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

Series D: Adam Gamoran Papers. 1991–2008.

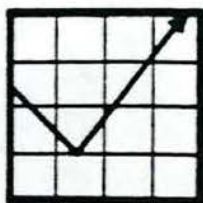
Subseries 5: General CIJE Files, 1991–2008.

Box
67

Folder
6

Bank, Adrienne. "The Jewish Educators' Evaluation Guide."
Planning correspondence. Annotated table of contents,
1996-1997.

Pages from this file are restricted and are not available online. Please
contact the [American Jewish Archives](http://AmericanJewishArchives.org) for more information.



A&M Bank Consultants, Inc.

4949 Ethel Avenue □ Sherman Oaks, California 91423 □ 818-784-7399
Fax 818-784-2202

April 30, 1996

Dear Ellen,

This is a short note to get you some background information which will be helpful for our more substantive conversations in the near future.

Unfortunately, about a week ago, I threw my back out, and have been horizontal much of the time. Needless to say, my schedule is also severely out of whack as a result.

I am sending you a vita (non-academic) along with a write-up that appeared in the UJ's MBA newsletter -- just so you have a sense of what I have been doing since I left UCLA in 1990.

I am also sending you a chapter that I wrote about four years ago for a book on clinical sociology. It is not at all the style that I would contemplate for the Evaluation Guidebook that you are considering. The prose would be far more conversational; and the format would be much more inviting and easier to read.

In addition to the work that I did on evaluation training while I was at UCLA at the Center for the Study of Evaluation, I have been orienting many different kinds of people in the Jewish community to program evaluation -- Boards and staffs of Federations, Bureaus, agencies, synagogues, schools. And, I do a lot of evaluation work in connection with Jewish Family Education at the Whizin Institute. In addition, I've done many many workshops for staffs of non-profits through the Center for Non-Profit Management here in Los Angeles. So I have the amateur evaluator's needs clearly in mind.

I will do for you an annotated Table of Contents which we can then discuss more specifically, but I would guess that the Guidebook will deal with a straightforward list of topics such as: various perspectives on evaluation and how they have changed over the years, important evaluation terminology, alternative evaluation models and their advantages/disadvantages, the importance of the evaluation audience and the

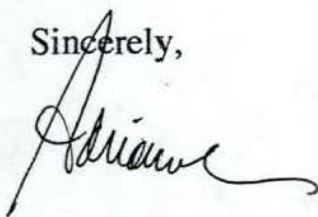
uses to which the evaluation will be put, the role of the evaluator, negotiating and staffing the evaluation, framing evaluation questions, creating the evaluation design, developing or finding instruments, using techniques such as surveys, active interviews, focus groups, case studies, collecting and analyzing data, dealing with issues related to politics, values, interpretations and recommendations, report writing and taking action based on the results of the evaluation.

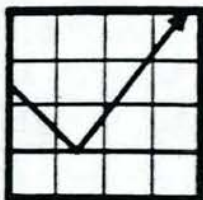
I would expect that there will be many lists, examples and cases scattered throughout the material and that there will be various appendices with sample forms, budgets, reports and references.

I am still not clear about how much time this will take me. I hope that there is some flexibility in your budget. While I do have handouts and short written explanations that I have already created for workshops and talks, I know from experience that these things take more time than one guesses in the beginning. Some of the materials I do have were developed specifically for the Whizin Institute, and for Jewish Family Educators. They are probably very appropriate for inclusion in this Guidebook in some form. At a later time, we should discuss how their contribution to this Guidebook might be acknowledged.

Unfortunately, I will be traveling during the first part of May. I will try to reach you sometime after May 9th to clarify what the next steps might be. I'm looking forward to working together on this project.

Sincerely,

A handwritten signature in cursive script, appearing to read "Adrienne", written in dark ink. The signature is fluid and extends to the right.



A&M Bank Consultants, Inc.

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ADRIANNE BANK, Ph.D. PROFESSIONAL BACKGROUND

Dr. Adrienne Bank is an independent management consultant providing policy, planning and evaluation assistance to non-profit groups in the general and Jewish communities. She specializes in strategic planning, program development, marketing and public relations, fund-raising, inter-institutional partnerships and conflict resolution. She works closely with Board members and professionals in improving their organization and programs. In connection with this work, she provides on-site and phone consultations, training sessions and retreats for Boards and administrators, and introduces them to techniques such as planning, needs assessments, strategic marketing, feasibility studies, self-studies, focus groups, cost/benefit analyses, survey research and grant writing. She has twenty years of research experience in areas such as innovation and change, dissemination and technology transfer, curriculum and program development, teacher training and evaluation.

Associated with the UCLA Graduate School of Education since 1972, Dr. Bank taught in the Graduate School of Education, was Associate Director of the UCLA Center for the Study of Evaluation and Associate Director of the experimental University Elementary School in charge of research, curriculum development, evaluation and teacher training. She is on the consulting staff of the Center for Nonprofit Management, is an adjunct professor in the MBA program at the University of Judaism, and is on the faculty of the Whizin Institute for Jewish Family Life.

As president of her own consulting firm, she has provided technical assistance to United Way and to many social service organizations in areas such as health, women's rights and homeless services. She has worked with public and parochial elementary and secondary schools as well as with district offices, state agencies and regional educational laboratories.

Within the Jewish community, she has worked with Federations, Bureaus of Jewish Education, JCC's, JFS's and family foundations. In the recent past, she has consulted for the Jewish Federation of Los Angeles, CLAL, Hebrew Union College, the National Hillel office, Jewish Vocational Services, and Jewish Family Services of Los Angeles. Among her projects during the past two years were an educational restructuring plan with the Atlanta Federation, an evaluation of the JEFF program for the Detroit Federation, a major review of ten innovative projects for the Covenant Foundation and strategic planning for Vista del Mar, Brandeis-Bardin Institute and the National Council of Jewish Women.

Dr. Bank's two books on educational management and program development were published by Teachers College Press and a monograph on evaluation was published by the Center for the Study of Evaluation at UCLA. She is the author of over forty articles and papers. She serves on many community boards and committees. She has a B.A. from Oberlin College, an M.A. from NYU and a Ph.D. from UCLA.

Faculty Profile

Adrienne Bank, PhD

In the 1990's, all of us are faced with the need to persevere and thrive in times of great uncertainty. Dr. Adrienne Bank, who teaches Strategic Planning (Management 405) for the MBA Program, works with nonprofit organizations in the general and Jewish community. She encourages them to make the most of the opportunities present in this cultural and social turbulence rather than seeing only the threats to their established way of doing things.

Working full time as an independent consultant since 1990, Dr. Bank helps diverse groups develop new strategic thinking along with new programming and new management techniques. These diverse groups include family foundations, Federations, Bureaus of Jewish Education and youth organizations such as Hillel and BBYO (B'Nai Brith Youth Organization) along with synagogues and social service organizations. Their goals range from developing new funding arrangements to creating new methodologies for community planning to inventing ways to engage young adults with the Jewish aspects of their identity.

For example, Dr. Bank's extensive consulting with the UJ's Whizin Institute for Jewish Family Education, where she does research and evaluation, teaches in their Summer Institute, co-edits an upcoming anthology, and helps the Institute achieve its goal of implementing family education as a cutting-edge field. She also serves as an active Board member for Jewish Family Service, where she works on conceptualizing new organizational partnerships to expand Jewish connections for interfaith families.

"I think the Jewish community is a hologram containing all the elements of social and cultural change which exists in the U.S. and even globally," says Dr. Bank. "The opportunities — some would even say the imperatives — are there for subcultures to preserve and value their own identities while being full participants in a larger civic society. These are difficult things to work out. For the Jewish community, I think study and learning is the key along with open attitudes and a renewed sense of spirituality."

To this end, she is connected with Metivta, a center for Jewish wisdom which makes the spiritual aspects of traditional Judaism available to contemporary seekers. She is also documenting the evolution of the new Synagogue 2000 project and finds herself consulting with more and more synagogues who want to think strategically about how they can creatively respond to today's young people, baby boomers, and empty-nesters.

Originally from New York City, Dr. Bank earned her B.A. from Oberlin College in Ohio and her M.A. in International Relations from New York University. Her two older children were born in Greece and Washington, D.C. before the family settled in Los Angeles in the mid-60's. Having taught high

dential and wound up receiving a Ph.D. in education fully funded by the Federal government. "It was the time when President Johnson's Great Society program was devoting a lot of resources to educational improvement and innovation," she says.

After getting her doctorate, she worked for John Goodlad's League of Cooperating Schools and then went on to be Associate Director for UCLA's Center for the Study of Evaluation where she and her colleagues tried to figure out how to evaluate the short- and long-term impacts of new educational programs. In 1985, she moved on to work with new ideas at University Elementary

School (UES), the experimental lab school on the UCLA campus. "UES was interested in concepts like school site management, team teaching and integrated curriculum long before they became popular. I worked with teachers on refining these ideas and making them practical. While there, I also helped create a program called Health Power which taught kids how to take charge of their own physical, emotional, and social health."

Children's education also played an important role in redirecting Dr. Bank's personal Jewish life. "When my youngest child wanted a Bar Mitzvah, my husband Mike and I went in search of a synagogue and found wonderful educators at Valley Beth Shalom. I got invited to join Rabbi Shulweis' first Para-Rabbinic class and that marked my re-entry into Jewish study and the Jewish community."

In the early 1980's, Dr. Bank was the independent evaluator for a review of the Los Angeles Bureau of Jewish Education where she became interested in the various educational improvement efforts going on in the Jewish community. Subsequently, she has worked in many aspects of Jewish education both locally and nationally. In 1990, when she became a full time consultant, she expanded her program evaluation and strategic planning activities to include many other kinds of organizations in the Jewish community.

Dr. Bank has an interesting and perhaps unique involvement with the Jewish community because she works with organizations who want to strategize creatively and are future-oriented. She notes, "Over the past five years, I've connected with numerous Jewish groups whose interests I share — in religion and spirituality, in family education and in empowering young people, in reconstructing interfaith relationships, and in promoting peace and democracy in Israel. These associations put me in the middle of many good changes going on in Jewish life today. I love doing this work. I'm definitely on the side of the optimists. As the saying goes: 'The pessimists may more often be right, but the optimists are more often successful.'"





May 6

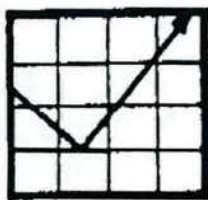
TO: Adam
Alan
Gail

From: Ellen

Re: Evaluation Manual

I recently received this material from Adnanne.
I'm passing copies on to you so we will all be
informed of where we are. I'll let you know
when I talk to her and get the Outline.

Ellen.

**A&M Bank Consultants, Inc.**

4949 Ethel Avenue □ Sherman Oaks, California 91423 □ 818-784-7399
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June 6, 1996

Dear Ellen,

I am enclosing the first draft of an annotated Table of Contents for an evaluation guide for Jewish educators. I am assuming that the audience are the educators themselves -- teachers, administrators, project directors -- and that they may be interested in evaluating programs for children, teens, adults, families or fellow-professionals in formal or informal settings. If there are some audiences I missed out in thinking about this, please let me know.

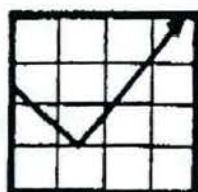
I am also making some assumptions as to the current state of practice -- for example, that there are few tests, even teacher-made ones, around in schools; that formal curricula and instructional materials with measurable goals and objectives are not frequently used in schools; that educators are, more often than not going to be their own evaluators rather than spend the money for outside trained evaluators; that "projects" that are funded by foundations or other granting agencies are more likely to be evaluated than are on-going school programs. Related to these assumptions, for example, are decisions about whether the guide should try to teach teachers how to make up and interpret various types of tests.

Before we go too much further, and based on this outline, we should talk more about your expectations for the book, its level of formality, what the graphics might look like, and your expectations about how it will be distributed and used. All of these influence decisions about the length/depth of each section and balance among the sections.

I'd also be interested in your views about how we think about "indicators of success" for the guide itself.

To further the discussion on some of the details that we touched on over the phone.

1. I could probably have various sections of this to you during the fall, but could not complete the project earlier than January 1, 1997.



A&M Bank Consultants, Inc.

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Discussion draft - 6/5/96
Adrienne Bank

THE JEWISH EDUCATORS' EVALUATION GUIDE

TABLE OF CONTENTS

SECTION 1 OVERVIEW

INTRODUCTION. (3 pages)

The author, her interests and her biases. How the book came to be written, who it is for, how it can be used. The role of the personal in evaluation. Utilization-focused perspectives. Evaluation in Jewish education. Overview of sections.

EVALUATION'S MULTIPLE PERSONALITIES. (5 pages)

Evaluation in the Jewish tradition. (*I will need a bit of help here*)
Evaluation as an empirically-based way of sense making. The epistemology of "knowing" through data gathering, data processing and data interpretation in contrast to other ways of "knowing."
Evaluation as a systematic way of learning from experience.
Cognitive mapping, problem identification and problem solving.
Evaluation as continuous feedback loops for managerial decision-making during program development. Formative evaluation as on-going course correction.
Evaluation as summary information for policy decision-making.
Summative evaluation and consideration of worth, merit, opportunity costs.
Interspersed in this segment will be examples of different types of evaluation from Jewish educational settings, formatted either as marginal notes or as graphic inserts.

THREE DECADES OF EDUCATIONAL EVALUATION. (3 pages)

Evolution of the field of educational evaluation. Discipline-based contributions and controversies; current status; the changing paradigms of evaluation; attitudes about evaluation related to

temperament, knowledge, previous experiences and role. Educational evaluation in Jewish settings - formal and informal; with children, teens, parents, families. What foundations/grantors now want. *Interspersed in this discussion will be a glossary of evaluation terms, formatted as above.*

SECTION 2 DOING EVALUATIONS

DO YOU REALLY WANT TO EVALUATE? ARE YOU READY? (3 pages)

Self-assessment of own and staff's ability to take risks, handle criticism, avoid burnout, be creative about alternatives, etc. The dollars, staff, skills, time, trust, personality characteristics needed to think seriously about either informal or formal evaluation. Evaluation as it occurs in Jewish settings such as classrooms, schools, programs, projects. *This segment will have text and examples. Much of the content will be embedded in checklists.*

WHAT DOES EVALUATION MEAN? (10 pages)

Distinctions between distributing questionnaires and evaluating; between testing and evaluating; between informal and formal evaluations; between formative and summative evaluations; between implementation and impact evaluations. The importance of understanding the purpose for the evaluation, the audiences for the evaluation and their preferences for qualitative/quantitative data. Suggestions for doing a stakeholder scan and bringing stakeholders into the conceptualization of the evaluation. Considerations of the "value" in evaluation. *This segment will have text and examples and tables listing typical Jewish education evaluation audiences and their interests (e.g., funders, lay leaders, parents, managers, participants, other professionals, media, etc.) as well as evaluation questions related to program implementation and program impact, etc.*

DATA COLLECTION: HOW? WHEN? FROM WHOM? (15 pages)

Brief discussion of subjective/objective distinctions, concepts of impartiality, fairness, validity, reliability, etc. A review of the various forms of tests (paper and pencil, performance, role playing, simulations), self-evaluations (essays, journals, portfolios) self-report formats (questionnaires, interviews, go-rounds, focus groups, journals, exit interviews, phone follow-ups), observation techniques

(structured, informal), record/documentation (minutes, attendance, budgets, portfolios etc.); expert evaluations. Short discussion of sampling. Short discussion of design: objectives-based evaluation; goal-free evaluation; pre/post studies; time series; follow-ups; case studies, etc.

Jewish education examples instruments and models will be in the appendix or in boxes.

FROM DATA ANALYSIS TO INTERPRETATION TO ACTION. (6 pages)

Descriptive statistics, graphic displays, qualitative analysis. Interpretation, inferences and implications. Presentation and discussion of results. Writing evaluation reports. Dealing with decision makers. Assessing the options. Taking action.

HOW TO EVALUATE EVENTS, MEETINGS, PROGRAMS AND PROJECTS. (12 pages)

Application of previous discussion to specific types of Jewish education situations. Examples with alternative evaluation possibilities.

(I'd like to collect these from the field and have them represent the full range that people encounter doing Jewish educational programs -- e.g., classes in Judaic, Hebrew for students; teens; adults, families, training,, conferences, retreats, camping, trips, etc.)

SECTION 3 EVALUATION ISSUES

EVALUATION ROLES AND SKILLS (4 pages)

Evaluating yourself. Evaluating your own work. Evaluating with colleagues. Encouraging others to evaluate themselves. Hiring an evaluator to evaluate your work. Being evaluated by an evaluator hired by others. Advantages of internal and external evaluation. Hiring, negotiating, working with, outside evaluators.

EVALUATION COSTS. (2 pages)

Cost estimates in time, dollars, opportunity costs. How to cost out an evaluation. Examples of evaluation budgets

EVALUATION CAUTIONS. (3 pages)

Premature evaluations. Unfair evaluations. Political evaluations. Negative fall-out from evaluations. Others.

EVALUATION BENEFITS (2 pages)

Evaluation as change agent, consensus builder, establisher of credibility, identifier of strengths, of activities/programs that work, etc.

APPENDICES

1. Sample instruments
2. Implementation evaluation questions
3. Impact evaluation questions
4. Evaluation cases and discussion questions
5. Readings and references
6. Resources



letter. Questions about the substance of the project may be directed to Ellen Goldring.

Sincerely,

Alan Hoffmann
Executive Director



Subj: No Subject

Return-path: <AdrienneDB@aol.com>

Received: from emout17.mx.aol.com (emout17.mx.aol.com)

by ctrvax.Vanderbilt.Edu (PMDF V5.0-7 #11488)

id <01IEL6C5UNDC8XS055@ctrvax.Vanderbilt.Edu> for

Goldrieb@ctrvax.Vanderbilt.Edu; Fri, 24 Jan 1997 10:25:24 -0600 (CST)

Received: (from root@localhost) by emout17.mail.aol.com (8.7.6/8.7.3/AOL-2.0.0)

id LAA05438 for Goldrieb@ctrvax.vanderbilt.edu; Fri,

24 Jan 1997 11:26:44 -0500 (EST)

Date: Fri, 24 Jan 1997 11:26:44 -0500 (EST)

From: AdrienneDB@aol.com

Subject: No Subject

To: Goldrieb@ctrvax.Vanderbilt.Edu

Message-id: <970124110743_241153567@emout17.mail.aol.com>

Content-transfer-encoding: 7BIT

Hi Ellen. I am chugging along on the Guide and I think it is coming out well. Major revisions are happening. I've figured out how to get lots of examples from Jewish settings into the text -- related to programs such as family education, israel experience, Fed-synagogue grants initiatives, professional development, etc without overwhelming the text. I've also simplified the design/questions sections, and eliminated a separate Events section, putting that material back into the program section A couple of things to think about: 1. do you want to have a short paragraph in the Preface about CIJE, what it is and why it sponsored this Guide? The Preface now has in it an very much revised overview of the Guide, a note to the reader about how to use the guide, and a brief introduction to my background and perspectives on evaluation. 2. What ideas do you have for names? Think Evaluation: A CIJE Guide to Evaluating Programs in Jewish Settings may not seem to include Do Evaluation. I'm currently rolling around Harken as the word before the colon. I hope we can come up with something that has a little surprise in it and is easy to remember. 3. The formatting and graphics for this Guide will be really important as there are lots of Figures of many different types -- examples, worksheets, lists, etc -- and they should be easily differentiated from one another. Perhaps we should also think, when we format the Guide, about people wanting to xerox sections. We probably want running headers for identification as well as pages that lie flat and that fit well onto the xerox screen. 4. When is your meeting with the funder? How many copies of the "almost final" (ie. perhaps missing a figure or two) version will you need by next week?

----- End forwarded message

----- End forwarded message

Note: I will be using better quality paper when I "publish" it, so the letters won't bleed as much.

Ellen and Adam,

Please find enclosed a draft of the beginning pages of Bank's evaluation Guide:

- Cover (in color)
- Title page
- Copyright page (I need to know what to write)
- Preface (including section "About CIJE" for which I need to know what to write)
- Chapter 1

I'm sending this to you for your review, suggestions, and approval. The full draft is in Arial 12 point with 1 column. I've also included version (of page 6) in:

- Arial 12 point with 2 columns (newspaper style)
- Arial 11 point with 1 column
- Arial 11 point with 2 columns (newspaper style)

Bill

ON EDITING

I have found (so far) the ideas and flow of the Guide to be excellent. However, the text could use some additional editing in order to better convey the ideas, especially to a lay audience. I can picture each section in Chapter 1 beginning with a question, such as:

Why should we evaluate these programs?

What is evaluation?

How do we begin?

respectively corresponding to the second through fourth sections in the chapter.

The text would be focused on answering each question. Thus, in the section that could be titled, "**What is Evaluation?**," the section would end with a re-statement that evaluation is only a more thoughtful process of community learning (that we already do in a non-formal way). Currently, the text wanders off of this point, thus lacking the "punch" it could have. I'm suggesting this for after your meeting.

We could even set-off an abbreviated answer to each question within the section (similar to what I did for the revised Baltimore report, though muted).

INTERESTING BUT OFF FOCUS

Also, parts that are interesting but not central to answering the question, can be placed in a box and (even) receive extended treatment, such as the discussion of what others in the secular community are doing.

To Adam
2 hope
his is
close to
maxym
had in
mind
If not, let
me know
H.

TO: CIJE Reviewers: Steve Chervin, Adam Gamaran, Ellen Goldring, Barbara Neufeld, Susan Stodolsky

Other Reviewers: Vicky Kelman, Rachel Levin, Jeff Shein

FROM: Adrienne Bank

RE: First draft - Evaluation Guide for CIJE

Thank you so much for being willing to sort through this bulky set of materials. It constitutes a spotty first draft for the CIJE Evaluation Guide. I need your advise on what is superfluous and should go, what is valuable and should remain, and how to arrange that which remains in an easy to use format.

The annotated Table of Contents is the easiest way to grab hold of what I tried to do. The Perspective piece tries to make the argument for evaluation in the Jewish community. It should probably be shorter. What points now in it should be emphasized?

After much struggle, Section 1 on Program Evaluation seems to be a workable outline. The Preparing For Program Evaluation part seems to be useful with the Cases that I describe in the Section 4. In the Framing the Evaluation part do the types, the models and the indicators get impossibly muddled? I'd be interested in your reaction to including Indicators in this piece. I haven't written about them yet, but when I've done workshops, both the Cognitive and Affective taxonomies appeal to people, as does the Voices one from Women's Ways of Knowing. I also want to make several points about Jewish Social Indicators and how they may not be influenced as much by programs as they are by larger social forces. I haven't finished Collecting the Data and the Analysis and Interpretation parts. I know that it is important to sort out from the voluminous evaluation literature what is relevant to Jewish education, and I'd love some guidance.

I think the Section 2 Event Evaluation material can be useful, practical, short how-to's. This section is not yet written but it is fairly clear in my mind. So is Section 3 on Special Issues.

In arranging the material, I tried to separate the figures from the text -- the figures should stand alone and be xeroxable. They may need some more reworking.

Any general and specific assistance you can offer will be most welcome.
For example:

- In your view, who should be the audience for this Guide, and have I addressed their concerns? How will they use it? What else beside the Guide will they need if they are really going to do a program evaluation? Will the Bibliography be helpful? Should we include a list of consultants?
- Which of the Sections/pieces should be downsized, upsized, added to, modified? Are the Cases and the Q & A good to keep? Are there better examples than the ones I've included?
- What about the general views expressed in the Guide?
- Is the tone OK? I keep sliding around in terms of style/voice -- should it be conversational? formal? first/second/third person?

Due to some unanticipated major surgery, I'm behind on producing and pruning this document. Your feedback will help me separate forest from trees. If you could possibly fax, (818-784-2202), phone (818-784-7399), Fed-ex (4949 Ethel Avenue, Sherman Oaks, Ca 91423) or E Mail (AdrianneDB@AOL.COM) your reactions sometime during the week of December 2, I would be most appreciative. .

Thank you so much for your assistance.