan? In particular, were MEF reports used, and if so, how? What other data are on record for targeted institutions, programs, and persons?
3. Does the action plan include specific goals for the enhancement of personnel? What are its goals and purposes? How will progress towards the goals be evaluated?
4. In what way is the plan innovative? How will it change the Jewish educator work force in the community?
4. What is the timeline for the plan?
5. What funding provisions have been made or are intended for implementing the plan?

B. Monitoring and Evaluation of Lead Community Projects

As Lead Community Projects are developed (probably beginning with pilot projects), we will work with community leaders to establish standards of scope, quality, and content by which the projects can be evaluated. Subsequently, we will engage in active monitoring leading to the evaluation of pilot projects according to these standards.

C. Monitoring of Community Mobilization

As proposed by our advisory board, we will conduct interviews to establish criteria by which community mobilization can be evaluated. This will result in a conceptual paper outlining the concepts and measures of mobilization.

In addition, we will continue to monitor the emergence of goals for Jewish education in the Lead Communities, through observations at meetings and discussions with educators, lay leaders, and community professionals.

II. Community Profiles

A. Educator Surveys and Interviews

Educators in formal settings have been surveyed in all three communities. Reports on interviews with Milwaukee and Atlanta educators were released last fall, and a report integrating interview and survey data on Milwaukee teachers, with guidance for policy, was issued this spring. A report on interviews with Baltimore educators is under preparation. Also, analyses of survey data on teachers in Baltimore and Atlanta are underway. This summer we will prepare reports for Baltimore and Atlanta that combine the survey and interview data on teachers, leading to policy recommendations for these communities.

As soon as the data processing equipment becomes available, we will analyze data from the educational leader survey, beginning with data from Milwaukee. Assuming the equipment is available no later than June 1, we will analyze the data during the summer. In the fall, we will produce a report for each community that combines interview and survey data on educational leaders.

B. Institutional Profiles

We are preparing to construct profiles of educational institutions in the three lead communities, as outlined in the CIJE Planning Guide. This project will gather data about the extent, size, nature, and resources of Jewish educational programs, such as who is served, what programs are offered, how the programs are funded, and so on. The project serves three purposes:

1. To provide information for planning purposes. As goals for Jewish education are identified, information on the current state of Jewish education will make it possible to map out a plan for moving from the current situation towards the desired goals.
2. To establish a baseline so that subsequent changes in the provision of Jewish education can be measured against an initial starting point.
3. To engage the community in a self-study process, nurturing "reflective communities" and helping to foster mobilization.

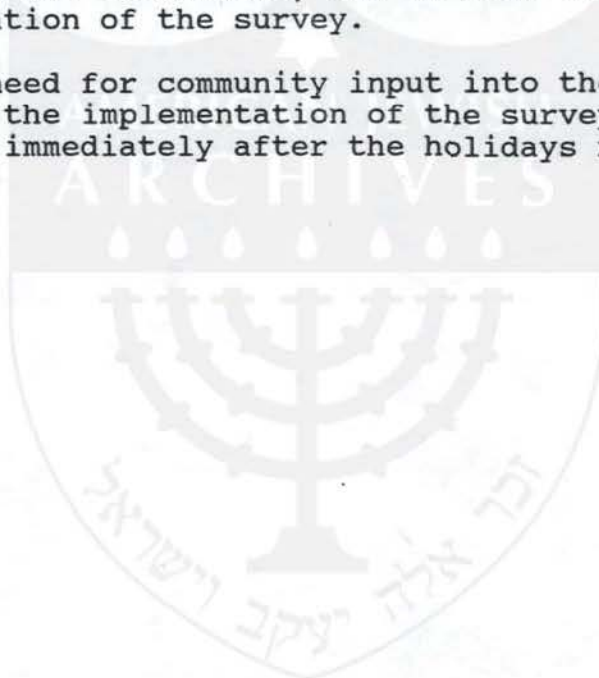
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Institutions targeted in ~~community~~ action plans, and institutions participating in lead community goal-setting processes, will receive priority for participation in the institutional profiles.

Our current plan of work in this domain is as follows: First, we will elaborate on the three purposes of the project in a more detailed proposal which is currently under preparation. Second, we will conduct telephone interviews with experts, including Jewish educators and administrators of communal agencies, to help us settle on the indicators that should be incorporated into the institutional profiles. (As a starting point, we are thinking about the items listed in Box 4, p. 12, of the Planning Guide). Third, we will draft a survey instrument for data collection. Fourth, we will meet with community leaders to obtain their input on the content of the instrument, and to seek their participation in the administration of the survey.

In light of the need for community input into the design, and participation in the implementation of the survey, we expect to ~~field~~ the survey immediately after the holidays next fall.

administer



Products and Time Line

DATE	PRODUCT	PERSON(S) RESPONSIBLE
April 15	Proposal to develop institutional profiles	Bill Robinson
April 30	Revised report on mobilization in Milwaukee	Roberta Goodman
April 30	Revised report on mobilization in Baltimore	Julie Tammivaara
May 31 June 30	Draft instrument for institutional profiles	Bill Robinson
May 31	Report on mobilization in Atlanta	Roberta Goodman
May 31	Report on professional lives of Jewish educators in Baltimore	Julie Tammivaara
June 30	Interview protocol for studying concepts and measures of mobilization	Roberta Goodman, Julie Tammivaara
June 30	Report on Baltimore teaching force	Adam Gamoran, Ellen Goldring, Julie Tammivaara
August 31	Report on Atlanta teaching force	Adam Gamoran, Ellen Goldring, Bill Robinson
September 30	Paper on Jewish community mobilization: concepts and measures	Roberta Goodman, Julie Tammivaara, Bill Robinson
September 30	Report on educational leaders in Milwaukee	Adam Gamoran, Ellen Goldring, Roberta Goodman, Bill Robinson
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December 31	Reports on progress of personnel action plans in Atlanta, Baltimore, and Milwaukee	Julie Tammivaara, Roberta Goodman, Bill Robinson
December 31	Paper on teaching force in all three communities	Adam Gamoran, Ellen Goldring, Roberta Goodman, Bill Robinson, Julie Tammivaara
December 31	Proposal to survey institutional practices	Bill Robinson

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MEF Work Plan
April 1, 1994 - December 31, 1994

This work plan is an extension of the plan submitted in July 1993, which described work to be performed through July 1994. An important revision to the earlier plan is that the study of goals for educational change now runs through all the components of the work plan.

I. Ongoing Monitoring and Evaluation

A. Monitoring and Evaluation of the Personnel Action Plan

This component of the project will emphasize monitoring and evaluation of the development and implementation of a personnel action plan in each Lead Community. We are concerned with questions such as:

1. How was the plan developed? Who participated, who did not, and what was the process?
2. What information was used to develop the plan? In particular, were MEF reports used, and if so, how? What other data are on record for targeted institutions, programs, and persons?
3. Does the action plan include specific goals for the enhancement of personnel? What are its goals and purposes? How will progress towards the goals be evaluated?
4. In what way is the plan innovative? How will it change the Jewish educator work force in the community?
4. What is the timeline for the plan?
5. What funding provisions have been made or are intended for implementing the plan?

B. Monitoring and Evaluation of Lead Community Projects

As Lead Community Projects are developed (probably beginning with pilot projects), we will work with community leaders to establish standards of scope, quality, and content by which the projects can be evaluated. Subsequently, we will engage in active monitoring leading to the evaluation of Lead Community Projects according to these standards.

C. Monitoring of Community Mobilization

As proposed by our advisory board, we will conduct interviews to develop conceptions and establish criteria by which community mobilization can be evaluated. This will result in a paper outlining the concepts and measures of mobilization.

In addition, we will continue to monitor the emergence of goals for Jewish education in the Lead Communities, through observations at meetings and discussions with educators, lay leaders, and community professionals.

II. Community Profiles

A. Educator Surveys and Interviews

Educators in formal settings have been surveyed in all three communities. Reports on interviews with Milwaukee and Atlanta educators were released last fall, and a report on interviews with Baltimore educators is under preparation. A report integrating interview and survey data on Milwaukee teachers, with guidance for policy, was issued this spring, and analyses of survey data on teachers in Baltimore and Atlanta are underway. This summer we will prepare reports for Baltimore and Atlanta that combine the survey and interview data on teachers, leading to policy recommendations for these communities.

As soon as the data processing equipment becomes available, we will analyze data from the educational leader surveys, beginning with data from Milwaukee. Assuming the equipment is available no later than June 1, we will analyze the data during the summer. In the fall, we will produce a report for each community that combines interview and survey data on educational leaders.

B. Institutional Profiles

We are preparing to construct profiles of educational institutions in the three Lead Communities, as outlined in the CIJE Planning Guide. This project will gather data about the extent, size, nature, and resources of Jewish educational programs, such as who is served, what programs are offered, how the programs are funded, and so on. The project serves three purposes:

1. To provide information for communal and institutional planning. As goals for Jewish education are identified, information on the current state of Jewish education will make it possible to map out a plan for moving from the current situation towards the desired goals.
2. To establish a baseline so that subsequent changes in the provision of Jewish education can be measured against an initial starting point.
3. To engage the communities and their institutions in a self-study process, nurturing "reflective communities" and helping to foster mobilization.

Both formal and informal educational programs will be included in the institutional profiles. Institutions targeted in community action plans, and institutions participating in Lead

Community goal-setting processes, will receive priority for participation in the institutional profiles.

Our current plan of work in this domain is as follows: First, we will elaborate on the three purposes of the project in a more detailed proposal which is currently under preparation. Second, we will conduct telephone interviews with experts, including Jewish educators and administrators of communal agencies, to help us settle on the indicators that should be incorporated into the institutional profiles. (As a starting point, we are thinking about the items listed in Box 4, p. 12, of the Planning Guide). During this period, we will also meet with community leaders to find out what data are already available or routinely collected. Third, we will draft a survey instrument for data collection. Fourth, we will meet with community leaders to obtain their input on the content of the instrument, and to seek their participation in the administration of the survey.

In light of the need for community input into the design, and participation in the implementation of the survey, we expect to administer the survey immediately after the holidays next fall.



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August 25, 1994

Sent via e-mail to MEF field researchers:

I'm writing you from the plane after the meetings in Cleveland. We are moving house on Friday and through the weekend, so I'm not sure when I'll be able to send this, or read e-mail again -- probably not 'till Monday. In this message I'll try to summarize the key outcomes of the MEF meeting.

1) The work plan for Aug - Dec 1994 we discussed in our last conference call was accepted. That is, the MEF team is expected to fulfill the following tasks:

a. "Research Brief" on background and training of teachers in Jewish schools. Present to GA in November. Dry run to CIJE Board on October 5-6. Responsibilities: Bill, data analyses; Adam/Ellen, first draft of text. We spent a lot of time talking about the content and tone of this Brief. COMPLETED.

b. "The Teaching Force of Atlanta's Jewish Schools. (Integrated report for Atlanta.) Deadline for draft: September 30. Responsibilities: Adam/Ellen, first draft of text; all, comments and suggestions on text. COMPLETED.

c. Cross-community integrated report on teachers in Jewish schools. Deadline: December 31. Responsibilities: Bill, data analysis. Adam and Ellen, first draft of text. DELAYED.

d. Mobilization reports on Milwaukee and Atlanta. I was questioned on why these were not completed. They should be done as soon as possible. I was asked for a definite date on when they would be done, and was embarrassed not to be able to give one. In particular, there was interest in the Atlanta report since they have not seen it at all yet. Can we say, September 14 for Milwaukee and October 4 for Atlanta? Responsibility: Roberta. Julie will also contribute. COMPLETED, ENCLOSED.

e. Professional lives of Jewish educators in Baltimore. Julie, you've got the comments I received from Annette. She was very favorable, with a few suggestions. Apparently there are comments coming from Gail also. Mike Inbar said it was "very very good," and offered only one comment: In describing the respondents, we should make comparison to the survey of teachers, to point out departures from representativeness. This is not to say the interview sample was a random one, only to point out how it differs from the community as a whole. I thought this was a good idea for a footnote. It would work for teachers, not principals, since we haven't looked at the principal survey data. Deadline:

Would Sept. 15 be reasonable? (Assuming comments from Gail come soon.) Responsibility: Julie. COMPLETED.

f. Revision of Baltimore integrated report: Thanks much for all the feedback, Julie. I'll send you a revision in a couple of weeks. It will say, among other things, that of teachers in Orthodox day schools, something like 28% have a college or university degree in education, and 31% have seminary or institute degrees in education (as opposed to 59% with degrees in education!). You called that one right! COMPLETED.

g. Monitoring of development and implementation of Personnel Action Plans in Atlanta, Baltimore, Milwaukee. We will provide a written update for each community to CIJE on this subject on December 31. This will not be a full-blown report, but it should be detailed enough to provide a solid record of what's happened on this front. Responsibilities: Julie, Roberta, Bill. (Related to this, Roberta can attend the Leadership Seminar, assuming the Milwaukee and Atlanta reports are finished.) We should view the Leadership Seminar as part of the Personnel Action Plan, in the sense of "the action before the action plan." COMPLETED, ENCLOSED.

h. Monitoring and evaluation of Machon L'Morim and the Peer Coaching project in Milwaukee day schools. We didn't really discuss these, but it is clear to me we can continue as planned. I did bring them into the discussion of getting the communities to pay for field research (see below). COMPLETED.

i. Development of a "module" of the qualitative component of a study of educators for use by other communities. This will be a refinement of the interview protocols, with instructions on how to use them. (The protocol probably needs to be shortened, emphasizing the questions that contributed to the reports we wrote. If the questions need to be improved, now's the time to do so. Ultimate deadline is December 31, but perhaps it could be completed earlier. I propose that Julie take primary responsibility for this, with help from Roberta. COMPLETED.

j. Putting all documents, tapes, etc. in shape for CIJE storage. Deadline, December 31. Responsibilities: Julie, Roberta, Bill. (But Bill has much less stuff.) COMPLETED.

k. Research papers on Teacher Power and on Professional Development. This is legitimate to work on, and you can travel to collaborate, but we have to make sure the other tasks get done. Responsibilities: Julie, Roberta. DELAYED.

At first glance this appears to be a long list, but much of it is almost finished or well underway. Still, I'm sure it will keep

us busy for the next four months. Note that institutional profiles is not in this work plan at present.

2) Work plan for 1995. After a lengthy discussion, the committee advised Alan that the highest priorities for MEF should be:

a. Further analyses of teacher survey data, including revision of the cross-community integrated report, and possible additional "Research Briefs" if the first one is well received.

b. Analysis and write-up of educational leader survey data. UNDERWAY.

c. Completion of the "module" for studying Jewish educators in a community. This would incorporate the interview protocols and procedures which are to be completed by the end of December, as well as the survey instrument which must be revised in 1995. UNDERWAY.

d. Monitoring and evaluation of the development and implementation of Personnel Action Plans in Lead Communities.

e. Monitoring and evaluation of the Goals Project, as it is manifested in Lead Communities. (Institutional Profiles may enter here.)

(NOTE: ALAN SUBSEQUENTLY REMINDED US TO ADD "LEADING INDICATORS" AND PLANNING FOR A STUDY OF INFORMAL EDUCATION TO THIS LIST.)

Writing a cross-community mobilization report was seen as desirable but not as high priority as these items. Ditto for monitoring of community change in general, apart from these two key CIJE initiatives (goals and personnel plan).

3) The committee advised Alan to consider alternative staffing modes to field researchers (e.g., consultants who visit communities for short visits). Some were more reluctant than others to move away from field research, but the tenor of the discussion was generally not supportive of continuing CIJE-sponsored field research. Also, there are apparently budgetary factors of which I am not yet aware -- but it seems our budget will shrink dramatically after December 31.

We discussed the possibility of the communities sponsoring their own field research. I explained how that would change the relationship between the work of the field researchers and CIJE (i.e., little CIJE control). I think the message came across, and to the extent it did, it was not seen as a positive factor. Still, they would very much like the communities to pay for evaluation. Some thought this would occur, while others were

skeptical. All agreed that Alan has a serious task ahead if he is to convince the communities to do so.

My conclusion is that there has been no change in CIJE's decision that CIJE will no longer pay for ongoing field research after December 31. At best, they will pay for a CIJE survey data analyst. The notion of a 50/50 split (CIJE/community) for field researchers was not completely ruled out, but I would not be optimistic about it.



Alan Hoffmann
CIJE

212 532-2646

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1 800 232-1234

Ref # ED66236

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g. conceptualizat of informal educ

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*Summarize discussion
give timeline
give first-cut budget,
incl A+E time
incl A+E non
MEF*

*tell J & B CISE has
no contract to offer
t11 Bill we're reg f-t
- Alan negotiating w/ funders*

*Most - early Oct
communs - soon after*

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Alan told Jane and Louise this summer, that CIJE will not pay for field research after December 31. Their reaction: Thanks for giving us this much notice. Alan has not said anything to anyone in Baltimore or Atlanta.

My conclusion is that there has been no change in CIJE's decision that CIJE will no longer pay for ongoing field research after December 31. At best, they will pay for a CIJE survey data analyst. The notion of a 50/50 split (CIJE/community) for field researchers was not completely ruled out, but I would not be optimistic about it.

I have a follow-up phone call with Alan scheduled for Wednesday, August 31. In that call, I will press for clarification on this. In particular, I will press to learn whether he will make a serious attempt to convince the communities to support ongoing evaluation, or whether he's just going to tell them CIJE's position and leave it at that.

October 1, 1994

To: Alan
From: Adam
Re: Work Plan (attached)

Attached is our proposed work plan for MEF for 1995. It covers the work recommended by the advisory committee and elaborated in our phone conversation.

Fixed. / A budget is also attached. Once again I must protest your practice of asking me to submit a budget every six months or so (our last was submitted April 1, 1994) without providing me the information necessary to monitor our expenditures against the previous approved budget.



To: Alan Hoffmann

From: Adam Gamoran and Ellen Goldring

CC: MEF Advisory Committee Members

Re: MEF Work Plan for 1995

Date: October 1, 1994

This memo describes our proposed plan for the Monitoring, Evaluation and Feedback Project for next year, January 1 to December 31, 1995. The plan was developed after consultation with our advisory committee and follow-up discussions with you. It organizes our work into three areas: 1) Analysis and dissemination of Lead Community data and methods; 2) Monitoring and evaluation of CIJE-initiated projects; 3) Monitoring Lead Communities through "Leading Educational Indicators."

1) DISSEMINATION OF CIJE DATA AND METHODS

a. Further analysis of teachers in Lead Communities

We propose to continue analyzing and writing about the teachers in Lead Communities using the survey data. Our precise task for 1995-96 depends on how the first Research Brief is received in 1994. If that is well-received, we will either draft a full report in 1994, revise and complete it in 1995, and write new Research Briefs in 1995, or we will begin immediately writing additional Research Briefs, and continue that as well as writing a full report in 1995. Even if we first produce more Research Briefs, we will complete the full report by the end of 1995. Possible topics for additional Research Briefs include:

- Salaries and Benefits of Teachers in Jewish Schools (I'd give this highest priority)
- Career Opportunities and Plans of Teachers in Jewish Schools
- What Do Teachers Want to Know? Teachers' Preferences for Professional Development

b. Analysis of survey data on educational leaders

In the Lead Communities, we surveyed the educational directors, but we have not yet had an opportunity to analyze this data. During 1995, we will analyze and report on the characteristics of educational directors in the Lead Communities. We will produce a brief, separate report for each community, as well as a report for CIJE based on data from all three communities.

c. Research papers on teacher power and on in-service experiences

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.

d. Development of a "module" for studying educators in a Jewish community

Many other communities would like to use our methods to study their own educators. It is important that we make our procedures, survey materials, and interview protocols available to the public. To do this, we need to spend time revising the surveys and writing descriptions of the procedures.

2) MONITORING AND EVALUATION OF CIJE-INITIATED PROJECTS

Beginning in 1995, we will no longer conduct day-to-day monitoring of the Lead Communities. However, we will monitor and evaluate the progress of two important CIJE projects: the development and implementation of Personnel Action Plans, and the Goals Project. We will primarily examine the Lead Communities, but we will attend to other locations that may become involved in these projects to the extent our staffing permits.

To monitor these projects, we will hire a half-time researcher to make periodic visits to the Lead Communities (and possibly elsewhere) to interview key informants and write reports on the extent to which these projects are having an impact on Jewish education in the communities. (Depending on staff availability, we may hire more than one person and divide the task, but we will limit our cost to that of one half-time researcher.)

CIJE may soon begin to work with informal educational programs, and we have at present no design for the study of informal education. During 1995, we will work on conceptualizing an appropriate way for CIJE to study informal education.

3) LEADING EDUCATIONAL INDICATORS

Our advisory board suggested that in place of day-to-day monitoring of the Lead Community process, we should develop "Leading Educational Indicators" to monitor change in the Lead Communities. They further recommended that the CIJE implementation staff decide what these indicators should be. We will propose a method for collecting the necessary data -- and collect it, if our resources permit -- as soon as we receive guidance from the CIJE implementation staff.

An example of a Leading Indicator might be the percentage of teachers in the community who are professionally trained in both education and Jewish studies. As of 1994, that figure is 21% for the three communities combined. Another indicator might be the average number of workshops attended (currently around 2 per year). A third might be the percentage of teachers who work full-time (just under a quarter, as of 1994). A fourth might be the percentage of full-time teachers who are eligible for health benefits (around 20% in 1994).

4) CONCLUSION: TOWARDS A RESEARCH CAPACITY

Through this plan, we will be moving towards a CIJE research capacity in two ways. First, we will begin disseminating research on Jewish education in North America that will provide a baseline and standard for future research. Second, by reducing the supervisory responsibilities of the project directors, we anticipate that beginning in fall of 1995 we will be ready to work with the CIJE Committee on Research and Evaluation to develop strategies for creating a research capacity in North America.

List of Products for 1995

- yes 1. Research Paper: "Teachers in Jewish Schools" (analysis of survey data from three communities).
- but when?
- ? 2. Research Brief: At least one new research brief on teachers, possibly more than one, depending on how they are received.
- yes 3. Reports on the characteristics of educational leaders: One for each community, and one on all three communities. - maybe a policy brief
4. Research Papers: One on teacher power, another on the quality of in-service experiences.
- yes 5. Reports on development and implementation of Personnel Action Plans and the development of "vision-driven institutions" -- one report for each community during 1995.
- yes 6. Module for "Studying Educators in a Jewish Community."
- yes 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.

Workplan for 1995

may be minor changes - check

Feb 9 mts - prepare cover memo w/ attachments

Feb 14 mts 10^{am} - 2^{pm}

review since last mts

Q15F 1995 work plan

- Common Mobilz

- Building Capacity

- M service

- goals

- senior personnel

Lunch w/ chairs

research & the workplan - rpt from MCF advisors

Bill's role

he must give us products & timelines

level I ok

2nd #

- write out what it means - how related
= how many days per week they collect it?

Level II - ok if not that much time - need balance

wait t.l after Feb 9 to confirm

The previous message was written as an update to the field researchers, but it summarizes my understanding of our meeting, and it sets an agenda for our conference call this Wednesday.

I'd like to raise a couple of additional issues for our call.

I've thought about your last comment to me, and I think you're correct: If Ellen and I were freed from supervisory activities, we would start to have time for the broader CIJE Research Agenda as the writing related to lead communities gets finished.

However, the only way to have no supervisory tasks is to have no data collected (since we cannot collect the data ourselves). It seems to us that no matter what the staffing configuration, if data are being collected, we will be kept busy managing that process. Do you mean to cease collecting data from lead communities? I think that's the real question.

If we stop using data to write about lead communities (for example, we could finish writing by next summer if we cease collecting data after December), we could begin to work on developing a research capacity, or on reaching out to the larger academic community, or both.

The problem with this mode (no new data) is that then CIJE would be working on implementation, without monitoring or evaluation -- unless you can get the communities to do the evaluation. That's fine with me, but note that CIJE would lose control of the process and product (which is also fine with me). If the communities don't evaluate their work with CIJE, then we are faced with the cessation of evaluation in lead communities, and we need to think whether this damages CIJE's long-term agenda.

If we do want to work with new data, we need some mechanism for collecting it. Although the field researchers have been weak on analysis of community dynamics, they have been decent at collecting data (at least that's Steve Hoffman's view). And, they have rapport, access, etc. in the communities. Ellen and I have tried to think about who we could get to collect the data, and we don't know anyone better. Adrienne Bank? Susan Shevitz? A hungry grad student? These are not appealing alternatives. This is not to deny the weaknesses of Julie and Roberta, nor to deny the fact that I was naive in thinking that their strengths would complement each other and their weaknesses would be mitigated. But they know what CIJE is, know the communities, and are decent at data collection. I think we should consider hiring them -- half-time, quarter-time, or as consultants, depending on how much data we want -- if we want to collect any data in 1995 (or during spring 1995).

I also want to say again that despite our reluctance due to time pressures, Ellen and I have realized the Steering Committee is important, and we are willing to come to the Steering Committee and Board meetings. Our committee chair (ELR) seems satisfied with our work, even given that for the time being we're not working beyond the lead communities. However, we can't fit the CIJE meetings into the time allotted for MEF work (we never could), so we will need to bill for the additional time. I hope you approve.

(In general, much of the MEF travel budget has gone for general CIJE meetings instead of MEF work.)

Let me take this opportunity to give you my usual reminder that I am not receiving budget or any financial information. Under these circumstances I cannot possibly monitor my budget. I suspect we are below budget again, but I can't tell for sure because I have no information. I've not received any budgetary information for more than a year, as I've reminded you and/or Ginny every few months.



From: EUNICE::"74104.3335@compuserve.com" 15-FEB-1995 17:05:14.90
To: Adam Gamoran <gamoran>
CC: Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>
Subj: Comments on Developing MEF Workplan

Adam & Ellen,

The following is an extremely LONG memo regarding the range of possible projects MEF could undertake (given the discussion at the MEF Advisory meeting). I didn't plan it to be this long, but there were a lot of issues to address. Given the overwhelming number of possibilities and our limited capacities, I wrote this to clarify to myself/ourselves the issues at play. I've highlighted the key points from the MEF Advisory meetings as they pertain to our workplan. I've also included my own "two cents" (really about \$20) on each category (i.e., Policy Briefs, The Module, Evaluation, Goals Project). I hope that you find this memo to be useful in your consideration of our future workplan. [If you prefer a summary, I listed my main suggestions at the end.]

For what it's worth... and in no particular order...

Policy Briefs -

1. There was a general sentiment that the Policy Brief on "Training & Background..." was very successful. Therefore, we should do additional ones. The main issue was which Policy Brief to do next. Salary & benefits? Educational leaders? Other? The main deciding factor seems to be in what area will Barry & Gail be able to write the policy side of the brief, and when? Thus, we realized a definite need for MEF to coordinate its workplan with the NY staff.
2. There was the general assumption that we should release our second policy brief at the next GA. However, there was no discussion of the costs and benefits of doing so (versus releasing it earlier, later, or releasing different briefs at different events).
3. A decision was made to write a complete 3-city research report on the educators data, using the individual city reports as a template. It was deemed important that the CIJE staff have this information. Dissemination beyond the CIJE staff was left undetermined.

There is a potential conflict between dissemination of a complete 3-city research report and the additional Policy Briefs. The success of the Policy Brief was based in large part on its "news-worthiness". If the additional "news" (i.e., on salary and benefits, etc.) gets out to the national lay community and Federations through dissemination of a 3-city research report, then the power of future Policy Briefs to mobilize those two groups will be dissipated.

On the other hand, disseminating the complete 3-city research report to a research audience (as Adam suggested) would help mobilize would-be Jewish education researchers. [I'm assuming that we would then make the dataset available to researchers who wanted to use it.]

The main issues are control of dissemination and timing. IDEALLY, we should release three Policy Briefs over the next year or so. For instance, we could release educational leadership at CAJE [ARE WE DOING ANYTHING TO MOBILIZE THE EDUCATIONAL COMMUNITY?] and either "salary & benefits" or "recruitment, retention & careers" at the GA, with the other one at some forum in the Spring of 1996. In the Spring (or late Winter) of 1996, we could also release the 3-city combined research report (which would treat these issues in more depth).

Obviously, our problem is a lack of capacity. Not only the MEF,

but the NY staff (Barry, Gail & Nessa) may not be able to handle this pace given other projects.

However, if we plan to release only one Policy Brief a year, then we probably can't wait until all three main Policy Briefs (as listed above) are released before disseminating the 3-city combined research report. Interest in a complete research report probably will dissipate by then. Notably, it is conceivable that interest in the Policy Briefs will begin to dissipate after this year. Thus, is it reasonable to continue dissemination at the rate of one a year? Do we really want or expect to be issuing Policy Briefs on the same dataset three years from now? (It's not like we wouldn't have anything else to do.)

Finally, it may be fruitful to consider the issue of Policy Briefs (and the research report) in the same framework as the module. Should we consider developing a national body (other than CIJE) which would continue issuing the Policy Briefs, work with researchers, AND with communities engaged in the module?

The Module - (referred to below, somewhat incorrectly, as the Educators Survey module)

1. There seems to have been a general agreement that the two goals of the module are of equal importance - building a national database, and mobilizing communities toward developing & implementing Personnel Action Plans. In order to achieve these two goals, it was suggested that we develop a module that contains "anchor items", and allows for flexibility with the rest. This places a heavy burden on whomever is working with the communities to implement the module.

2. There was a consensus toward option #2 of Ellen's memo. Though, as Annette pointed out, once you begin considering how to deal with flexibility you quickly move toward option #3.

3. A goal of CIJE is to build an institution in the US with the capacity to work with the communities in implementing the module. Most seemed to believe that this institution does not yet exist. Therefore, it MAY fall to CIJE to begin the process.

4. MEF's assignment was to construct a path by which communities can begin working with the module, under the parameters sketched above (i.e., "An off-the-rack suit with a tailor who makes everyone feel that it's made for them.").

In developing this path, I believe we must carefully consider how Federations typically do business (i.e., lay committees that want to have a say in all things at all points). This issue was raised, but not fully discussed. From my understanding, the way we did the "module" in the three communities involved limited lay involvement in development, implementation & analysis. Notably, at the MEF Advisory meeting a third alternative was suggested - no involvement (just give them the finished report). All three alternative processes are viable. We really don't know which works best. Moreover, we are probably not in a position to dictate to the communities which process they should use. It would probably be wise to plan for different communities using different processes. To do this, we would have to construct a module AND training process that runs from questionnaire construction to report writing & dissemination. [Note: At some point, Barry and Gail will have to step in to work with the communities on developing Personnel Action Plans, or provide a module & training on that half of the process as well.]

Nevertheless, none of three alternatives requires that we (CIJE or the envisioned other national body) meet intensively with the

communities beyond a core group who come for training. None of the three would require us to do any of the implementation, analysis, or report writing. It would still require us to be available for consultations. The reason for this is that each community (i.e., Federation) can either provide staff to do the process or (more likely) hire an outside consultant.

Based on my (albeit limited) understanding, staff-lay relations at Federations do not permit the staff to be as directive with the module as we would want (in order to assure the stability of anchor items). Lay leadership would have to do this. However, they often depend upon an outside consultant to come in and "work the community". This does NOT have to be us. They could hire an outside consultant who we would train as a team with the key Federation staff & lay persons. Notably, this may even contribute to building local research capacities across the nation.

While it may decide to allow for choice, it would be worthwhile for us to know which alternative processes work best and why. [Also, recognizing that one alternative may work for one community and not for another.] Currently, we don't have examples of the alternatives (to the way we did it with the three communities), though there may be differences between the three that we could explore. Also, we could compare the experiences of the three lead communities with the Educators Survey to their experiences with other research projects they may have underwent during the same time period. (This would be easy for me to do in Atlanta.)

I suggest that we consider a plan for monitoring (though NOT through intensive immersion) the processes by which the new communities use the module and evaluating their progress. We can begin designing this project as an evaluation of the progress that has been made by our three lead communities. Moreover, we should see this evaluation process ultimately becoming a self-study module which would accompany the Educators Survey module. I'll discuss this further below, in the section labelled "Evaluation".

Finally, there is the issue of how to assure that communities will provide us with useable data on our "anchor items". In the above scenario, there are a few incentives. First, we are offering the communities a complete module, training and occasional consultations on how to move the community from survey to PAP. This will have to be at a competitive price. Second, having CIJE (or some national body) be connected to their local planning activities should be considered of high value, especially if we were available to come to their community at key moments (i.e., beginning, presentation of PAP). Finally, as Nessa raised, there is the moral imperative to assist in the building of a national database.

NOTE: It seems reasonable that we would have to pilot this whole project for one year. This would hopefully give us (Alan) enough time to find another national body who could take it over, and then train them.

Evaluation -

1. We probably reached the least consensus on this issue. What do we want to evaluate? Communal level change across the continent in terms of educational output? This would involve a substantial long-term commitment. Currently and in the near future, I don't even think our three "Lead" communities would show any change in this area. An alternative was suggested - evaluate the development and implementation of their Personnel Action Plans. Barry and Gail could conceptualize measures of effective or successful PAPs. Additionally, Mike had suggested the need to make these measure relevant to the

communities' decision-making processes.

2. We also entered into a discussion of evaluating CIJE. But, what this means is uncertain. Does it mean evaluating the progress of the three lead communities? Evaluating whether CIJE's efforts produced any desirable (or undesirable) effects, that would not have occurred otherwise? Testing the assumptions of CIJE's lead community project? Evaluating CIJE as an institution (i.e., what are its goals, is it set-up properly to realize them)?

3. It seems that we did agree to examine the updates (and earlier reports?) at the next MEF Advisory meeting. But, for what purpose? Can we envision what results could occur from this? And what needs to be put in place, so that fruitful results do occur?

4. The idea of an extensive meeting in Jerusalem to evaluate CIJE was put forth, but not agreed upon.

To begin with, I have three succinct comments on this. 1)The staff, consultants, and advisors of CIJE are far from being in agreement as to what should be evaluated. 2)Which of the possible evaluations do we (MEF) have the capacity and expertise to undertake? 3)Are the institutional structures/relationships in place within CIJE that will allow our analysis to be carefully and substantially discussed, decisions to be reached and changes to be implemented? I believe we must carefully consider these three points before committing to any work.

With that in mind, I think our best option is to evaluate the three lead communities' progress in 1)building the capacity for change (e.g., shared vision, increased availability for funding), and 2)implementing quality (according to Barry & Gail) Personnel Action Plans. This would be useful to the communities (ala Mike's point on decision-making relevance). We have the capacity and expertise for this. [There is no need for intensive immersion. Structured interviews and/or mixed quantitative/qualitative questionnaires could be used. I sketched out some parts of this to Adam at dinner after the meeting.]

The instruments and process by which we evaluate the three lead communities could then be adapted to evaluate the progress of any communities which choose to use the Educators Survey module (as I suggested above). As more communities "come on line" with CIJE or partake of the "module", it becomes even more important to have the tools by which we can assess progress in these areas and (hopefully) discern what works, what doesn't, where and why?

Concerning other types of evaluation, I think we should be wary of evaluating CIJE. Obviously, the line between evaluating the communities and evaluating CIJE is unclear. But, we should probably stay on the "community" side. I'm sure some serious reflection on CIJE's basic assumptions and its internal structure would be useful. But, we don't have the organization development expertise to examine CIJE's internal structures and I'm not sure it would be well received.

Goals Project -

1. Two basic avenues of research were suggested: Institutional Profiles and evaluation of the assumptions of the Goals Project.

2. Based on Marom's three suggestions, I think there are three possible areas in which Institutional Profiles could focus: 1) what community (or institutional?) goals already exist; 2)process evaluation; 3)evaluation of outcomes (i.e., goals and their embeddedness within an community/institution).

3. They envision beginning work with institutions in

September of 1995. If we do any research within the Goals Project, it will require those involved with the Goals Project to adjust their workplans to allow for cooperative development of whatever instruments are needed.

Obviously, I am very supportive of developing and implementing some form of the Institutional Profiles. Given our limited capacity, it should involve as little work as reasonable on our part to implement and analyze (i.e., self-study). But, I think it will provide us with an instrument & process that is as useful as the Educators Survey. As I've eluded to in the past, the greatest irony of this discussion is that engaging institutions in "taking stock" or evaluation is a useful way of getting them to consider goals.

I think we could also use the Institutional Profiles as a means of evaluating the assumptions of the Goals Project. For example, the IPs could include those outcome indicators that CIJE believes should (eventually) change as the institution becomes more vision-driven (whatever they may be). We would only need the institution to "re-take stock" in (say) three years.

One research caveat: we should be aware that the process of "taking stock" or any IP research may affect the institutions. Therefore, it may be worth considering alternative types of research designs to control for this.

In summary, ...

I have made the following suggestions:

1. Three Policy Briefs over the next 15 months. This will involve a substantial commitment on the part of the NY staff.
2. Write a 3-city combined research report. Issues of dissemination (who? When?) should be considered in relation to the goals of the Policy Brief dissemination.
3. In planning for a national body to work with communities on the Educators Survey module, consider that this body may also be issuing Policy Briefs, working with researchers on research reports, as well as working with communities in evaluating their progress (through an envisioned evaluation module). Moreover, some body will still need to work with the communities in planning and implementing Personnel Action Plans.
4. Develop a module AND training process that runs from questionnaire construction through to report writing.
5. Work with Barry & Gail to develop the instrumentation and process by which we can evaluate our three lead communities' progress. The areas of focus should be a) creating the capacity for change, and b) developing & implementing quality PAP's. This instrumentation and process should then be adapted for use as a module, for use by other communities engaged in using the Educators Survey module.
6. Do NOT engage in any other forms of evaluation at this point.
7. Work with Dan & Dan (and the staff) to develop some form of Institutional Profile to be used in the Goals Project. Use this IP as the instrument by which the assumptions of the Goals Project can be tested.

Obviously, we (MEF and the CIJE staff & consultants) don't have the capacity to do all of these!!! If something has to go, I tentatively (and with uncertainty) suggest holding off on evaluating the communities progress. The reason for this is simply that no one (outside of CIJE) expects us to do this. On the other hand, we have commitments to

generate Policy Briefs and provide the module for communities to use. Moreover, the longer we take to issue Policy Briefs the more interest may decline. Of course, the obstacle to moving along with the Policy Briefs is the availability of the NY staff to do the policy half and edit the whole thing. Concerning the Goals Project, our (MEF) schedule is really dependent upon the Goals Project team. If they keep with their current plans, we may need to have something ready for September of 1995.

Given the above scenario, our largest undertaking would be in working with the communities in using the module, even if we focus on training community teams. Personally, I think this would be an interesting process in which to be involved. Nevertheless, we may need to bring in additional personnel. Ideally, this person (or persons) would become the program administrator(s) at whatever national body takes on the project.

Notably, I did not mention the Educational Leader's report or the memo on the updates. These seem to be straightforward at this point. As far as I understand, my own workplan is currently as follows.

High priority -

1. Write a draft report (based on your input) on the Educational Leaders, using the Educators reports as a template.
2. Receive and integrate additional suggestions (from advisors and staff) into the Educators Survey. Also, we need to consider what (if any) changes need to be made to the Educators survey to be able to give it to educational leaders. And, depending on decisions made about the module, develop a coding and analysis component.

Medium Priority -

3. Write a memo comparing the issues raised in my update to Roberta's report on Atlanta, and then extend the analysis to the other two updates.
4. Write a 3-city combined research report, using the educators reports as a template.
5. Continue monitoring Atlanta's progress.

Well, that's certainly a lot of comments. Just one last (Pandora's Box) question - what are our responsibilities to the new communities joining CIJE (i.e., Hartford)?

No need to respond to my suggestions. I sent this simply to assist you in deciding on the workplan (and to get my "two cents" in). Thanks!

Bill

1995 Workplan on Monitoring, Evaluation, and Feedback

March 8th Version

I. Building a Research Capacity in North America

A. Conducting high-quality research

1. Writing the full integrated report on teachers in the lead communities
2. Writing reports on educational leaders in the lead communities (in each lead community, and combined)
3. Possibly additional policy briefs -- to be decided -- possible topics: salaries/benefits, leaders
4. Research papers on teacher power, teacher in-service, and levers for change in extent of in-service

B. Convening a consultation on the necessary infrastructure and/or preferred objectives of research on Jewish education in the United States, probably in the context of the Board Subcommittee on Research and Evaluation.

II. Building an Evaluation Capacity in North America

A. The CIJE Module for the Study of Educators

1. Produce via desk-top publishing a module for studying Jewish educators in a community.
 - a. Survey instrument
 - b. Interview protocol
 - c. Instructions for both
2. Will identify anchor items to be used in a national data base.

B. Dissemination of the module -- The preferred design also addresses the broader need for creating a capacity for evaluation in North American communities: A three-tiered seminar on evaluation.

1. First tier -- for high-level community consultants, e.g. Sam Weinburg.
2. Second tier -- for committed lay leaders and federation professionals, e.g. Chuck Ratner, Mark Gurvis.
3. Third tier -- for persons who will be entering and analyzing survey data, and/or conducting interviews.

4. Note: this plan falls somewhere between options 2 (centralized agency) and 3 (comprehensive package) from the memo of Feb.9. It has a central address (CIJE), and it offers a comprehensive package, but also provides consultation in implementing the package. Moreover it develops the local capacity to implement and interpret the module.

C. What the Evaluation Seminar would need to get off the ground.

1. A CIJE staff member to coordinate it -- probably a new half-time position.
2. New York staff responsibilities
 - a. test the market -- is this what our clients want?
 - b. hire the coordinator
 - c. work with the coordinator, do some of the teaching
3. MEF staff responsibilities
 - a. work with the coordinator, do some of the teaching, write much of the curriculum (at least for the first year).

D. Scope of the program

1. In year one -- focus on the module for the study of educators
2. In subsequent years -- work on the other areas -- to be determined based on decisions on CIJE's future initiatives.
3. Client needs may require a broader curriculum in the first year. However, it is not clear whether we will have the capacity to offer a broader curriculum yet.

III. Evaluating Our Own Work

A. Options we rejected

1. After discussion, we decided not to evaluate the Personnel Action Plans per se. We decided the evaluation would be largely trivial, the Plans may well be flawed, and the evaluation would be too process-oriented and not sufficiently outcome-oriented.
2. We also decided not to take a direct hand in evaluating programs such as Machon L'Morim. We are not confident enough about the scope, content, and quality of such programs to make the evaluation fully worthwhile for our own purposes. However, we will encourage and provide consultation

for such programs to include evaluation components of their own.

B. Options we accepted

1. We decided that CIJE's MEF team should evaluate CIJE's two major initiatives: The training of trainers, and the training of goals coaches.
2. Exactly what this evaluation entails needs to be developed. The first step is for the NY staff (for training of trainers) and Dan Pekarsky (for training of goals coaches) to articulate the objectives of the programs, and tell us where and when the programs are taking place, so we can begin to design an evaluation.

IV. Planning for the Future

- A. New York staff will consider what future policy issues they want to undertake, so MEF staff can produce relevant information. E.g.'s -- salaries/benefits; characteristics of leaders; community mobilization. First, MEF staff will provide a menu of possible topics.
- B. Informal education -- MEF staff will work on conceptualization for policy research on informal education
- C. Possible Jerusalem seminar on CIJE: What have we learned from three years of MEF?
 - about mobilizing communities
 - about creating and working as a change agent
 - about conducting MEF in communities
 - The purpose of the seminar would be to take a step back and assess where we have been and what we have learned over the last three years. It is intended for staff and close advisors. One product of the seminar would be a summary document about what we have learned, for our internal use and for orienting new advisory committee members. A research paper might also result from the seminar, but we are not sure about that.
 - Running this seminar would take a substantial investment of planning time from MEF staff.

V. Products -- the original list of seven products remains, but one item has been deleted: Item #5, Reports on Personnel Action Plans and on vision-driven institutions in the Lead Communities will not be done. Instead, there will be some sort of evaluation report on the training of trainers and the training of goals coaches. The new list of products is:

1. Research paper: "Teachers in Jewish Schools" (analysis of survey data from three communities). Deadline: July.

2. Policy Brief -- TO BE DECIDED
3. Reports on the characteristics of educational leaders: One for each community, and one on all three communities. Deadlines: May.
4. Research papers: One on teacher power, another on the quality of inservice experiences.
5. Reports on training of trainers and on training of goals coaches -- OBJECTIVES AND PLAN TO BE SPECIFIED.
6. Module for "Studying Educators in a Jewish Community." Deadline: April 1.
7. Proposal for collecting data on Leading Indicators, in response to decisions of the CIJE implementation staff.



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**Council for Initiatives
in
Jewish Education**

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No. of Pages (incl. cover): 14

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GOALS, MONITORING, EVALUATION, AND FEEDBACK IN CIJE COMMUNITIES

A THREE YEAR OUTLINE

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

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

The successor to the Commission, the Council for Initiatives in Jewish Education (CIJE), established three lead communities to carry out the strategic plan.

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

At the same time CIJE recognizes that much of what passes for Jewish education today is often lacking in any sense of direction, much less a compelling sense of direction. That is, the enterprise is not informed by a coherent sense of what it is that one wants to achieve. This undermines efforts at education in a variety of significant ways. Absent a clear sense of what it is one wants to achieve in Jewish education, there can be no thoughtful basis for deciding such basic matters as the organization of the educational environment, assessing achievement and instruction, and the appropriate kind of pedagogy, the kinds of curricular materials that are appropriate, and the kinds of characteristics that are desirable in educators. Nor, in the absence of a clear sense of what one hopes to achieve, is there a reasonable basis for evaluating our efforts at education and making recommendations for reform.

This proposal describes a two-pronged plan for monitoring, evaluation and feedback in lead communities and for systematic development of vision-driven institutions through a Goals Project.

A. MONITORING, EVALUATION AND FEEDBACK

MEF emphasizes three aspects of educational change in lead communities:

- (1) What is the process of change in lead communities? This calls for field research in the lead communities. It requires a combination of qualitative and quantitative data, and offers formative as well as summative evaluation -- that is, feedback as well as monitoring for the lead communities.
- (2) What are the outcomes of change in lead communities? Does the project emphasize increased participation? Should we expect a rise in general Jewish literacy? Such questions are especially challenging because the specific outcomes have yet to be defined. By asking about goals (cognitive, emotional and interpersonal) in lead communities the evaluation project will stimulate participants to think about their own vision and establish a standard by which changes can be measured in later years.
- (3) Who are the educational personnel of the lead communities? What is their Jewish background and how they have been trained in Jewish and general education? Do they work full-time or part-time and how are they compensated? How much in-service support do they receive?

Field Research in Lead Communities

Studying the process of change in lead communities is a major component of the CIJE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years.

For example, let us suppose community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation.

A team of three full-time field researchers will be hired. Initially, the field researchers will be principally concerned with two questions:

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

Field researchers will address these questions in the following ways:

- 1. Supplement community self-studies with additional quantitative data to be determined following a review of the self-studies in all of the lead communities.
- 2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.
- 3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system.
- 4. Report on a regular basis to provide feedback for participants in the lead communities.
- 5. Write periodic reports describing and interpreting the process and products of change to date.

6. Replicate the initial data collection a year later and issue a report which would describe educational changes that occurred during the two years, and present an assessment of the extent to which goals are being addressed.

The Educators Survey

A survey instrument will be developed and administered to all educators in CIJE communities in day schools, supplementary schools, pre-school programs and informal educational frameworks.

The survey will provide baseline data in several critical domains:

- a. Total number of educators in each community.
- b. Percentage of part-time vs. full-time educators.
- c. Path of entry to Jewish education as an indication of a career path.
- d. Turnover rates and stability in the Jewish educational profession.
- e. Breakdown of educators (rather than through institutions) among the denomination.
- f. A detailed breakdown of compensation and benefits of Jewish educators in each community.
- g. Professional training of educators in general education and specifically in Jewish education.
- h. Levels of in-service training and their comparison to those in general education in that city, state or nationally.

These data will inevitably raise several critical issues for CIJE communities.

Amongst these are the following questions:

- a. How can the community best ensure that Jewish education is delivered by educators who are not only motivated and committed, but qualified and skilled in their subject matter and in education? This could be remedied by a

coherent, sustained system of in-service education, for which teachers are compensated and rewarded.

- b. What in-service training can be developed, given local, regional, national and Israeli Jewish and general training resources, to ensure ongoing quality training for all teachers? How can such a system address the needs of the different groups of teachers?
- c. What career opportunities can be designed to ensure the retention and advancement of the best teachers in the field of Jewish education?
- d. If positions with increased responsibilities can be created (e.g., lead teachers), will this strategy serve not only to provide career opportunities, but also as a means of continuously upgrading the community's teaching force?
- e. What can be done to increase the number of full-time teachers in various institutions?
- f. What salary and benefit policies and scales should be instituted -- differentially -- to be beneficial to the level of the teaching force and to individual teachers?

Director of Monitoring, Evaluation and Feedback

The field researchers will be guided by a director of monitoring, evaluation and feedback. The director will be responsible for providing leadership, establishing an overall vision for the project. Further responsibilities would include making final decisions in the selection of field researchers; participating in the training of field researchers and in the development of a detailed monitoring and feedback system; overseeing the formal and informal reports from field researchers; and guiding plans for administration of surveys and tests in the lead communities. It will also involve coordination and integration of the work on goals that is being developed. Prof. Adam Gamoran, a leading sociologist of education at the University of Wisconsin, has agreed to direct Monitoring, Evaluation and Feedback for the CIJE.

Consultation to Communities on Evaluation

A further outcome of MEF will be the development of capacity, within CIJE, to provide consultation to an ever-expanding group of communities on the issue of evaluation design. The Professional

Advisory Committee (Prof. James Coleman, chairman, Prof. Seymour Fox, Dr. Adam Gamoran, Prof. Ellen Goldring, Mr. Alan Hoffmann, Mrs. Annette Hochstein, and Prof. Mike Inbar) will supervise the building of that capacity.

B. THE GOALS PROJECT

The Goals Project is an effort to create what might be called "vision-drivenness" in Jewish educational institutions. To refer to an educational institution as vision-driven is to say that its work is guided and energized by a substantive vision of what it wants to achieve, of the kinds of human beings it is trying to cultivate. To speak of a Jewish educational institution as vision-driven is to say of it that it is animated by a vision or conception of meaningful Jewish continuity. The Goals Project will encourage vision-drivenness by educating relevant individuals, groups, and institutions concerning the importance of vision-drivenness. It will develop strategies designed to facilitate and encourage both serious reflection on underlying visions and equally serious efforts to identify and actualize the educational implications of the answers arrived at through such reflection.

The Goals Project takes it as a given that a necessary condition of success in Jewish education is the development of a clear and coherent vision of what it is that one hopes to accomplish. "What it is that one hopes to accomplish" can be interpreted in more than one way. It could, for example, refer to the kind of educational environment, peopled by what kinds of educators, featuring what kinds of activities, attaining what standards that one would like to bring into being.

The Goals Project is concerned with three major levels: educating institutions, Jewish communities, and the denominations. It is interested not only in working with each of these levels independently but also in encouraging them to support one another's efforts to articulate and actualize their educational visions. While the Goals Project has a special interest in the three Lead communities, its work is not necessarily limited to them.

The resources of the Mandel Institute-Harvard University Program of Scholarly Collaboration and its Educated Jew Project on alternative conceptions of the educated Jew will be made available by the CIJE to those working on the goals aspects of the monitoring-evaluation-feedback project in the lead communities.

The faculty and staff of the religious denominations have been recruited to assist in this project. Prof. Daniel Pekarsky, a

scholar in the field of philosophy of education at the University of Wisconsin, will coordinate this effort at developing and establishing goals.

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

A. Strategies for working with Lead Community lay and professional leadership:

1. A planning seminar (planned for this summer in Jerusalem):

This seminar would be designed to engage lay and professional leadership, especially within Lead Communities, around the theme of Visions and Educational Practice. The seminar, as now conceptualized, would include the following kinds of elements:

- a. Opportunities for participants to come to appreciate the important role that vision and goals can play in guiding the educational process;
- b. A chance to begin or continue working through their own visions of a meaningful Jewish existence;
- c. A chance to encounter other such views, including but not limited to formulations developed in the "Educated Jew" project;
- d. A chance to develop a strategy for engaging educational institutions in their local communities in the goal-setting process.

2. Consultations to a community's leadership around efforts already underway or accomplished that are concerned with goals;

For example, in a community like Milwaukee that recently went through strategic planning experience that put

"visioning" at the center, CIJE could initiate a serious conversation designed to unearth and develop the substantive ideal, the educational vision, that underlie the proposals that emerged from the Strategic Planning process.

3. As specific projects of lead communities emerge, their goals will be subjected to careful development and scrutiny. This will create the baseline for evaluating future success.
- B. At the denominational level, we need to find ways of encouraging the national training institutions to develop a pro-active approach to the problem of goals for Jewish education, an approach that includes efforts to catalyze serious attention to vision and goals on the part of constituent educational institutions. Possible approaches:
1. Encourage the denominations to clarify and more adequately articulate their own guiding visions of a meaningful Jewish existence.
 2. Encourage national denominational institutions to work intensively with one or more carefully selected educational institutions on issues relating to the identification of a vision and its educational implications. Such institutions might, but need not be, located in the three principal lead communities.
- C. Pilot Projects

One way to approach the Goals Project, a way which overlaps but is not identical with the approaches discussed above, is to undertake one or more pilot projects. For example, a pilot project might take a particular dimension of Jewish education, e.g., the teaching of Bible or the Israel Experience, and systematically explore it in relation to issues of underlying vision and goals. This could be done in a variety of ways and at a variety of levels. For example, a community might take it on itself to focus on a particular dimension of Jewish education -- say, the Israel Experience -- and to catalyze serious reflection on the part of all local institutions (across denominations) concerning the foundational and derivative aims of such an experience and the way such aims operate to guide practice. Conceivably, different communities would take different dimensions of Jewish education as their central focus.

D. A Coalition of Vision-Driven Institutions

This proposal is that a coalition be established for educational institutions that are seriously interested in going through a process of clarifying their underlying vision and goals, as well as in articulating and working towards the actualization of the relevant educational implications. In addition to providing evidence of seriousness, participating institutions would have to meet a variety of standards in order to qualify for admission and to remain in good standing. Member institutions would be offered a variety of CIJE-resources designed to facilitate and support their efforts.



CIJE PROJECT ON MONITORING EVALUATION AND FEEDBACK IN LEAD COMMUNITIES

**Report to Jacob and Hilda Blaustein Foundation
for the period ending July 1995**

I. INTRODUCTION

At the heart of the CIJE notion of the radical improvement and ultimate reform of Jewish education in North America lies a belief that intensive involvement in a small carefully selected group of communities will create laboratories of change which will encourage other communities to emulate and improve their own efforts.

In parallel, the enterprise needs to be informed by a coherent sense of what it is which one wants to achieve. This thoughtful process of articulating **Jewish educational goals** must lay the basis for assessing achievement and instruction, appropriate pedagogy and ultimately even the kinds of curricular materials which are used.

This approach immediately raises some important questions:

How will we know whether Lead Communities have succeeded in creating better structures and processes for Jewish education?

On what basis will CIJE encourage other cities to emulate the programs developed in Lead Communities?

How will this process result in the development of evaluation tools, manuals and other support for both

intensifying and expanding Jewish educational evaluation across North America?

Like any innovation, the Lead Communities Project requires a **monitoring, evaluation, and feedback (MEF)** component to document its efforts and gauge its success. Long accepted in the world's of public policy and business, the MEF project of the CIJE, funded in large part by the Blaustein Foundation, is the first comprehensive project in North American Jewish education which seeks both to document and evaluate this work from its earliest stages, while providing both local communities and the CIJE with on-line information about developments.

By **monitoring** we mean observing and documenting the planning and implementation of changes.

Evaluation entails interpreting information in a way that strengthens and assists each community's efforts to improve Jewish education.

Feedback consists of oral and written responses to community members and to the CIJE.

This progress report describes the activities of the project from its inception in 1992 through June 1995, and the products it has yielded. The main activities have been: (I) Monitoring and documenting of community planning and institution-building; (II) Development, implementation, and further refinement of data-collection instruments; (III) Data analysis and preparation of reports and (IV) The emergence of the Goals Project as CIJE's initiative which responds to the basic question of what it is that we wish to achieve and (V) Developing Consultative services for Jewish communities and institutions in North America which are designed to provide the assessment tools and implements for evaluating Jewish educational efforts.

II. MONITORING AND FEEDBACK: August 1992 - December 1994

To carry out on-site monitoring, we hired three full-time field researchers, one for each community. The field researchers' mandate centered on three questions:

- (1) What is the nature and extent of the mobilization of human and financial resources to carry out the reform of Jewish education in the Lead Communities?

(2) What characterizes the professional lives of educators in the Lead Communities?

(3) What are the visions for improving Jewish education in the communities?

The first two questions address the "building blocks" of mobilization and personnel, described in A Time to Act as the essential elements for Lead Communities. The third question raises the issue of goals, to elicit community thinking and to stimulate dialogue about this crucial facet of the reform process.

Monitoring activities involved observations at virtually all project-related meetings within the Lead Communities; analysis of past and current documents related to the structure of Jewish education in the communities; and, especially, numerous interviews with federation professionals, lay leaders, rabbis, and educators in the communities. Each field researcher worked to establish a "feedback loop" within his/her own community, whereby pertinent information gathered through observations and interviews could be presented and interpreted for the central actors in the local lead community process. We provided confidential feedback in both oral and written forms, as appropriate to the occasion. An important part of our mission was to try to help community members view their activities in light of CIJE's design for Lead Communities. For example, we asked questions and provided feedback about the place of personnel development in new and ongoing programs.

We also provided confidential periodic updates to CIJE, in which we offered fresh perspectives on the process of change in Lead Communities, and on the evolving relationship between CIJE and the communities. For instance, in July 1993 we presented views from the communities on key concepts for CIJE implementation, such as Lead Community Projects, Best Practices, and mobilization. Similarly, in December 1994 we presented an overview and update on changes in personnel planning in the Lead Communities. This feedback helped CIJE staff prepare to address community needs, and to plan new approaches for working with additional communities.

The intensive monitoring and feed-back phase of the project concluded in December 1994 as each community has either taken on this function or turned to CIJE to help train local indigenous Jewish educational capacity. We are continuing to provide periodic consultation on evaluation to several communities, but we no longer have a researcher

located in each community, and we are no longer carrying out day-to-day monitoring. In Atlanta, where there was a break in the tenure of the field researcher, we are bringing our full-time researcher to the stage of the two other communities - he will complete his work in July of 1996.

Communities were strongly encouraged to replace the CIJE-funded full-time MEF field-researcher with their own local evaluation capacity. The very obvious absence of such qualified people, with significant research and evaluation backgrounds throughout North America led CIJE to a **major new initiative** - beginning to create a national **Evaluation Institute** designed to help communities identify local experienced evaluators and then train them to become the locally retained Jewish educational evaluation expert. Such an expert will be available to consult within communities on the introduction of evaluation into **all** new community Jewish educational initiatives. He/she will also ultimately supervise the ongoing evaluation of the community's educational programs. CIJE will provide support and create a network of these local evaluators so that they can lean upon one another's expertise. The new instruments developed, under CIJE's guidance, will be available to this new network. A major consultation has recently (November 1995) been held on this Evaluation Institute and we are currently in the process of identifying an outstanding educationalist who will lead this exciting new venture. Eight communities have already expressed their readiness to identify such a local expert and provide the wherewithal for his/her training by CIJE. (See Appendix 1: Proposal for Evaluation Institute and Appendix 2: CIJE/JESNA Joint Evaluation Consortium).

III. DEVELOPMENT, IMPLEMENTATION AND REFINEMENT OF DATA COLLECTION INSTRUMENT: August 1992 - April 1995

A. Interview Protocols

The MEF team developed a series of interview protocols for use with diverse participants in the communities. These were field tested and then used beginning in late fall, 1992, and over the course of the year. The interview schema for educators were further refined and used more extensively in spring, 1993.

B. Survey of Educators

We also played a central role in developing an instrument for a survey of educators in Lead Communities. The MEF team worked with members of Lead Communities, and drew on past surveys of Jewish educators used elsewhere. The survey was conducted in Milwaukee in May and June, 1993, and in Atlanta and Baltimore in the fall of 1993.

The purpose of the educator survey was to establish baseline information about the characteristics of Jewish educators in each community. The results of the survey are being used for planning in such areas as in-service training needs and recruitment priorities. The survey was administered to all teachers in the Lead Communities, with an overall response rate of 82%. A parallel form was administered to educational leaders (principals, vice-principals, directors), with a response rate of 77%. Topics covered in the survey include a profile of past work experience in Jewish and general education, future career plans, perceptions of Jewish education as a career, support and guidance provided to teachers, assessment of staff development opportunities, areas of need for staff development, benefits provided, and so on.

C. Manual for the CIJE Study of Educators

After the survey and interview results were closely scrutinized, the instruments were further refined and placed together in a **manual** which may be used by other communities for similar studies. The manual also contains instructions on how to use the instruments. This evaluation manual is a first in Jewish education and "holds the hand" of evaluators, guiding them through the entire process.

In the long term CIJE plans to establish a national data base on Jewish educators. This unique manual has been requested by many communities that are anxious to conduct their own Study of Educators with local policy directions and implications. (See *Appendix 3: Manual for the CIJE Study of Educators*).

CIJE sees this manual as the first in a series of such hand-holding evaluation publications.

IV. DATA ANALYSIS AND REPORTS: January 1993 - present

A. Reports on the Professional Lives of Jewish Educators (See Appendix 4 - a.b.c.: *The Professional Lives of Jewish Educators in Baltimore, Milwaukee, Atlanta*).

Each community received a report on the professional lives of educators, based on the interviews. These reports elaborated on elements of personnel described in A Time to Act, such as recruitment, training, rewards, career tracks, and empowerment. Examples of key findings are the extent of multiple roles played by Jewish educators (e.g., principal and teacher; teacher in two or three different schools), and the tensions inherent in these arrangements; the importance of fortuitous entry into the field of Jewish education, as opposed to pre-planned entry, and the challenges this brings to in-service training; and the diversity of resources available to professional development of Jewish educators, along with the haphazard way these resources are utilized in many institutions.

B. Analysis of Survey Data

Survey data we extensively analyzed, and a number of important patterns were uncovered. In particular, we noted that the lack of professional preparation among teachers was particularly striking alongside the minimal amount of professional growth activities in which they participate. Another striking finding was the inadequacy of benefits for teachers, even among those who work full time.

C. Reports on the Teaching Force of Jewish Schools (See Appendix 5 - a.b.c.: *The Teaching Force of Baltimore, Milwaukee, Atlanta, Jewish schools*).

On the basis of the survey and the interview findings, we prepared a report for each community on the teaching force of its Jewish schools. Key findings include weaknesses in professional background and development, in career opportunities, and in benefits. At the same time, we noted a high level of commitment among many teachers. These findings suggested that the teaching force could be improved through professional growth opportunities such as high-quality in-service.

D. Policy Brief for a National Audience (See *Appendix 6: Policy Brief: Background and Professional Training of Teachers in Jewish Schools*).

After preparing reports for the three communities, we determined that the most significant national finding was the weaknesses in teacher preparation and in-service, along with their commitment to Jewish education. We prepared a **Policy Brief** which presented these findings, and CIJE staff added a plan of action as a response to this situation.

The Policy Brief was first presented at a session of the General Assembly of the Council of Jewish Federations in November, 1994. The story was widely reported in the Jewish press, with dozens of articles appearing, reaching an audience of several hundred thousand readers, across the country.

Most important, the Policy Brief data has directly resulted in major new areas of action like:

- a) An M.A. program for Jewish educators in Milwaukee with the Cleveland College of Jewish Studies.
- b) The Cummings-funded Teacher Educator Institute for developing teacher trainers for supplementary school teachers (Trainers of Trainers).
- c) The Harvard Principal's program -- now a twice-yearly fixture of CIJE's work.

E. Research Papers

We are preparing reports that address a broad range of issues related to characteristics of teachers and educational leaders, combining data from all three communities. In addition, we have elaborated our work on the professional preparation of teachers, examining conditions that may encourage more attendance at in-service programs. The results of our study suggest that certification requirements for pre-schools and community incentives for supplementary schools and their teachers have been

effective mechanisms for elevating the quantity of in-service in which teachers engage.

F. CIJE Reports on Mobilization and Visions

Several reports on mobilization, visions, and personnel planning were prepared for CIJE staff. These reports described the changes and developments we observed as we monitored the communities over time.

V. DEVELOPING CONSULTATIVE SERVICES

The first major new thrust in building consultation capacity for Jewish educational evaluation is the envisaged **CIJE Evaluation Institute**, planned to begin in 1996.

CIJE has tried to foster an "evaluation-minded" approach to educational improvement in its Lead Communities. In this effort we have seen some success. Federation staff at least pay lip service to the need to evaluate any new programs that are under consideration. More concretely, budgets for evaluation are being included in new programs. Most important, key staff and lay leaders in all three communities recognize the value of basing decisions on substantive information; as a case in point, they are using the findings of the CIJE Study of Educators as a basis for decision-making.

Our experience in the Lead Communities has made it clear that as in other areas, community agencies lack the capacity to carry out external evaluations of programs. One theory, put forth by a CIJE board member, is that agency staff simply do not know what to do. Another theory, suggested by MEF researchers, is that agency staff avoid evaluation for the usual reasons: (1) They are too busy running programs to carry out evaluation; (2) Evaluation often brings conflict, and avoiding conflict is a high priority for agency staff. Yet a third barrier to evaluation, experienced in Cleveland, is that it is difficult to find qualified outsiders to carry out an evaluation that is knowledgeable, informative, and fair.

The CIJE Evaluation Institute will address each of these problems. It will provide knowledge and motivation for evaluation by sharing expertise with a carefully chosen set

of individuals from the communities with which CIJE is working.

Design

The Evaluation Institute should, in its full-blown version, consist of three separate but related ongoing seminars:

Seminar I: The Purpose and Possibilities of Evaluation

This seminar is intended for a federation professional and a lay leader from each community. Its purpose is to help these leaders understand the need for evaluation, as well its limits and possibilities. Participation in this seminar will provide local leadership with the "champions" for evaluation that will help ensure its role in decision-making.

Seminar II: Evaluation in the Context of Jewish Education

This seminar is intended to create an "evaluation expert" in each community. Participants should be trained in social science research at the Ph.D. level, and experienced in research on education, communities, public agencies, or related areas. The purpose of this seminar is to provide a forum for discussing specifically evaluation in Jewish education. Through this seminar, participants will become a source of expertise upon which their respective communities can draw.

There are two important reasons for including such local experts in the evaluation institute. First, and most essential, by engaging such experts in a long-term, ongoing relationship, communities can ensure continuity in their evaluation and feedback efforts, instead of one-shot projects that typically characterize evaluation when it does occur. Second, by entering into a relationship with a local expert, organized Jewish communities can exhibit their commitment to take evaluation seriously.

Seminar III: Nuts and Bolts of Evaluation in Jewish Education

This seminar is intended for the persons who will actually be carrying out the evaluation of programs in Jewish education. It will cover such topics as instruments, procedures, coding, analysis, and writing reports. Participants in the three seminars will also meet together. Evaluation research must be tailored to the political and cultural context in

which it is to be conducted and interpreted. The best way to achieve this is to bring together those who "know" the context and those who "know" about evaluation. The CIJE evaluation institute could facilitate a learning process among the federation lay and professionals and the evaluation experts in which they teach one another in a structured and supportive context.

Content

The content of these seminars will be drawn up by whoever is engaged to direct the evaluation institute. Instructors for the seminars will be drawn from a wide variety of fields, including both general and Jewish education. Within CIJE, we have substantial expertise in the study of personnel, including leadership, and we expect this to form a part of the content for the first year. However, since we expect the Lead Communities together with 8-10 other communities to participate in the seminars, the personnel study must not constitute the entire curriculum.

Staff

To create this institute, it will be necessary to hire a director, who will work perhaps 12 hours per week PLUS the time spent at the seminars themselves. The institute director will be supervised by the CIJE executive director. CIJE office staff will provide support for the director and the seminar.

VI. GOALS PROJECT

It was during the work of the North American Commission for Jewish Education that David Hirshhorn asked the question: **What does it mean to succeed in Jewish education?** This question stimulated, after the Commission, the Educated Jew Project of the Mandel Institute and the Goals Project of CIJE.

The Goals Project is designed to help Jewish educating institutions become more effective through careful attention to their guiding goals. The project's assumptions are straight-forward. First, educational effectiveness depends substantially on the extent to which the work of educating institutions is organized around goals that are clear and compelling to the key stake holders. Such goals enhance the motivation of educators;

they make possible evaluation and accountability; and they play a critical role in guiding basic decisions concerning such varied matters as personnel, in-service education, and curriculum design.

Second, many Jewish educating institutions suffer from a failure to be meaningfully organized around clear and compelling goals. Third, efforts to improve Jewish education usually deal inadequately with goals. Often, institutions by-pass serious issues relating to goals altogether; and when the stake holders in an educating institution do address the question of goals, the process is usually not one that asks them to examine Jewish sources that might illuminate their deliberations. Nor are systematic efforts typically made to organize and evaluate educational practice in the light of the goals arrived at; too often, and for reasons that need to be seriously addressed, mission-statements just gather dust!

The Goals Project of CIJE in partnership with the Mandel Institute in Jerusalem launched its work with communities through a seminar in the summer of 1994 intended for lay and professional educational leaders from a number of communities in the United States. This seminar, was designed to educate the participants concerning the important place of goals and vision in Jewish education and to encourage them to engage their local educating institutions back home in a process of becoming more thoughtful concerning their goals and the relationship between these goals and educational practice.

CIJE promised to support such local efforts by means of a series of seminars in the local communities aimed at key stake holders in their educating institutions. It was assumed that the clientele for these seminars would be generated by these communities. It was also assumed that among institutions participating in these seminars, some would decide that the goals-agenda did not meet their needs; that others would use the opportunities provided by these seminars to improve their educational efforts; and that from among the latter group of institutions a few would emerge as candidates for intensive work with CIJE beyond the period of these local seminars. These institutions might become the nucleus of a kind of coalition of institutions seriously striving to be vision-driven.

Recent and current activities

The Jerusalem Seminar has stimulated a variety of goals-related efforts over the last several months. For example, in Cleveland, a seminar organized around the theme of goals and led by Professor Walter Ackerman has become a vehicle for bringing together

key lay and professional leaders in Jewish education from across the community for regular meetings. In addition, Rabbi Robert Toren of the Jewish Education Center of Cleveland has been hard at work with his Drisha Project, which is designed to engage local educating communities (schools and congregations) in a serious self-improvement process in which issues pertaining to goals play a very prominent role. CIJE has been consulting to Rabbi Toren in this process, and he has suggested CIJE-involvement in working with the institutions that participate in this local project. Also in Cleveland, CIJE has been in conversation with the Agnon School concerning collaborative work around a goals-agenda. In Milwaukee, a four-session seminar on goals began in February for a constituency that includes over 35 people representing 4 Day Schools, the JCC, and two congregations.

Alongside these efforts, CIJE collaborated with lay and professional leaders in Atlanta around the development of an all-day seminar on goals in February for some sixty key stake holders in a new Community High School. There have also been conversations concerning Goals Project involvement with a number of JCC camps and possibly with one or more congregations that seem particularly interesting.

In Baltimore a one-day Goals Retreat for the leadership of the Central Agency for Jewish Education is planned for Fall 1995 (November).

Projected activities

In 1996, the Goals Project is scheduled to begin working with a limited number of select institutions interested in undertaking a systematic effort to develop and organize practice around a set of clear and compelling goals. Such collaborations will benefit these institutions and will contribute significantly to our own knowledge-base. But our success in such partnerships will depend heavily on our ability to build capacity in two major areas.

First, the success of our work with individual institutions on a goals-agenda will depend on our ability to expand our base of knowledge and know-how. Of special importance is finding ways to engage the stake holders in these institutions in wrestling with issues of Jewish content in the face of their tendency to rush impatiently towards a consensus based on the beliefs they bring to the table.

Second, since CIJE's core-staff will not itself be able to work with individual institutions around the country in any sustained way, we need to recruit and cultivate a national cadre of resource-people or coaches to work with these institutions. Since the pool of people with the requisite background and talent is small, and they are the kind of people whose energies are typically already fully engaged, this is a difficult challenge.

Our work in spring 1995 and summer 1995 has been organized around this "building capacity" agenda. Upcoming activities will include at least one substantial workshop designed to bring on-board potential resource-people for our project and to further our own learning concerning ways of working with institutions on a serious goals-agenda.



VIII. LIST OF AVAILABLE PRODUCTS

The following products have been distributed nationally or locally:

National Distribution

1. Gamoran, Adam, Ellen B. Goldring, Roberta L. Goodman, Bill Robinson, and Julie Tammivaara. (1994). Policy Brief: Background and Training of Teachers in Jewish Schools. Presented at the General Assembly of the Council of Jewish Federations, Denver.
2. Gamoran, Adam, Ellen B. Goldring, Roberta L. Goodman, Bill Robinson, and Julie Tammivaara. (1995). Manual for the CIJE Study of Educators.
3. Gamoran, Adam, Ellen B. Goldring, Roberta L. Goodman, Bill Robinson, and Julie Tammivaara. (1995). Background and Training of Teachers in Jewish Schools: Current Status and Levers for Change. Presented at the annual conference of the Network for Research in Jewish Education, Stanford, CA.
4. Goldring, Ellen B., Adam Gamoran, and Bill Robinson. (Under review). Educational Leaders in Jewish Schools: A Study of Three Communities.
5. Gamoran, Adam, Ellen B. Goldring, and Bill Robinson. (In preparation). Teachers in Jewish Schools: A Study of Three Communities.

Local Distribution

6. Goodman, Roberta L. (1993). The Professional Lives of Jewish Educators in Milwaukee.
7. Rottenberg, Claire. (1993). The Professional Life of the Jewish Educator: Atlanta.
8. Tammivaara, Julie (1994). Professional Lives of Jewish Educators in Baltimore.
9. Gamoran, Adam, Ellen B. Goldring, and Roberta L. Goodman. (1994) The Teaching Force of Milwaukee's Jewish Schools.

10. Gamoran, Adam, Ellen B. Goldring, and Julie Tammivaara. (1994) The Teaching Force of Baltimore's Jewish Schools.

11. Gamoran, Adam, Ellen B. Goldring, and Bill Robinson. (1994). The Teaching Force of Atlanta's Jewish Schools.

(Note: Several reports on community mobilization were also prepared for CIJE internal use. In one case, an evaluation report on a local project was prepared for a community.)



A:BLAUSTE:WPD

From: EUNICE::"74104.3335@compuserve.com" 21-JUL-1995 14:11:35.44
To: "INTERNET:GAMORAN@ssc.wisc.edu" <GAMORAN>
CC: Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>,
myself <74104.3335@compuserve.com>
Subj: revised work plan -- please comment

Adam,

A couple of comments on the revised work plan.

First, perhaps you should mention that my work as a field researcher (monitoring, etc.) in Atlanta continued until the end of June? Also, should you mention that I will continue to provide consultations to Atlanta (this is the word used in the 1995 workplan)? And, should you also mention your consultations to Cleveland? Seattle?

Second, two specific comments:

- In section II.A., are we using two different terms for the module/manual? The current agreed upon term is Manual for The CIJE Study of Educators.
- In section II.A.1., the code book (referred to often as the "software package") is omitted from the list of components of the Manual.

Bill

Outline of MEF and Related CIJE Work, 1995
Revised July 24, 1995

Background: The original task of the our project was to undertake monitoring, evaluation, and feedback (MEF) in CIJE's Lead Communities. We carried out this work from August 1992 through December 1994, with a staff of three full-time field researchers working with the two part-time (3 days/month) project directors. With the reorganization of CIJE into four domains, one of which is Research and Evaluation, our assignment has shifted, and now consists of three major areas: Building a Research Capacity, Building an Evaluation Capacity, and Evaluating CIJE Initiatives. We now employ one full-time staff researcher along with the two project directors.

This document provides an update of our 1995 Work Plan, based on the earlier revision of March 8, 1995. The end of the document contains a list of products with notes on their current state of completion as of July 24, 1995.

I. Building a Research Capacity in North America

A. Conducting high-quality research

1. Writing the full integrated report on teachers in the lead communities
2. Writing reports on educational leaders in the Lead Communities (in each Lead Community, and combined)
3. Possibly additional policy briefs -- to be decided -- possible topics: leaders, teacher/leader comparisons, early childhood
4. Research papers on teacher power, teacher in-service, and levers for change in extent of in-service

II. Building an Evaluation Capacity in North America

A. The CIJE Manual for the Study of Educators

1. Produce via desk-top publishing a module for studying Jewish educators in a community
 - a. Survey instrument
 - b. Interview protocol
 - c. Instructions for both
 - d. List of anchor items to be used in a national data base
 - e. Codebook for entering and coding data using SPSS (commercially available statistical software)

B. Dissemination of the module

1. The preferred design also addresses the broader need for creating a capacity for evaluation in North American communities: A three-tiered seminar on evaluation
2. Prepare a proposal for an Evaluation Institute organized by CIJE
3. If the Evaluation Institute is approved and a staff person is hired to coordinate it, work with the staff person to plan and develop curriculum

III. Evaluating CIJE Initiatives

A. Evaluation of Teacher-Educator Institute (Cummings project)

1. Prepare a proposal for evaluation of the Teacher-Educator Institute
2. Implement the evaluation if the proposal is approved

IV. Planning for the Future

A. Informal education -- MEF staff will work on conceptualization for policy research on informal education

1. Consult with CIJE staff
2. Consult with other experts on informal education

B. Community consultations -- currently we are providing ongoing advice to Atlanta and Cleveland

C. Possible seminar on CIJE: What have we learned from three years of MEF?

- about mobilizing communities
- about creating and working as a change agent
- about conducting MEF in communities
- The purpose of the seminar would be to take a step back and assess where we have been and what we have learned over the last three years. It is intended for staff and close advisors. One product of the seminar would be a summary document about what we have learned, for our internal use and for orienting new advisory committee members. A research paper might also result from the seminar, but we are not sure about that.
- Running this seminar would take a substantial investment of planning time from MEF staff

V. Products

A. Research Capacity

1. Research paper: "Teachers in Jewish Schools" (analysis of survey data from three communities): IN PROGRESS, DRAFT EXPECTED AUGUST 31
2. Policy Brief -- TO BE DECIDED
3. Reports on the characteristics of educational leaders
 - a. 3-city report: DRAFT COMPLETED, COMMENTS RECEIVED, REVISION IN PROGRESS, FINAL VERSION EXPECTED AUGUST 15
 - b. one for each community: DRAFT OF FIRST COMMUNITY EXPECTED AUGUST 15
4. Research papers
 - a. Levers for increasing professional growth activities: DRAFT COMPLETED AND PRESENTED AT RESEARCH CONFERENCE, COMMENTS RECEIVED, REVISION IN PROGRESS, FINAL VERSION EXPECTED OCTOBER 31
 - b. Teacher power: IN PROGRESS, DRAFT EXPECTED AUGUST 31
 - c. Quality of inservice experiences: IN PROGRESS, DRAFT EXPECTED SEPTEMBER 30

B. Evaluation Capacity

1. Module for Studying Educators in a Jewish Community: COMPLETED
2. Proposal for Evaluation Institute: COMPLETED

C. Evaluation of CIJE Initiatives

1. Proposal for evaluation of Teacher-Educator Institute: COMPLETED
2. (Assuming proposal is approved) Memo on aims and selection procedures in Teacher-Educator Institute: AUGUST
3. (Assuming proposal is approved) Interview protocol for participants in Teacher-Educator Institute (and other community members): AUGUST
4. (Assuming proposal is approved) Report on the current state of professional growth opportunities for teachers in selected communities: SEPTEMBER - DECEMBER

D. CONTENT AND PROGRAM

The resources of both the **Best Practices** and **Goals** Projects will, in 1995, be primarily redirected to the CIJE efforts in Building the Profession and Community Mobilization. Thus:

Best Practices will:

- be designed around those best practices of in-service education with the preparation of shorter occasional papers on these practices
- be developed on the Jewish Community Center (in cooperation with JCCA) emphasizing the personnel aspects of these outstanding practices
- create one-day short consultations on aspects of in-service training as these emerge in the community personnel action plans
- make presentations to lay leaders as part of CIJE Community Mobilization efforts
- create two seminars for educators on Best Practices in local communities.

The Goals Project

• The Goals Project will, following the July 1994 seminar in Israel, engage with several "prototype-institutions" in order to show how increased awareness, attention and seriousness about goals has to be tied to investment in educators. This will also serve as a limited laboratory for CIJE to learn about how to develop a goals process. Seminars will take place in Milwaukee, Cleveland and Baltimore and in Atlanta CIJE will engage with a group of lay leaders planning to create a new community high school. An intensive goals project will not commence anywhere until additional capacity has been developed through training "coaches".

• CIJE will concentrate on developing "coaches"/resource people for 9 communities in order to seed Goals Projects in select communities. This will involve identifying and cultivating a cadre of resource-people to work in this project. This should take the highest priority of our work in the Goals Project.

* * *

D. CONTENT AND PROGRAM

The resources of both the **Best Practices** and **Goals** Projects will, in 1995, be primarily redirected to the CIJE efforts in Building the Profession and Community Mobilization. Thus:

Best Practices will:

- be designed around those best practices of in-service education with the preparation of shorter occasional papers on these practices. *During the fall of 1995, we will convene a meeting of experts in the area of professional development (inservice education) in Jewish education to develop criteria and choose sites to write up for the planned volume. The volume itself will appear in 1996.*
- be developed on the Jewish Community Center (in cooperation with JCCA) emphasizing the personnel aspects of these outstanding practices. *As planned this volume will be published in the late fall- early winter (1996).*
- create one-day short consultations on aspects of in-service training as these emerge in the community personnel action plans. *Certain aspects of this item have been included in our work on the Teacher Educator Institute (in the Building the Profession domain.)*
- make presentations to lay leaders as part of CIJE Community Mobilization efforts. *This has taken place to some extent at the 1995 CAJE conference. However, a comprehensive plan for implementing these presentations needs to be developed during 1995.*
- create two seminars for educators on Best Practices in local communities. *Some aspects of this item may be included in the TEI program. We have also done this at national conferences (instead of local communities) which are attended by local educators (e.g. JEA, CAJE).*

The Goals Project

• The Goals Project will, following the July 1994 seminar in Israel, engage with several "prototype-institutions" in order to show how increased awareness, attention and seriousness about goals has to be tied to investment in educators. This will also serve as a limited laboratory for CIJE to learn about how to develop a goals process. Seminars will take place in Milwaukee, Cleveland and Baltimore and in Atlanta CIJE will engage with a group of lay leaders planning to create a new community high school. *The items above have taken place in Milwaukee, Cleveland and Atlanta. A seminar is planned for Baltimore in October. In addition two items have been added: a consultation on goals in JCC camps planned for November in Washington DC (via the JCCA) and CIJE's ongoing consulting to the Wexner Heritage Foundation which will culminate in a retreat for Wexner alumni in December.*

V. Products

A. Research Capacity

1. Research paper: "Teachers in Jewish Schools" (analysis of survey data from three communities); DRAFT EXPECTED NOVEMBER 15
2. Policy Brief -- TO BE DECIDED
3. Reports on the characteristics of educational leaders
 - a. 3-city report: COMPLETED (PENDING MINOR EDITORIAL REVISIONS)
 - b. one for each community: ATLANTA REPORT COMPLETED; MILWAUKEE AND BALTIMORE REPORTS TO BE COMPLETED BY SEPT. 23
4. Research papers
 - a. Levers for increasing professional growth activities: DRAFT COMPLETED AND PRESENTED AT RESEARCH CONFERENCE, COMMENTS RECEIVED, REVISION IN PROGRESS, FINAL VERSION EXPECTED OCTOBER 31
 - b. Teacher power: IN PROGRESS, DRAFT WAS EXPECTED AUGUST 31, SHOULD ARRIVE ANY DAY
 - c. Quality of inservice experiences: IN PROGRESS, DRAFT EXPECTED SEPTEMBER 30

B. Evaluation Capacity

1. Manual for Studying Educators in a Jewish Community: COMPLETED (PENDING MINOR EDITORIAL AND FORMATTING CHANGES)
2. Proposal for Evaluation Institute: COMPLETED

C. Evaluation of CUE Initiatives

1. Proposal for evaluation of Teacher-Educator Institute: COMPLETED
2. Memo on aims and selection procedures in Teacher-Educator Institute: OCTOBER
3. Interview protocol for participants in Teacher-Educator Institute (and other community members): NOVEMBER
4. Report on the current state of professional growth opportunities for teachers in selected communities: DECEMBER



III. Evaluating CIJE Initiatives

A. Evaluation of Teacher-Educator Institute (Cummings project)

1. Prepare a proposal for evaluation of the Teacher-Educator Institute
2. Implement the evaluation if the proposal is approved

IV. Planning for the Future

A. Informal education -- conceptualization

1. Consult with CIJE staff
2. Consult with other experts on informal education

B. Community consultations -- currently we are providing ongoing advice to Atlanta and Cleveland

C. Preparation for possible seminar on CIJE: What have we learned from three years of MEF?



Outline of MEF and Related CIJE Work, 1995
Revised July 24, 1995

C. MONITORING, EVALUATION AND FEEDBACK

The workplan for monitoring, evaluation and feedback has been developed in consultation with the advisory committee and reflects the completion of some work in progress and some new directions for this project.

The main areas of work for 1995 that are proposed are:

1. Analysis and Dissemination of Community Data on Educators and Survey Methods

This includes:

- Further analysis of Educators' Survey data in the CIJE laboratory communities including further Policy Briefs on: Salaries and Benefits; Career Plans and Opportunities and Teacher Preferences for Professional Development; Educational Leaders
- Full Integrated Report across all three communities
- Development of a "module" for studying educators in additional communities which involves refining the survey instruments and interview protocols and making them available to other communities by writing descriptions of the procedures.

2. Monitoring and Evaluation of CIJE-initiated Projects

In CIJE selected communities, MEF will:

- Guide communities to monitor and evaluate Personnel Action Plans
- Monitor and evaluate Goals Project activities
- Analysis of changing structures of Jewish education in North America (Ackerman)

3. Conceptualizing a Method for Studying Informal Education and Educators

A process of consultation with experts and thinking to result in a design by the end of 1995 for implementation in 1996

4. Leading Educational Indicators

In place of monitoring day-to-day process in the Lead Communities, the MEF Advisory Committee has suggested the development of Leading Educational Indicators to monitor change in North American communities.

- In 1995 to hold by June the first discussion with consultants on establishing some "Leading Indicators" and to begin gathering data on those indicators in the second half of the year.

5. Towards a Research Capacity

In the second half of 1995 develop a plan for creating a research agenda for North America.

This document provides an update of our 1995 Work Plan, based on the earlier revision of March 8, 1995. The end of the document contains a list of products with notes on their current state of completion as of July 24, 1995.

I. Building a Research Capacity in North America

A. Conducting high-quality research

1. Writing the full integrated report on teachers in the lead communities
2. Writing reports on educational leaders in the Lead Communities (in each Lead Community, and combined)
3. Possibly additional policy briefs -- to be decided
4. Research papers on teacher power, teacher in-service, and levers for change in extent of in-service

II. Building an Evaluation Capacity in North America

A. The CIJE Manual for the Study of Educators

1. Produce via desk-top publishing a module for studying Jewish educators in a community
 - a. Survey instrument
 - b. Interview protocol
 - c. Instructions for both
 - d. List of anchor items to be used in a national data base
 - e. Codebook for entering and coding data using SPSS (commercially available statistical software)

B. Dissemination of the module

1. Prepare a proposal for an Evaluation Institute organized by CIJE
2. If the Evaluation Institute is approved and a staff person is hired to coordinate it, work with the staff person to plan and develop curriculum

ADH

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ADH - agenda

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- idea of LC
- process of ch
in

② Eval Instit

DH
need more specif design of EI
- incl local elements - w/ budget

③ TEI eval (+ other eval?)

④ study/anal/interp of early childhood

University of Wisconsin—Madison

MADISON, WISCONSIN 53706

DEPARTMENT OF SOCIOLOGY
SOCIAL SCIENCE BUILDING
1180 OBSERVATORY DRIVE

TO CALL WRITER DIRECT

PHONE (608) 263-4253

MEMORANDUM

June 14, 1996

To: Karen Barth

From: Adam Gamoran

Re: Background materials on the Monitoring, Evaluation, and Feedback (MEF) project

I was pleased to learn that you have agreed to assume the leadership of CIJE. Alan has asked me to provide you with background materials on the CIJE's Monitoring, Evaluation, and Feedback project, which I have directed with Ellen Goldring since 1992. You will have received from Josie a mountain of the various documents we've produced, and in addition I am sending a series of (more or less) annual work plans and progress reports. These should give you a good sense of the evolution of our project, from its earliest conception as the evaluators of lead communities, to the current view of the project as encompassing research and evaluation in Jewish education, one of the four domains of CIJE.

Please let me know if I can answer any questions. Ellen and I would very much like to meet with you after the summer to provide a "briefing" on CIJE from the perspective of our project.

I look forward to meeting you.

**CONFIDENTIAL DRAFT -- NOT YET SUBMITTED TO BLAUSTEIN FOUNDATION
-- UNDER CONSIDERATION BY ADH --**

**Research and Evaluation at the
Council for Initiatives in Jewish Education:
A Proposal to the Blaustein Foundation
August 1, 1996 - July 31, 1999**

Through the generous support of the Blaustein Foundation, the Council for Initiatives in Jewish Education (CIJE) has carried out three years of monitoring, evaluation, and feedback. We propose to follow up that work with a rich agenda for research, evaluation, and capacity-building over the next three years. Our plans build on the findings and lessons we have learned during our first three years. They move strongly in the direction of enhancing the capacity for evaluation of Jewish education within local communities. CIJE will serve as a catalyst for change by creating a new context and curriculum for teaching the skills and knowledge of evaluation in Jewish education, and by promoting a culture in which learning from evaluation is valued.

The Impact of Monitoring, Feedback, and Evaluation, 1993-1996

From the outset, the CIJE monitoring, evaluation, and feedback (MEF) project addressed three main questions: (1) What is the nature and extent of mobilization of human and financial resources to reform Jewish education in the CIJE Lead Communities (Atlanta, Baltimore, and Milwaukee)? (2) What characterizes the professional lives of educators in the Lead Communities? (3) What are the visions or goals for improving Jewish education in the communities? Community-based field researchers provided

information in response to these questions, gathering data from observation, interviews, and questionnaires. A series of reports based on these data has galvanized support for changes in Jewish education and has led to important new initiatives in the participating communities and nationally. Reports through July 1995 were described in our last progress report; new reports include the fully integrated report on teachers in Jewish schools of all three communities, and a study of educational leaders in the three communities which was recently presented at the annual meeting of the American Educational Research Association. All eighteen products are listed in the Appendix.

Initiatives in Building the Profession

Many ongoing efforts of CIJE and its collaborating communities are responses to our research and evaluation. Our reports juxtaposed the stability and commitment of Jewish educators alongside their lack of preparation and weak professional growth. Examples of local initiatives that are responding to these findings include a distance education collaborative between the Milwaukee Jewish community and the Cleveland College of Jewish Studies, and upgraded benefits packages for full-time Jewish educators in Baltimore. Examples of national initiatives include the Harvard-CIJE Leadership Seminars and the CIJE Teacher-Educator Institute. Local and national initiatives are working in concert to create systemic reform in Jewish communities, because the Lead Communities are major participants in the CIJE national programs. For example,

Atlanta has sent a large group of principals to the Leadership Seminars, and its central agency staff along with a supplementary school director are enrolled in the Teacher-Educator Institute. As a result, new ideas for professional development of educators are blossoming in Atlanta, and our ongoing evaluation will document the changes that are occurring.

Resources for Evaluation

Our data-gathering efforts required us to develop new instruments, which have now been revised and compiled in a Manual for the CIJE Study of Educators. The main components of this manual are a questionnaire for educators, and interview protocols for teachers and educational leaders. In addition, coding instructions have been developed to accompany the questionnaire. The manual is available for use in other communities, and Seattle, Cleveland, and Chicago have already carried out studies of their educators using our instruments. Several other communities are currently contemplating studies based on our Manual for the CIJE Study of Educators. Ultimately, data collected in these communities will become part of a North American data base on Jewish education, a valuable resource for future policy research.

Experiences in working with Lead Communities taught us lessons that have shaped our current work and our plans for the future. Most important, we learned that a significant barrier to evaluation within local communities is the lack of capacity to carry out the work. Even where funds are available, knowledge of

how to evaluate programs and the will to initiative program evaluation are in short supply. Just as our Manual for the CIJE Study of Educators is stimulating scrutiny of personnel, the CIJE Manual for Program Evaluation in Jewish Education, currently under development, will provide guidance for program evaluation.

Building for the Future of Research and Evaluation in Jewish Education

Our experience shows that for the Manual for Evaluation to have a real impact, it will be necessary to create a context in which procedures described can be used by trained professionals who have insight into the workings of American Jewish life, and whose work is supported by knowledgeable lay people. We need to develop not only knowledge and skills, but appreciation among our lay people and educators that evaluation can be a force for positive change. To meet these goals, CIJE is proposing to establish an Evaluation Institute as the centerpiece of our new initiatives in the area of evaluation. In the long run, the Evaluation Institute will lay the groundwork for a National Center for Research and Evaluation in Jewish Education.

We are proposing work in two areas: the Evaluation Institute, and ongoing monitoring of CIJE projects.

Evaluation Institute

A guiding principle of CIJE has been that initiatives in Jewish education need to be accompanied by evaluation. In this context, evaluation has three basic purposes: (1) to assist efforts to implement ongoing programs more effectively; (2) to determine, after an appropriate period of time, whether a program

is sufficiently successful to warrant further effort and resources; and (3) to provide knowledge about what works and how, so that successful programs can be replicated in new places.

CIJE has tried to foster an "evaluation-minded" approach to educational improvement in its Lead Communities. In this effort we have seen some success. Federation staff at least pay lip service to the need to evaluate any new programs that are under consideration. More concretely, budgets for evaluation are being included in new programs. Most important, key staff and lay leaders in all three communities recognize the value of basing decisions on substantive information; as a case in point, they are using the findings of the CIJE Study of Educators as a basis for decision-making.

Our experience in the Lead Communities has made it clear that as in other areas, community agencies lack the capacity to carry out external evaluations of programs. One theory, put forth by a CIJE board member, is that agency staff simply do not know what to do. Another theory, suggested by MEF researchers, is that agency staff avoid evaluation for the usual reasons: (1) They are too busy running programs to carry out evaluation; (2) Evaluation often brings conflict, and avoiding conflict is a high priority for agency staff. Yet a third barrier to evaluation, experienced in Cleveland, is that it is difficult to find qualified personnel to carry out an evaluation that is knowledgeable, informative, and fair.

The proposed CIJE Evaluation Institute would address each of

these problems. It would provide knowledge and motivation for evaluation by sharing expertise with a carefully chosen set of individuals from the communities with which CIJE is working.

Design. The Evaluation Institute would consist of three separate but related ongoing seminars:

Seminar I: The Purpose and Possibilities of Evaluation

This seminar is intended for a federation professional and a lay leader from each community. Its purpose is to help these leaders understand the need for evaluation, as well its limits and possibilities. Participation in this seminar will provide local leadership with the "champions" for evaluation that will help ensure its role in decision-making.

Seminar II: Evaluation in the Context of Jewish Education

This seminar is intended to create an "evaluation expert" in each community. Participants should be trained in social science research at the Ph.D. level, and experienced in research on education, communities, public agencies, or related areas. The purpose of this seminar is to provide a forum for discussing specifically evaluation in Jewish education. Through this seminar, participants will become a source of expertise upon which their respective communities can draw.

There are two important reasons for including such local experts in the evaluation institute. First, and most essential, by engaging such experts in a long-term, ongoing relationship, communities can ensure continuity in their evaluation and feedback efforts, instead of one-shot projects that typically characterize evaluation when it does occur. Second, by entering into a relationship with a local expert, organized Jewish communities can exhibit their commitment to take evaluation seriously.

Seminar III: Nuts and Bolts of Evaluation in Jewish Education

This seminar is intended for the persons who will actually be carrying out the evaluation of programs in Jewish education. It will cover such topics as instruments, procedures, coding, analysis, and writing reports.

Participants in the three seminars would also meet together.

Evaluation research must be tailored to the political and

cultural context in which it is to be conducted and interpreted. The best way to achieve this is to bring together those who "know" the context and those who "know" about evaluation. The CIJE Evaluation Institute could facilitate a learning process among the federation lay and professionals and the evaluation experts in which they teach one another in a structured and supportive context.

Content. Each of the three seminars will have somewhat different content, but overall the seminars will draw on three bodies of knowledge: (a) The field of evaluation, its diverse methodologies and aims, challenges and possibilities; (b) understanding of Jewish communities in North America; and (c) materials developed by CIJE out of our experiences in Lead Communities, especially the Manual for the CIJE Study of Educators and the CIJE Manual for Program Evaluation in Jewish Education.

Staff. The Evaluation Institute will be directed by a national leader in the field of evaluation. The faculty will be broad-based, including experts on Jewish community, evaluation methodologies, and Jewish educational researchers.

Ongoing Monitoring of CIJE Projects:
The Teacher-Educator Institute

While the Evaluation Institute builds capacity for program evaluation in local communities, it is important to assess ongoing CIJE projects. A major focus of effort in this area will be a three-year evaluation of the Teacher-Educator Institute,

which is already underway. As explained in A Time to Act, short-term and long-term evaluations are necessary so that effective programs can be documented and knowledge about them disseminated throughout North America. The CIJE Teacher-Educator Institute is a major new initiative in the area of building the profession, and its evaluation is a major focus of work in the area of research and evaluation.

The CIJE Teacher-Educator Institute (TEI) is a three-year project to create a cadre of outstanding teacher-trainers for supplementary Jewish education. The project brings together teams of educational leaders from communities across North America, including school directors and central agency personnel. These outstanding leaders will form a network of teacher-educators who share a vision of teaching and learning, and who support one another in developing new models of professional development. Ultimately, participants in TEI will stimulate enhanced professional development for the educators of their schools and communities.

Evaluation of TEI will focus on a wide range of outcomes for communities and schools. At the communal level, we will examine changes in the extent and quality of opportunities for professional development. Within two communities, we will carry out intensive case studies of changes in the contexts, activities, and beliefs about professional development. In schools, we will evaluate opportunities for teachers' professional development compared to the standards articulated by

TEI. For individual TEI participants, we will study how their understanding of professional development has changed as a result of their participation in TEI. These outcomes will be assessed with surveys, interviews, and observations.

Study of Professional Development Programs. To assess changes in programs, we will compare programs that currently exist to programs established in response to TEI. Data from the CIJE Lead Communities documented two major limitations of professional development programs for Jewish educators: (1) They are infrequent, averaging less than one-sixth of the amount of professional development that is standard among public-school educators in some states; and (2) their quality is inadequate to meet the challenges of Jewish education, in that they are fragmented, isolated, and not part of a coherent program of professional growth. In contrast, TEI intends to foster new understandings of professional development among key teacher-educators, and thus bring about changes in the extent and quality of professional development in participating communities. Programs consistent with TEI's approach will focus on targeted populations, empower participants to learn from their own practice, establish bridges to classrooms, and strengthen relations within and among institutions.

To assess baseline conditions (i.e., the status of professional development when TEI began), we recently distributed a Professional Development Program Survey to central agency staff

and supplementary school principals in participating communities. Combining this new data with information previously gathered from the Lead Communities will yield a rich portrait of professional development programs early in the TEI process. The surveys will be re-administered two years hence to monitor changes in the extent and nature of professional development programs in five targeted communities.

In addition to the surveys, we plan to interview TEI participants from five selected communities to monitor changes in their thinking and practices of professional development. This analysis will uncover the mechanisms through which changes in professional development opportunities occur. The interviews will reveal how TEI participants understand their roles as teacher-educators, how those roles may change, and how participants are working to create more meaningful and empowering professional growth for educators in their schools and communities.

Intensive Case Studies. The potential success of TEI lies not only in its expected impact on programs for professional development (e.g., workshops, seminars) , but on the elaboration of the multiple ways in which professional growth may occur. For example, informal interactions between principals and teachers can be an important source of professional growth. In addition, TEI participants and those affected by TEI participants in local communities may become more adept at learning from their professional practices. To examine these changes, we need more

in-depth analyses than will be possible using our surveys and interviews with TEI participants. Consequently, we will carry out case studies in two selected communities of changes in the extent and quality of professional growth, not limited to formal programs. The two communities chosen are those in which TEI participants include both central agency staff and supplementary school directors, working in teams. These partnerships offer the necessary support through which positive changes are most likely to occur.

The case studies will draw on interviews with TEI participants, other supplementary school directors, and supplementary teachers. We will also carry out observations in selected schools to identify changes in professional development that occur in concert with TEI.

Data collection is set to begin this spring and will continue for another two years. Reports from this evaluation effort will (1) provide feedback to TEI planners and leaders about the effectiveness of the program and (2) provide information to local and national Jewish audiences who may want to implement similar programs.

**Towards a National Center for
Research and Evaluation in Jewish Education**

A goal of the CIJE, first articulated in *A Time to Act*, is the building of a capability for research and evaluation of Jewish education in North America. With the generous support of the Blaustein Foundation, CIJE has taken important first steps in that direction. If further support allows us to establish the

program described in this proposal, we will be ready by 1999 to move onto a new level of capacity: Building a real infrastructure for high-quality research and evaluation in Jewish education. A cadre of community evaluators will be working; CIJE's national research and monitoring will be well established; a national database on the personnel of Jewish communities will be available and growing; and increasing quality and quantity of research and evaluation on Jewish education will be underway. By that time, knowledge and manpower for a fully functioning national center will be available, and CIJE's next task will be to serve as the catalyst for establishing such a center. This is our vision.



Appendix: List of Available Products

National Distribution

1. Gamoran, Adam, Ellen B. Goldring, Roberta L. Goodman, Bill Robinson, and Julie Tammivaara. (1994). Policy Brief: Background and Training of Teachers in Jewish Schools. Presented at the General Assembly of the Council of Jewish Federations, Denver.
2. Gamoran, Adam, Ellen B. Goldring, Bill Robinson, Roberta L. Goodman, and Julie Tammivaara. (1995). Background and Training of Teachers in Jewish Schools: Current Status and Levers for Change. Presented at the annual conference of the Network for Research in Jewish Education, Stanford, CA. Currently under journal review. *Accepted for publication in Religious Education.*
3. Goldring, Ellen B., Adam Gamoran, and Bill Robinson. (1995). Educational Leaders in Jewish Schools: A Study of Three Communities.
4. Gamoran, Adam, Ellen B. Goldring, Roberta L. Goodman, Bill Robinson, and Julie Tammivaara. (1996). Manual for the CIJE Study of Educators. Version 2.0.
5. Gamoran, Adam, Ellen B. Goldring, Bill Robinson, Julie Tammivaara, and Roberta L. Goodman. (1996). Teachers in Jewish Schools: A Study of Three Communities.
6. Goldring, Ellen B., Adam Gamoran, and Bill Robinson. (1996). Educational Leaders in Jewish Schools. Presented at the Annual Meeting of the American Educational Research Association, New York.
7. Professional Development Program Survey. (1996). Instrument for use in evaluation of the CIJE Teacher-Educator Institute.
8. Robinson, Bill. (1996). Coding Instructions for the CIJE Educators Survey.
9. The CIJE Manual for Evaluation in Jewish Education (in preparation).

Local Distribution

10. Goodman, Roberta L. (1993). The Professional Lives of Jewish Educators in Milwaukee.
11. Rottenberg, Claire. (1993). The Professional Life of the Jewish Educator: Atlanta.

12. Tammivaara, Julie. (1994). Professional Lives of Jewish Educators in Baltimore.
13. Gamoran, Adam, Ellen B. Goldring, and Roberta L. Goodman. (1994). The Teaching Force of Milwaukee's Jewish Schools.
14. Gamoran, Adam, Ellen B. Goldring, and Julie Tammivaara. (1994). The Teaching Force of Baltimore's Jewish Schools.
15. Gamoran, Adam, Ellen B. Goldring, and Bill Robinson. (1994). The Teaching Force of Atlanta's Jewish Schools.
16. Goldring, Ellen B., Adam Gamoran, and Bill Robinson. (1995). Educational Leaders in Baltimore's Jewish Schools.
17. Goldring, Ellen B., Adam Gamoran, and Bill Robinson. (1995). Educational Leaders in Atlanta's Jewish Schools.
18. Goldring, Ellen B., Adam Gamoran, and Bill Robinson. (1995). Educational Leaders in Milwaukee's Jewish Schools.

(Note: Several reports on community mobilization were also prepared for CIJE internal use. In one case, an evaluation report on a local project was prepared for a community.)