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CIJE Evaluation Institute. CIJE-JESNA Evaluation Consortium.
Planning notes and correspondence. Proposal drafts, 1995-1997.

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GAMO\$ type evalinst.cmt

From: EUNICE::"74104.3335@compuserve.com" 21-MAY-1995 13:31:42.87
To: "INTERNET:GAMORAN@ssc.wisc.edu" <GAMORAN>
CC: Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>,
myself <74104.3335@compuserve.com>
Subj: draft proposal for eval inst. -- comments welcome

Adam,

The proposal for the Evaluation Institute seems pretty fine to me. I have one (major) concern, related to the "(p)articipants in the three seminars would probably meet together on occasion...".

The design focuses upon the following:

- a. giving Federation lay and professionals knowledge of evaluation (Seminar I);
 - b. giving evaluation experts knowledge of Jewish education (Seminar II).
- (I think the third seminar, while a necessary component, is not as fundamental.)

What is MISSING is "when do the evaluation experts learn about the context in which their evaluation will be implemented and received". Whose their audience? In other words, the political nature of federation-community relations as they are played out in planning efforts influences how evaluation (of Jewish educational initiatives) could/should be done. They are evaluating for an audience that from academic and even social service perspectives is very different (and somewhat dysfunctional).

This was the point to having these three types of people (NOT the "nuts and bolts" people) learning together. I do not believe that the CIJE has the expertise to teach Federation politics to evaluation experts. However, we could facilitate a learning process among the Federation lay & professionals and the evaluation experts, within the context of on-going seminars. (I also think something is added if this team learning takes place with teams from several communities together, as opposed to teams learning separately within their individual communities.)

THUS, I would CHANGE the "Design" part of the proposal, so that Seminar I and Seminar II are held simultaneously. This would involve separate meetings for Federation people and evaluation experts, AS WELL AS meetings for both together. (In the large group meetings, I would expect that there would be time for large group discussions and community team exercises.) - This idea was mentioned during the last telecon.

In addition, having the "team" together at the seminars could facilitate the development of "good working relations" among the different partners.

As you can tell, this is going to be my "PET ISSUE". Evaluation research should be (explicitly) 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 that "know" the context and those that "know" about evaluation (along with the CIJE and others that "know" about evaluation of Jewish education), in order to learn together. We don't know enough, yet. Thus, a possible product of the seminars could be a guidebook on conducting evaluation research on Jewish education in the context of Federation-based planning efforts.

Bill

DRAFT PROPOSAL

CIJE EVALUATION INSTITUTE

PURPOSE

A guiding principle of the 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 outsiders 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

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 major part of the content for the first year. However, since we expect the Lead Communities to participate in the seminars, the personnel study cannot constitute the entire curriculum.

STAFF

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

From: EUNICE::"GOLDRIEB@ctrvax.Vanderbilt.Edu" 21-MAY-1995 13:46:36.61
To: GAMORAN
CC: 74104.3335@compuserve.com
Subj: Re: draft proposal for eval inst. -- comments welcome

I like the draft proposal, a few minor points:

1) I would delete second paragraph, this topic is open for interpretation, and may take away from the overall proposal and is not necessary as a rationale, because even if MEF was evaluating programs, there is still a need for a larger emphasis on evaluation in other communities beyond the three LC's, etc etc.

2) Somewhere in the rationale section, perhaps towards the end is the point I made at the Steering COM. about creating on-going long term commitment from consultants or others who do evaluation, rather than a one-time project approach. This would lead to an accumulation of both knowledge as well as evaluation results that should help decision makers over time. This is also an important part of capacity building.

The other point is by sending people to this institute (and paying etc) it represents a commitment on the part of funders and federation to actually begin to entertain issues of evaluation (I won't go as far as saying they will actually do it...) more seriously.

3) I'm not sure that Seminar 2 and 3 cannot be combined, depending on the level of the people who come. If we do not get "top level" folks as in Seminar 2, then 3 will be very very necessary, and that is my hunch, but I could be wrong. I'm not convinced yet that folks like Barry's wife really need to come to an institute, unless level 2 is really for people totally outside of the Jewish communal world.

That's it, for now. e.

Susan Austin - evaluator - CA
Steve Bayer - Hartford planner
Adabeth Cutler - Montclair State - NJ Network for Personal
Gail Dorph
Paul Flexner
A G
E G
M Guss
Barry Holtz
N R
John Paskey - continuity in NJ
Bob Hristler - DC planner
Susan Sheritz G phone

(C Botwinick & L Litten are in Isr)
Alan

J W

L I

leora_isaacs@cifny.org

— outsiders are coming to advise us on
developing joint JESAA / CIF project

I spoke with Alan today about the JESNA meeting. I was worried because it seemed to me that we were entering the meeting with a blank slate. That's not the case at all. Rather, we have a clear, coherent approach for the meeting:

We've designed a plan for an institute for evaluation. This plan satisfies a number of our varied goals: Dissemination of our approach to studying communities, building capacity for evaluation in communities, and establishing a national data base on the Jewish educational workforce. The plan involves a three- tiered seminar with strong linkages within and across communities.

The purpose of this meeting is to find out whether JESNA can help us implement this plan. We would welcome their participation, if we feel confident that it would be high quality. As you know, Alan has been working for some time to figure out a way to collaborate with JESNA, and this may be it, but only if JESNA's contribution is high quality. Most likely, this would require some sort of CIJE oversight of JESNA's role. But if JESNA can do some of the work, and do it well, that would be good for CIJE, since there is more than enough work to keep all of us busy for a long time.

If JESNA wants to implement some different program, or wants to participate in ours in a way that is not satisfactory to us, then we would decide to go our different ways.





FAX MEMORANDUM

TO: Susan Austin (415) 241-2746
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Adam Gamoran (212) 532-2646
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CC: Chaim Botwinick (410) 752-1177
Robert Hyfler (310) 230-7272
Susan Shevitz (617) 736-2070
Larry Ziffer (410) 752-1177

FROM: Alan Hoffman (212) 532-2646
Jon Woocher
Leora Isaacs

RE: Consultation on the proposed *CIJE-JESNA EVALUATION CONSORTIUM*

DATE: October 23, 1995

Thank you for agreeing to participate in the upcoming consultation on the proposed *CIJE-JESNA EVALUATION CONSORTIUM*. The consultation will take place at the CIJE offices in New York (15 East 26th Street, 10th floor) on Friday, November 3, 1995 from 8AM - 12 noon.

As we indicated when we invited your participation, CIJE and JESNA propose to establish a consortium to encourage and support evaluation initiatives in local communities. The purpose of the consultation is to allow us to benefit from the advice of experienced evaluators and trainers of evaluators on the one hand, and communal professionals knowledgeable about local needs and initiatives on the other as we move forward with our plans.

The goals of the consultation are to:

- 1) identify community evaluation needs and contexts, to ensure that the proposed initiative responds to community needs;

- 2) receive specific feedback about the enclosed *DRAFT PROPOSAL* outlining the purpose and design of the Consortium as a means of responding to local community evaluation needs;
- 3) discuss the content, formats, time requirements and potential participants for the proposed Evaluation Institute;
- 4) discuss mechanisms for the ongoing consultation and support aspects of the proposal;
- 5) outline resources needed to support the Consortium (*i.e.*, what would it take to make this happen?);
- 6) identify people to involve in various ways (*e.g.*, potential faculty, advisory group, Director, etc.);
- 7) suggest next steps.

We are looking forward to what is sure to be an illuminating and informative consultation, and to benefiting from your expertise and advice.





REVISED DRAFT PROPOSAL¹

CIJE-JESNA EVALUATION CONSORTIUM

PURPOSE

A guiding principle of both the CIJE and JESNA has been that evaluation is integral to initiatives in Jewish education. In this context, evaluation has three basic purposes:

- (1) to assist efforts to implement programs more effectively (*i.e.*, formative evaluation);
- (2) to determine, after an appropriate period of time, how well a program is achieving its goals, and whether it is sufficiently successful to warrant further effort and resources (*i.e.*, summative evaluation); and
- (3) to provide knowledge about what works and *how*, so that successful programs can be adapted for replication in new places (*i.e.*, process evaluation).

Efforts by CIJE to foster an "evaluation-minded" approach to educational improvement in its Lead Communities have begun to yield success. Federation staff acknowledge 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 evidenced by their use of findings from the CIJE Study of Educators as a basis for decision-making.

Over the past five years JESNA has become recognized as a national resource for consultation, planning and conducting program evaluations through its work with the Covenant Foundation, with national programs and with Continuity Commissions in communities across North America. JESNA's planning handbooks (*Planning for Jewish Continuity: A Handbook* and *Targilon: A Workbook for Charting and Planning the Course of Jewish Family Education*), utilized by growing numbers of communities and agencies, follow a classical planning approach in which ongoing evaluation is integral, and incorporated from the outset of the planning process. As a result, demands for JESNA's consultation and assistance in conducting evaluations for communities and national programs have increased far beyond the agency's capacity.

¹This document is based on an earlier version developed by Dr. Adam Gamoran for presentation to the CIJE Steering Committee (May 1995).

Furthermore, it has become clear that building a local capacity for ongoing evaluation holds far more promise for educational improvement than episodic external evaluation by a distant agency or by outside evaluators.

CIJE's experience in the Lead Communities and JESNA's involvement with continuity commissions, Covenant Foundation grantees and other programs has made it clear that, despite the best of intentions and good will, many community agencies lack the capacity to carry out evaluations of funded programs. In some cases, this is due to lack of knowledge and training on the part of agency staff; in others, evaluations are not conducted because running the programs consumes all of the staff's available time and energy, because evaluation may lead to undesired conflict; and/or because it is difficult to find qualified evaluators to conduct the desired evaluations.

The proposed CIJE-JESNA Evaluation Consortium is designed to respond to these communal needs. It will provide knowledge and motivation for evaluation by sharing expertise with a carefully chosen set of individuals from the communities with which CIJE and JESNA are working, and an ongoing support and networking facility as communities implement their evaluation processes. In addition, it will enable CIJE and JESNA to gather, interpret and disseminate information about Jewish educational program evaluation efforts.

DESIGN

Representatives of communities joining the CIJE-JESNA Evaluation Consortium will participate in a series of seminars (the Training Institute) over a 12-18 month period, and will have access to ongoing consultation, support and networking. The Consortium will be staffed by a Director (.5 FTE) responsible for designing, planning and implementing the Training Institute for providing ongoing consultation and support and for facilitating networking and sharing between Consortium members. The Director of the Evaluation Consortium will report to a steering committee comprised of representatives of CIJE, JESNA and two academic advisors.

The Training Institute will consist of a series of seminars for each of three constituent groups from Consortium communities:

- (1) *The Purpose and Possibilities of Evaluation* will cultivate local champions for evaluation. At least one federation professional and one top lay leader from each Consortium community will participate in seminars designed to help these leaders understand the need for evaluation, its limits and possibilities, and how to use findings to inform decision-making.
- (2) *Evaluation in the Context of Jewish Education* will create a cadre of local evaluation experts to work with communities to plan, implement and utilize evaluation processes for Jewish education projects and initiatives. Each community will identify and engage a

local expert in general evaluation (with training in social science research at the Ph.D. level, and experience in research on education, communities, public agencies, or related areas.) The purpose of this seminar is to provide a forum for discussing issues specific to evaluation in Jewish education and the Jewish community. Through this seminar, participants will become "resident Jewish education evaluation experts" for their communities.

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.

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Because advocating and supporting, planning and implementing evaluation must all be integrated, joint meeting(s) of participants in the three seminars will also be scheduled.

The content and format of the seminars will be designed by the Director of the Consortium in consultation with CIJE and JESNA staff. Instructors for the seminars will be drawn from a wide variety of fields, including both general and Jewish education.

Ongoing consultation, support and facilitation of networking and sharing will be provided by the Director of the Consortium. CIJE's experience with Lead Communities and JESNA's experience with local continuity commissions and other networks has clearly demonstrated that communities need ongoing support and advice once they return from seminars and institutes to begin the complex process of implementing what they have learned in their communities. Furthermore, networks do not spring up full-blown, but need to be nurtured and supported in order to function.

CIJE-JESNA EVALUATION CONSORTIUM
CONSULTATION

AGENDA

Friday, November 3, 1995
8 AM -12 Noon

- 1) Identification of community evaluation needs and contexts, to ensure that the proposed initiative responds to community needs;
- 2) Specific feedback about the enclosed *DRAFT PROPOSAL* outlining the purpose and design of the Consortium as a means of responding to local community evaluation needs;
- 3) Discussion of content, formats, time requirements and potential participants for the proposed Evaluation Institute;
- 4) Discussion of mechanisms for the ongoing consultation and support aspects of the proposal;
- 5) Determination of resources needed to support the Consortium (*i.e.*, what would it take to make this happen?);
- 5) Identification of human resources to involve in various ways (*e.g.*, potential faculty, advisory group, Director, etc.);
- 6) Discussion of next steps.



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CIJE/JESNA Consultation on Evaluation Institute
November 3, 1995
Adam's notes

The meeting had three main segments:

- (1) Problems of evaluation in Jewish education
- (2) How does the draft proposal for the Evaluation Institute (EI) respond to these problems?
- (3) What should our next steps be?

PROBLEMS OF EVALUATION IN JEWISH EDUCATION

After a lengthy discussion, we summarized the problems of evaluation that are particularly salient in the context of Jewish education as follows:

1. Professionals as gatekeepers -- professionals (principals, agency directors, etc.), who tend to be wary of evaluation, control access
2. Perceived threats -- related to the first point, professionals tend to see evaluation as threatening their positions and institutions
3. Stakeholders may want evaluation for p.r. but not for genuine knowledge
4. Culture of organizations is not supportive of evaluation
5. Need to build capacity for evaluation in communities
6. Need to reach a broader audience outside the community, to let others know what has been learned from evaluation
7. Broader purposes of evaluation within communities, e.g. build better relationships among persons from different institutions, improve planning
8. Salience of ideological differences within the Jewish community
9. Potential constituents/subjects lack understanding of evaluation (even more than in general education)
10. Federation/agency not interested in broader issues of change
11. Relation of national bodies (e.g. CIJE, JESNA, movements) to local communities
12. Insider knowledge makes it difficult to publish findings

DOES THE PROPOSED EVALUATION INSTITUTE RESPOND TO THESE ISSUES?

We did not address this question systematically, but discussed a number of relevant issues, which I have organized under five themes:

1. Political context of evaluation/ role of coordinator

- The context for the proposed EI is not the same as that for TEI. Because the perceived stakes of evaluation are high, and because of resistance to evaluation, the EI faces additional barriers to transfer from seminars to implementation.
- Some concluded from this issue that the EI coordinator would need to play a more political role than what was envisioned in the EI proposal. This person may need to serve as an activist on both the local and national levels.
- For the EI to have an impact on local evaluation, substantial development work will have to occur at the local level. Will the EI suffice to empower participants to carry out that work? Would the coordinator have to be involved at the local level?
- CIJE staff and consultants emphasized that based on CIJE's experience, it would be a mistake to conceive of the role of the EI coordinator as including provision of direct services to communities.
- On the one hand, there was consensus that the coordinator should have a solid background not only in education and evaluation, but also in Jewish community organization. On the other hand, some commented that it is important not to think too rigidly about the necessary background of the coordinator, but to be flexible so that the best possible person can be hired.
- Participants were unsure whether one 1/2-time position would suffice to carry out the coordinator's work
- Participants who work in Federations cautioned that although EI would emphasize educational evaluation, a demand for broader program evaluation would quickly emerge

2. Participation by communities

- There was consensus that communities would be interested in participating in the EI
- Because communities are at different places in their thinking about and appreciation of evaluation, it may be necessary to address different clusters of communities separately within the EI
- Communities should make some financial contribution to the EI, probably beyond the cost of travel and work time for their own participants. This is necessary to obtain communities' serious commitment. "If you don't pay for it, you don't feel it's worth it," was one comment.

3. Local experts

- The EI proposal is not clear on how the local experts are to be selected. What are the criteria? Who selects them?

Participants noted that potential experts need not necessarily be located in the participating communities.

4. Lay/professional group

-- The time demands for this group cannot be too great. Perhaps it would be best to start with a 2-day, one-shot forum for this group. It might then grow organically based on need.

5. Steering Committee

-- The Steering Committee mentioned in the EI proposal should include not only representatives of CIJE and JESNA, and academics, but also community organization experts.

NEXT STEPS

There was consensus that EI should go forward. Many participants urged beginning with a smaller number of communities (e.g., 4-5) than originally envisioned (12). Initial participants should view the early EI as a pilot which may be expanded in the future. Given the political challenges, and the untried nature of the EI, CIJE/JESNA should start small and move up. However, we were urged to keep moving.

Lay champions could be part of the EI faculty.

The next version of the EI proposal should be circulated not only to the group that met on 11/4/95, but to an audience of community lay and professional leaders, for response and buy-in.

In conclusion, CIJE/JESNA should go forward to hire a coordinator and begin the Institute with a small number of communities.

probs of evals in India

1. professionals as gatekeepers
2. perceived threats of eval
3. eval for p.r. vs real knowledge
4. culture not s-positive of eval
5. need to build capacity for eval
6. reach broader audience outside ^{comm}
7. broader purposes w/in communities,
-es. build better relations, encourage plans
8. ideological differences
9. potential const. threats/burits lack
underst of eval
10. central agency not interested in
broader issues of change
11. relat of nat bodies to local ^{comm}
12. insider knowl makes public diff.

✓ Q 7. situation is not same as test
- bcs of states, residence
- polit context more salient
test address

✓ Q 1. need for local development

(m 2. combining at diff stages
- together clusters?

✓ Q 3. degree of res

Q 4. activist - local & national
- polit role vs ed role

✓ Q 5. not just admin - hi level knowl
- skill - ed, eval (comm)
- person - can't be too rigid (feedback)

✓ Q 6. ident of parties
- partic local experts
- what context? who selects?

✓ Q 7. log/prog gap - time can't be too small
- start w/ 2-day forum
- grow gradually

✓ Q 8. steering center - need commun & p/p
C, J, ac

✓ Q 9. from ed eval to broader pos eval
- match at!

Consultation on E&I

Ruskay

1. evaluator is seen as from Fed anyway - helps to have evaluator in Fed - learns history
3. org change vs. building rel's community
2. eval process vs. eval assumptions behind process - ppt

Shevitz

polit aspects of eval

- resistance from congress - 2 1/2 yrs to get into congress
- gatekeepers are professionals
 - families, parents like to participate
- those at Fed don't always want the data

EG - taken those into acct in design - seed the culture

Gordon

- exper polit diff's as descr by Ruskay, Shevitz
- first outside eval - repeated document already had
- now - study of educators, qualit assess of projects
- compliance
- no votes not under Fed control - impact viability of inst'ts

percepts from inst'ts? some threats perceived

— AG's sense that culture is more open to eval in (love

Bayer

using market to sort out prog success or failure

who is the client for eval?

- CSC ? (commissioned by Bear, w/in Fed)

(embedded w/in P&A

supportive role w/ ^{those running} programs

Austin

these are classic probs of eval?

- who are constituents of consortium?

who intended to serve?

JW - graft eval into demand for acctg.

ADH - first constit - Fed pros who spt edc

- compliance is not main issue

Guriz - bldg a research capacity - broader than eval

62D - eval is perceived as more threatening - for acctg.

Cutler - ~~no money to waste in ed~~ ^{no money to waste in ed} - failure is "disgrace"

Shevitz

evaluation doesn't reach broad audience

WR

more purposes

Gail

forum to discuss issues

Woocher

think tank

gatekeeping

perceived threats

pr. vs. real knowledge

culture not supportive

need for capacity

reach broad audience

encourage planning, relate

think tank on evaluation

eval. instit. as resp?

Shevitz - role model ch on nat level

Gorris

forum for communities to share what they
sponsor studies that cross community lines

Astin

communities, are at diff stages - can they partner together?

Shevitz

too little staff time is allocated

trainer of trainers model
vs. more involunt at local level

LI - involved, a communitarian

Shewitz - activist - local + national

BH - orig. concep - coordinator, not nat leader
- is it poss?

- amt of time - could it be done? (what could be done?)

Cutler - not just administr

BH - right - educating researchers

GZD - not conceived as polit job, but as ed job
- also not conceived as "writing the command" job

Cutler - polit role is essential for long-term success

Flexner - polit role will happen no matter what

ADH - broad descrip of NITEE - lots of roles
- but given lim res, EI is way to start ^{- would be great}

Gurris - EI c3. integr w/ other instits

Bayen - need simple structure

LI - expertise: need knowledge base of evaluation - top of field
ADH - can't get top person E-t

Shultz - to get it going in community
will need lots of cheerleading, handholding, etc.

WR - expertise in eval, Ted, also 5 community
- use advisers/faculty to help

Austin - do we like this design overall?

- concern w/ segment of EI for local eval experts
- how identify? what criteria? who should select?
- only att experts' sem, or all?
- how will quality of expertise be identified?
- what does 12-18 mo. time frame mean?

Rustay - hypoth: training instit as designed is next step
- capacity on local level is key issue
- altern: a few communities work collaboratively

altern to CITE hypoth of community change
- go straight to instits
- need eval

Ellen

communities are not all in the same place
CITE cannot be in the direct service business

62D ^{2BH}

- TEI - to stim. staff devel to ch. clm. prac
- had probl. working in design of each prot dev. prog.
 - overwhelming - need to build local capacity
- took people currently working in central age work as prot dev.
- EI differs in that seeking to expand capacity
- pull in others to share work

Bayen

consultant in org devel would help too

— AG — too broad — misses the target — out of focus

Ruskay

go for people, don't mess decide beforehand

whether select persons trained in eval or J. common

— Cutler — nuts & bolts of eval would address

Shevitz

s. that is not same as + prof growth

— because of stakes, res. stance to eval

— polit context is much more salient

May need different clusters w/in seminars

- Gurus - flexibl w/ design may help resolve issues
- train persons ident. outside local contexts
 - lay/prof group - time cost may be too great
 - may need to start w/ 2-day forum on probs + poss. b.
 - emph networking more than training
 - grow organically
 - steering comte - need community rep, not just CJE/JESNA/...

Boyer

- moving from educ eval to eval of other progs
- lay leaders will move to that quickly
 - the indiv progs work as a total package to promote larger goal of Jewish continuity

Fuskar

- probs of mgmt - very complex
- why not creat nat firm to carry out eval?

Next steps

Gervais: consensus on what to pursue
create pilot + start

ADH: hire a person + find communities,
design curric + start in March!

Shewitz: polit features not in proposal

- given stakes + context, start small

- ADH - fewer commons - must underst this is pilot

- Austin - by what criteria are they selected?

- in new area, politically loaded, so slow is wise

- but keep moving

Boyer: funding - "if you don't pay for it, don't feel it's worth it"

NR: need lay champions for eval to lobby for it - ^{could be part of faculty}

Pustay: bring next version of EI proposal to lay/prof and
- set resp, get buy-in

From: IN:"74104.3335@compuserve.com" "Bill Robinson" 6-NOV-1995 09:08:09.05
To: IN:"gamoran@ssc.wisc.edu" "Adam Gamoran"
CC:
Subj: question?

Return-path: <74104.3335@compuserve.com>
Received: from eunice.ssc.wisc.edu by ssc.wisc.edu (PMDF V5.0-5 #12975)
id <01HXBFXHRA9S02IFG2@ssc.wisc.edu> for gamoran@ssc.wisc.edu; Mon,
06 Nov 1995 09:07:58 -0600 (CST)
Received: from arl-img-6.compuserve.com by eunice.ssc.wisc.edu; id AA10606;
5.65/43; Mon, 06 Nov 1995 09:08:49 -0600
Received: by arl-img-6.compuserve.com (8.6.10/5.950515) id KAA11220; Mon,
06 Nov 1995 10:06:26 -0500
Date: Mon, 06 Nov 1995 10:02:47 -0500 (EST)
From: Bill Robinson <74104.3335@compuserve.com>
Subject: question?
To: Adam Gamoran <gamoran@ssc.wisc.edu>
Message-id: <951106150246_74104.3335_GH@107-1@CompuServe.COM>
Content-transfer-encoding: 7BIT

Adam,

Can/Should I send this brief memo out to the staff?

Bill

To: CIJE staff
From: Bill Robinson

Re: CIJE/JESNA Consultation of Evaluation Consortium (Institute)
November 3, 1995

An idea concerning:
What should be the focus of the first seminar of the Consortium?

An important contribution of the Consultation was an increased understanding of the political and cultural context in which evaluation occurs in local Jewish communities. In particular, there are often many goals underlying an evaluation process (e.g., assessing if a program is reaching its intended outcomes, providing information for public relations, building better relations between Federations and agencies/synagogues), and these goals may conflict with one another. Yet, any one goal is not necessarily more important than another or the "true" purpose of evaluation. The Evaluation Consortium should take into account that evaluation in local Jewish communities does and perhaps should serve multiple goals. The purpose of the Consortium is to build the capacity of local communities to engage in evaluation, which should include the capacity to manage the conflicts embedded within an evaluation process that contains multiple goals.

Based on this, I proffer three guidelines for the first seminar of the Evaluation Consortium, which brings together lay and professional Federation Leaders from different communities with their local evaluation experts:

1. During the first seminar, the Consortium purpose of "building evaluation capacity" should be embedded within the larger theme of "community learning": How do Jewish communities learn? How can learning be improved in Jewish communities?
2. The purpose of the first seminar would be to increase the tension experienced by participants between "what is" and "what could be", through focusing

concretely on the way Jewish communities currently learn (i.e., the politics and multiple purposes of evaluation) and the way they could learn (e.g., increased participation in learning, greater emphasis on reaching explicit outcomes, learning being informed by the rigorous evaluation standards).

3. During the first seminar, the participants through the leadership of the CIJE and JESNA would begin to overcome the gap between "what is" and "what could be" by hearing stories of success (from other communities), exploring ways of overcoming this gap in their own communities (i.e., community mobilization), and committing to an evaluation project that they will undertake in their own communities.



From: IN%73321.1220@compuserve.com "Alan" 7-NOV-1995 15:34:15.71
To: IN%76372.2406@compuserve.com "Debra Abcdef"
CC: IN%73321.1217@compuserve.com "Gail Dorph", IN%GAMORAN@ssc.wisc.edu "Adam Gamoran", IN%GOLDRIEB@ctr.vax.vanderbilt.edu"
Subj: Adam's notes on the Evaluation Institute mtg with JESNA

Return-path: <73321.1220@compuserve.com>
Received: from eunice.ssc.wisc.edu by ssc.wisc.edu (PMDF V5.0-5 #12975)
id <01HXD7046P9G021PD1@ssc.wisc.edu> for gamoran@ssc.wisc.edu; Tue,
07 Nov 1995 15:32:58 -0600 (CST)
Received: from ari-imag-3.compuserve.com by eunice.ssc.wisc.edu; id AA18365;
5.65/47; Tue, 07 Nov 1995 15:33:36 -0600
Received: by ari-imag-3.compuserve.com (8.6.10/5.950515) id 0AA13183; Tue,
07 Nov 1995 16:31:11 -0500
Date: Tue, 07 Nov 1995 16:26:47 -0500 (EST)
From: Alan <73321.1220@compuserve.com>
Subject: Adam's notes on the Evaluation Institute mtg with JESNA
To: Debra Abcdef <76372.2406@compuserve.com>
Cc: Gail Dorph <73321.1217@compuserve.com>,
Adam Gamoran <GAMORAN@ssc.wisc.edu>,
Ellen Goldring <GOLDRIEB@ctr.vax.vanderbilt.edu>,
Annette MI Hochstein <annette@vms.huji.ac.il>,
Barry Holtz <73321.1221@compuserve.com>,
Nessa Papoport <74671.3370@compuserve.com>
Message-id: <951107212647_73321.1220_FHM45-10@Compuserve.COM>
Content-transfer-encoding: 7BIT

DSP:

THESE NEED TO BE DOWNLOADED AND CLEANED UP AS THE OFFICIAL
PROTOCOL - UNLESS OUR STAFF HAVE COMMENTS.

A.

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

From: INTERNET:GAMORAN@ssc.wisc.edu, INTERNET:GAMORAN@ssc.wisc.edu
To: Alan, 73321.1220
(unknown), INTERNET:GOLDRIEB@ctr.vax.vanderbilt.edu
(unknown), 74104.3335
(unknown), 73321.1217
(unknown), 74671.3370
(unknown), INTERNET:ANNETTE@VMS.HUJI.AC.IL
DATE: 11/6/95 7:52 AM

RE: Adam's notes on the Evaluation Institute mtg with JESNA

Sender: gamoran@ssc.wisc.edu
Received: from robij.ssc.wisc.edu by dub-imag-4.compuserve.com (8.6.10/5.950515)
id AAA28755; Mon, 6 Nov 1995 00:55:11 -0500
From: <GAMORAN@ssc.wisc.edu>
Received: from ssc.wisc.edu by ssc.wisc.edu (PMDF V5.0-5 #12975)
id <01HXAKWTS7406@SSA@ssc.wisc.edu>; Sun, 05 Nov 1995 23:54:18 -0600 (CST)
Date: Sun, 05 Nov 1995 23:54:18 -0600 (CST)
Subject: Adam's notes on the Evaluation Institute mtg with JESNA
To: 73321.1220@compuserve.com, GOLDRIEB@ctr.vax.vanderbilt.edu,
74104.3335@compuserve.com, 73321.1217@compuserve.com,
74671.3370@compuserve.com, Annette@vms.huji.ac.il
Message-id: <01HXAKWU11006@SSA@ssc.wisc.edu>
X-VMS-To: ALAN, ELLEN, BILL, GAIL, BARRY, NESSA, ANNETTE
MIME-version: 1.0
Content-type: TEXT/PLAIN; CHARSET=US-ASCII

Content-transfer-encoding: 7BIT

CIJE/ JESNA Consultation on Evaluation Institute
November 3, 1995
Adam's notes

The meeting had three main segments:

- (1) Problems of evaluation in Jewish education
- (2) How does the draft proposal for the Evaluation Institute (EI) respond to these problems?
- (3) What should our next steps be?

PROBLEMS OF EVALUATION IN JEWISH EDUCATION

After a lengthy discussion, we summarized the problems of evaluation that are particularly salient in the context of Jewish education as follows:

1. Professionals as gatekeepers -- professionals (principals, agency directors, etc.), who tend to be wary of evaluation, control access
2. Perceived threats -- related to the first point, professionals tend to see evaluation as threatening their positions and institutions
3. Stakeholders may want evaluation for p.r. but not for genuine knowledge
4. Culture of organizations is not supportive of evaluation
5. Need to build capacity for evaluation in communities
6. Need to reach a broader audience outside the community, to let others know what has been learned from evaluation
7. Broader purposes of evaluation within communities, e.g. build better relationships among persons from different institutions, improve planning
8. Salience of ideological differences within the Jewish community
9. Potential constituents/subjects lack understanding of evaluation (even more than in general education)
10. Federation/agency not interested in broader issues of change
11. Relation of national bodies (e.g. CIJE, JESNA, movements) to local communities
12. Insider knowledge makes it difficult to publish findings

DOES THE PROPOSED EVALUATION INSTITUTE RESPOND TO THESE ISSUES?

We did not address this question systematically, but discussed a number of relevant issues, which I have organized under five

themes:

1. Political context of evaluation/ role of coordinator

- The context for the proposed EI is not the same as that for TET. Because the perceived stakes of evaluation are high, and because of resistance to evaluation, the EI faces additional barriers to transfer from seminars to implementation.
- Some concluded from this issue that the EI coordinator would need to play a more political role than what was envisioned in the EI proposal. This person may need to serve as an activist on both the local and national levels.
- For the EI to have an impact on local evaluation, substantial development work will have to occur at the local level. Will the EI suffice to empower participants to carry out that work? Would the coordinator have to be involved at the local level?
- CIJE staff and consultants emphasized that based on CIJE's experience, it would be a mistake to conceive of the role of the EI coordinator as including provision of direct services to communities.
- On the one hand, there was consensus that the coordinator should have a solid background not only in education and evaluation, but also in Jewish community organization. On the other hand, some commented that it is important not to think too rigidly about the necessary background of the coordinator, but to be flexible so that the best possible person can be hired.
- Participants were unsure whether one 1/2-time position would suffice to carry out the coordinator's work.
- Participants who work in Federations cautioned that although EI would emphasize educational evaluation, a demand for broader program evaluation would quickly emerge.

2. Participation by communities

- There was consensus that communities would be interested in participating in the EI.
- Because communities are at different places in their thinking about and appreciation of evaluation, it may be necessary to address different clusters of communities separately within the EI.
- Communities should make some financial contribution to the EI, probably beyond the cost of travel and work time for their own participants. This is necessary to obtain communities' serious commitment. "If you don't pay for it, you don't feel it's worth it," was one comment.

3. Local experts

- The EI proposal is not clear on how the local experts are to be selected. What are the criteria? Who selects them? Participants noted that potential experts need not necessarily be located in the participating communities.

4. Lay/professional group

- The time demands for this group cannot be too great. Perhaps it would be best to start with a 2-day, one-shot forum for this group. It might then grow organically based on need.

5. Steering Committee

-- The Steering Committee mentioned in the EI proposal should include not only representatives of CIJE and JESNA, and academics, but also community organization experts.

NEXT STEPS

There was consensus that EI should go forward. Many participants urged beginning with a smaller number of communities (e.g., 4-5) than originally envisioned (12). Initial participants should view the early EI as a pilot which may be expanded in the future. Given the political challenges, and the untried nature of the EI, CIJE/JESNA should start small and move up. However, we were urged to keep moving.

Lay champions could be part of the EI faculty.

The next version of the EI proposal should be circulated not only to the group that met on 11/3/95, but to an audience of community lay and professional leaders, for response and buy-in.

In conclusion, CIJE/JESNA should go forward to hire a coordinator and begin the Institute with a small number of communities.



JESNA



730 Broadway, New York, NY 10003
(212) 529-2000 - (212) 529-2009 Fax



15 East 26th Street, New York, NY 10010
(212) 532-2360 - (212) 532-2646 Fax

MEMORANDUM

TO: Susan Austin
Steven Bayer
AdaBeth Cutler
Gail Dorph
Paul Flexner,
Adam Gamoran

Ellen Goldring
Mark Gurvis
Barry Holtz
Nessa Rappaport
John Ruskay
Susan Shevitz

CC: Chaim Botwinick
Robert Hyfler
Larry Ziffer

FROM: Alan Hoffman
Jon Woocher
Leora Isaacs

DATE: November 7, 1995

Thank you for joining us on Friday for the consultation on the *CIJE-JESNA EVALUATION CONSORTIUM*. Your comments and reactions provided us with the exactly the kind of feedback and information we need to move forward with our plans for a consortium to encourage and support evaluation initiatives in local communities. Clearly, the discussion between evaluators, academics and community professionals allowed us to hear and interweave the multiple perspectives which surely must be considered in planning this joint effort. Your questions and advice will assist us greatly as we amend and implement the design of the consortium.

As you will recall, at the end of the meeting participants agreed to jot down some final thoughts and to forward them to Leora Isaacs at JESNA (via FAX, snail mail or E-mail at <leora_isaacs@cjfn.org>). Please take a few minutes to do so while the thoughts are still relatively fresh in your minds. We hope that we can continue to turn to you and to benefit from your advice as we proceed.

Thank you again for your time, interest and the benefit of your experience and wisdom.

fax room 1206 (617) 236-5885
phone - Marriott Copely Place (617) 236-5800

1800 232 1234
AR19332

MEF TELECON AGENDA

November 13, 1995

- I. Future of Evaluations Institute - next step
a. Meeting w/Leora Isaacs at GA

who can lead it?
how will it be funded?
definit description
- job description

- II. January Consultation Day to "teach people to use the Manual"

- a. What is the state of the Manual

- Nessa is reviewing - needs to give lgs to Bill
- Bill will produce
- Alan will review layout of title page

walk thru study
Manual

what's involved

- from beginning to end
- pros & cons of why grant it

purpose: get parties to see G.S. picture

- power of data
- benefits to use our data collection systems
scope of work involved to do work at hi level



The Jewish Education Center of Cleveland

2030 South Taylor Road · Cleveland Heights, Ohio 44118

Phone (216) 371-0446 · Fax (216) 371-2523 *Fax*

*For Monday 11/13 release { 1) 620
2) 16/22
3) letter to me*

November 6, 1995
13 Cheshvan 5756

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Mark D. Gurvis
Managing Director

The JECC is a
beneficiary agency of the
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of Cleveland

To: Alan Hoffman ✓
Jonathan Woocher

From: Mark Gurvis *MG*

Re: Evaluation Consultation

Thanks for the opportunity to participate in last Friday's consultation on evaluation. I hope you found my participation meaningful; I certainly did. Since I was the one to suggest that participants share their ideas and reflections with you, following are the key points I would want to reiterate from the day:

1) The first seminar for professional/lay leadership may work best framed as an initial 2 day meeting which educates on the complexity and importance of the issues (a replay of our group's first hour and a half of discussion), to be followed by shifting this group to become the national forum for sharing of issues and experiences with evaluation. I don't think you'll get this kind of leadership 2-3 times/year for 2-3 days each time. But 1-2 one day meetings may serve the forum function very well, and be more achievable.

2) In terms of finding local researchers, it is likely that we will find different communities identifying different levels of people. Some might find local "experts;" others might find "nuts and bolts" types. Other finds might straddle these definitions. Communities need both; it's probably less critical for the "expert" to be local, since that level of consultation can be done by fax and phone, as we are doing with Adam. Also, great resource people from both areas may found in major academic centers which aren't in medium to large Jewish communities. We should give some thought to how to tap into these networks.

3) You need to give some thought to how this enterprise is going to relate to existing structural frameworks (JESNA's Mandell Berman Institute, the Association of Researchers in Jewish education). I think what gets created shouldn't stand alone from these efforts, but rather should become the driving force of their agenda.

4) There will need to be flexibility in accommodating a variety of local community perspectives in how they interpret needs and responses to your initiative. Communities will define things differently, and there's no way around this.

5) To the extent that there is a national steering committee for this project, it ought to include local community representation in addition to CIJE, JESNA, and academic representation.

I think the consultation was a very good start. I encourage you to press ahead, share back with the group the next iteration, get another round of feedback, and start.

Feel free to let me know how I can be further helpful. I am forwarding my expenses for the trip to the CIJE office.

11/9/95

Adam —

I would have
faxed this but its
a very poor copy.
ADH wanted you to
see it.

Thanks,

Debra

From: IN:"73321.1217@compuserve.com" "gail corph" 19-NOV-1995 20:06:43.16
To: IN:"gamoran@ssc.wisc.edu" "Adam", IN:"73321.1220@compuserve.com" "Alan", IN:"73321.1221@compuserve.com" "Barry", IN:"7332
CC:
Subj: letter to bdf members

Return-path: <73321.1217@compuserve.com>
Received: from eunice.ssc.wisc.edu by ssc.wisc.edu (PMDF V5.0-5 #12975)
id <01HXU80L120WOPFHE2@ssc.wisc.edu> for gamoran@ssc.wisc.edu; Sun,
19 Nov 1995 20:06:37 -0600 (CST)
Received: from arl-img-6.compuserve.com by eunice.ssc.wisc.edu; id AA01665;
5.65/43; Sun, 19 Nov 1995 20:07:44 -0600
Received: by arl-img-6.compuserve.com (8.6.10/5.950515) id VAA10851; Sun,
19 Nov 1995 21:05:11 -0500
Date: Sun, 19 Nov 1995 21:02:55 -0500 (EST)
From: gail corph <73321.1217@compuserve.com>
Subject: letter to bdf members
To: Adam <gamoran@ssc.wisc.edu>, Alan <73321.1220@compuserve.com>,
Barry <73321.1221@compuserve.com>, gail <73321.1217@compuserve.com>,
"INTERNET:GOLDRIEB@ctrvax.vanderbilt.edu"
Message-id: <951120020254_73321.1217_FHM38-1@CompuServe.COM>
Content-transfer-encoding: 7BIT

THIS IS A DRAFT OF A LETTER THAT I AM INTENDING TO SEND TO MEMBERS OF BUREAU
DIRECTORS FELLOWSHIP. PLEASE CHECK IT OUT AND MAKE ANY ADDITIONS AND / OR
CORRECTIONS. WE HOPE THAT IT CAN GO OUT ON TUESDAY. GAILTO: MEMBERS OF BDF

FROM: GAIL CORPH

RE: CIJE CONSULTATION ON EDUCATORS STUDY

November 21, 1995

During the BDF meetings at the GA, I had the opportunity to make a very short
statement about the current work of CIJE. (I am including a CIJE Update of
Activities with this letter as I didn't have sufficient copies to go around.)
As I said at that time, the CIJE has reviewed and updated the questionnaire and
survey and would like to share it those who are interested in conducting a
similar study in their own communities.

On Wednesday, I had an opportunity to meet with a small group interested in
talking together at greater length. Our conversation went beyond the survey to
questions of community organization and mobilization around issues of building
the profession and creating personnel action plans. I described at some length
two of the CIJE initiatives that had grown up as a result of the personnel
planning process: the Harvard Principals Institute and Teacher Educator
Institute. (Both of these are described in the Update.)

We agreed that CIJE would try to organize a consultation for people who wanted
to have a more detailed and far reaching discussion on the implementation of a
communal study of educators. We also agreed that part of the day long
consultation would include a discussion of the communal factors that make for
success in implementing the study and the planning process that comes after it.

Because this small group meeting took place at the same time as other work
groups, it was suggested that I send a mailing to all of the Bureau directors.

This consultation will take place at the Gutman Conference Center in Widener
Library at Harvard University on January 21 in order to accommodate those of you

who are planning to come to the JFA. It will begin at 9:30 am and conclude by 3:00.

Drs. Adam Gamoran and Ellen Goldring, the directors of the CIJE Monitoring, Evaluation and Feedback Process, will join the rest of our staff on this occasion. This will allow us to create an agenda that deals with the communal process, the implementation of the study and the analysis of the data.

If you are planning to join us, please send back that enclosed form no later than December 19.



JEWISH EDUCATION



ALVIN D. KATZ
CHAIR

LESLIE M. FRIEDMAN
VICE CHAIR

DR. CHAIM Y. BOTWINICK
EXECUTIVE DIRECTOR

November 21, 1995

ask
for
copy
of
study

Mr. David and Barbara Hirschhorn
The Jacob and Hilda Blaustein Foundation, Inc.
Blaustein Building
P. O. Box 238
Baltimore, MD 21203

Dear David and Barbara:

I trust this letter finds you and the family in good health and spirits.

Pursuant to our recent telephone conversation, Gail Dorph and I had an opportunity to meet with Dr. Barbara Neufeld in Boston last week, to discuss with her our plans for the David Hirschhorn Colloquium for Jewish Educators scheduled for Sunday, February 11, 1996.

David, I am delighted to inform you that Dr. Neufeld, one of the most outstanding educators in the field of educational evaluation, is available to lead and facilitate the session(s) relating to educational program evaluation and has prepared the enclosed brief review of what we developed together in Boston with respect to the format and content of the Colloquium.

I am also enclosing a copy of Dr. Neufeld's resume.

Gail Dorph, Dr. Neufeld, Marc Blattner and I welcome the opportunity to meet with you following your review of the enclosed material

As you know, Marc Blattner who is coordinating the administration of the Colloquium has already sent "hold-the-date-cards" to all invitees.

I look forward to speaking with you at your earliest convenience.

With best wishes.

Sincerely yours,

Dr. Chaim Y. Botwinick

cc: Darrell D. Friedman
Marc Blattner

Dr. Gail Dorph
Larry Ziffer

INITIAL THOUGHTS ON AN AFTERNOON OF PROGRAM EVALUATION

The major purposes of the initial evaluation sessions should be to introduce participants to the field of evaluation and make them aware of the possibilities and benefits of evaluation for their own continuing work in Jewish Education.

The afternoon will begin with an initial address of no longer than 45 minutes in which Neufeld and Cutler will present information that describes evaluation as a way of thinking, as a method of crafting questions that will 1) enable insiders to the programs as well as outsiders to judge the efficacy and impact of program features, and 2) provide them with information that can inform decisions about how to proceed.

We will identify the anxiety provoking features of evaluation and try to put them in the context of a process designed to provide usable, important information: evaluation as a learning opportunity. In dealing with this issue, we will discuss the need for organizations to create a culture in which evaluation data is used primarily for growth rather than punishment. However, we will note that evaluation can have consequences and that can be to the good.

We will describe different approaches to evaluation stressing that an evaluation design can be most effective when it is driven by theory; that is, by ideas about why a program is designed the way it is and how its components are thought to contribute to the desired outcomes. (I am stating this in abstract terms here; in the session, we will use many concrete and relevant examples, as we discussed, perhaps taken from the case of family education.)

After this introductory address, we plan to spend 45 minutes in a whole group discussion in which participants learn to develop evaluation questions that might provide them with data that would help them understand the progress and outcomes of their family education projects. The goal of this session will be to develop examples of the kinds of questions that an evaluation can address. We will take the questions that participants generate and sort them into types. Then we will discuss some of the issues that might be associated with gathering data with which to address them.

After a 15 minute break, we will reconvene in small groups (how small?) to have participants read a brief descriptive case of Jewish education and practice developing evaluation questions. In their groups they will 1) develop no more than 3 evaluation questions that they would like to be able to answer, 2) describe the kind of data they would want to have to answer the questions, and 3) discuss the feasibility of what they have proposed. Neufeld and Cutler will sit in on the groups' work to facilitate and answer questions.

For the last half hour, the whole group will reconvene to discuss the different groups' evaluation questions and strategies and ask the presenters additional questions. (This is feeling very rushed; we'll think more about the schedule.)

The last part of the program will ask participants to think of how they might like to evaluate the afternoon's work and the presenters. What did they learn? How do they know? What else might they want to know? What can they evaluate immediately? What might they have to evaluate over time?

BARBARA NEUFELD

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617-234-4353

EDUCATION

Ed.D. Harvard Graduate School of Education 1984
M.S. Southern Connecticut State College 1975
B.A. University College of Arts and Sciences, New York University
(Political Science and Psychology) 1966

RESEARCH AND EVALUATION EXPERIENCE

1984 - Education Matters, Inc., Cambridge, MA
President/Senior Research Associate
1978 - 1984 The Huron Institute, Cambridge, MA
Senior Research Associate

CURRENT RESEARCH AND EVALUATION PROJECTS

Principal Evaluator (10/95-12/97): The Edna McConnell Clark Foundation, Program for Student Achievement. Evaluation of Continuing Middle School Reform in Louisville, San Diego, Minneapolis, Corpus Christi, Long Beach, CA, and Hamilton County/Chattanooga.

Principal Investigator (3/95-12/95): The Annie E. Casey Foundation. Study of Promising Practices for Urban Students Making the Transition to Ninth Grade.

PREVIOUS RESEARCH AND EVALUATION

Principal Evaluator (10/93-9/95): The Edna McConnell Clark Foundation, Program for Disadvantaged Youth. Evaluation of Continuing Middle School Reform in Baltimore, Louisville, Milwaukee and San Diego.

Senior Research Associate (12/90-11/93): National Center for Research on Teacher Learning, Michigan State University. Study of Teacher Learning in the Context of School Restructuring.

Implementation of Dr. James Comer's School Development Project, Hartford, CT. (4/91-4/94)

The Edna McConnell Clark Foundation, Program for Disadvantaged Youth. Evaluation of First Phase of Middle School Reform in Jackson, MS; Chattanooga, TN; and Long Beach, CA. (10/92-9/93)

Evaluation of Weaver High School's "Coalition of Essential Schools" Reform, Hartford, CT. (6/92-12/92)

Citibank Faculty Project Evaluation, Coalition of Essential Schools, Brown University. (4/90-9/92)

Improving the Mathematics Performance of Low-Achieving, Middle School Students: A Teacher-Centered Model, Principal Evaluator (6/90-6/91).

Documenting the Growth of Professional Development Schools in Massachusetts, (9/89-10/90). Massachusetts Field Center for Teaching and Learning.

Annette
Barbara is already doing
some work for us -
she will be coming in
July. She is
Harvard Graduate School and
of Education
454 Guitman Library
Cambridge, MA 02138
617-496-4823
2 people
I want to
add to the group
advising
(beard)
Stodolsky
Susan
at Univ.
Chicago
A.

National Center for Research on Teacher Education, 12/85-12/90, Michigan State University, Senior Research Associate.

Evaluating Teachers' Use of "Writing To Learn" in the Washington, D.C. Secondary Schools, 1987-1988, and in the Reading, PA, Schools, 9/89-6/90, for the Council for Basic Education.

Evaluating Connecticut's Program to Improve the Quality of Cooperating Teachers' Work with Student Teachers, 1987-1988.

Evaluating the Independent Studies in the Humanities Fellowship Program for the Council for Basic Education, 1986-1987.

Evaluating The School Development Project in Middle Schools: Yale Child Study Center, Dr. James Comer, 6/86-6/87.

Assessing the Impact and Effectiveness of Critical Variables that Affect the Placement of Emotionally Maladjusted Secondary School Children: CT State Department of Education, 11/84-8/86.

TEACHING

Harvard Graduate School of Education, 1981-. Lecturer on Education. Teaching "Qualitative Methods for Research in Schools and Other Educational Organizations," and "Teaching and Learning: Links Between Research and Practice."

Boston College, Fall-Winter 1986. "Qualitative Research Methods."

Goddard College Experimental Program in Further Education, New Haven, CT. 1974-1977. Taught undergraduate teacher education courses; placed, supervised and evaluated student teachers in the New Haven public and private schools.

Truman Elementary School, New Haven, CT. 1970-1971. Classroom teacher in third/fourth grade combination class in bilingual school.

P.S. 150, Bronx, New York. 1967-1970. Classroom teacher for second and third grades in inner city, bilingual school.

SELECTED CONFERENCES AND PRESENTATIONS

The Harvard-Radcliffe Women's Leadership Project, Panelist: Women in the Classroom and Beyond. September 13, 1995

Neufeld, B. Teacher Learning in the Context of the School Development Program: What Are the Opportunities? What Is the Content? Paper presented at AERA, San Francisco, April 1995.

Evaluation Panel Presentation: Schools of the 21st Century, Yale University, July 1993.

Neufeld, B. Learning About Diversity While Learning to Teach. Paper presented at AERA, Boston, April 1990.

"Professional Development Schools in Massachusetts: Working with New Mixtures of Institutional Authority," Keynote Presentation at the First Meeting of the Massachusetts Professional Development Schools Network, Westborough, MA, October 30, 1989.

"Professional Practice Schools: The Context for Change," Presentation at the APT QUEST Conference, Washington, D. C., July 20, 1989.

"Multiple Purposes and Mixed Messages: Connecticut's Effort to Boost the Status of Teachers," Paper presented at AERA, San Francisco, March 1989.

"Learning to Teach From Teacher Education Courses," Paper presented at AERA, San Francisco, March 1989.

"Secondary School Reform in the United States: Efforts to Respond to Diversity," Keynote Speaker at the Australian High School Principals' Association 20th National Conference, Sydney, Australia, July 4, 1988.

"Learning from the Pioneers: A Synthesis of Issues Relevant to School/College Collaborations Designed to Create Professional Development Schools in Massachusetts." Paper presented to COMTEC (Commonwealth Teacher Education Consortium), West Springfield, April 28, 1988.

"Efforts to Improve the Field Based Component of Teacher Education in Massachusetts: Preliminary Efforts to Create Professional Development Schools." Colloquium presented at Michigan State University, April 21, 1988.

"Why Do I Have to Learn That? Prospective Teachers' Ideas About the Importance of the Subjects They Will Teach," Paper presented at AERA, New Orleans, April 8, 1988.

SELECTED PAPERS AND REPORTS

Neufeld, B. Improving Principals' Practices: The Influence of Professional Development on Principals' Work in Middle School Reform Efforts Supported by the Edna McConnell Clark Foundation. 1995

Neufeld, B. and La Bue, M. A. The Implementation of the School Development Program in Hartford, CT. Final Evaluation Report. 1994.

Neufeld, B. Professional Practice Schools in Context: New Mixtures of Institutional Authority. In M. Levine (Editor) Professional Practice Schools: Linking Teacher Education and School Reform. New York: Teachers College Press. 1992.

Neufeld, B. and Cutler, A. B., The Citibank Coalition Faculty Project: Second Formative Evaluation Report, Education Matters, Inc. November 1991.

Neufeld, B. Professional Development Schools in Massachusetts: Maintenance and Growth. Massachusetts Field Center for Teaching and Learning. June 1991.

Neufeld, B. and Cutler, A. B., The Citibank Coalition Faculty Project: First Formative Evaluation Report, Education Matters, Inc. October 1990.

Neufeld, B. Classroom Management and Instructional Strategies for the Disadvantaged Learner: Some Thoughts About the Nature of the Problem. In M. S. Knapp and P. M. Shields (Editors) Better Schooling for the Children of Poverty: Alternatives to Conventional Wisdom. Berkeley, CA: McCutchan, 1991.

Neufeld, B. Final Evaluation Report: Connecticut's Cooperating Teacher Training Program - Implementation Year 1987-1988. Cambridge, MA: Education Matters, Inc. March 1989.

- Neufeld, B. and Heavind, S. Professional Development Schools in Massachusetts: Beginning the Process. The Massachusetts Field Center for Teaching and Learning, Bridgewater, MA. June 1988.
- Neufeld, B. and Young, J. Writing to Learn in the Washington, D. C. Public Secondary Schools: An Evaluation of First Year Implementation. Prepared for the Council on Basic Education, June 1988.
- Neufeld, B., Exley, A., and Jorgensen, C. Strengthening the Role of Cooperating Teachers. The Clearing House. Vol. 61 (7) March 1988.
- Neufeld, B. "Evaluating the Effective Teaching Research." Harvard Education Letter, vol. 1 No. 8, November 1985.
- Neufeld, B., Gable, R., and Iwanicki, E. Hartford Effective Schools Initiative Evaluation Reports: 1) Planning Phase Report, July 1984; 2) Summer Institute Report, September 1984; 3) Fall Implementation Year Report, February 1985; 4) Final Implementation Year Report, August 1985.
- Farrar, E., Neufeld, B., and Miles, M.B. Effective Schools Programs in High Schools: Social Promotion or Movement by Merit? Phi Delta Kappan, Vol. 65, No. 10, June 1984.
- Farrar, E., Neufeld, B., and Miles, M.B. Effective Schools Programs in High Schools: Implications for Policy, Practice and Research. Paper prepared for the National Commission on Excellence in Education, April, 1983.
- Miles, M.B., Farrar, E., and Neufeld, B. The Extent of Adoption of Effective Schools Programs. Paper prepared for the National Commission on Excellence in Education, January 1983.
- Neufeld, B., Farrar, E., and Miles, M.B. Review of Effective Schools Research: The Message for Secondary Schools. Paper prepared for the National Commission on Excellence in Education, January 1983. Reprinted in Carlson, R.V. and Ducharme, E.R. Readings on School Improvement University Press of America, Spring 1986.
- Neufeld, B. Making Passive Students Active. Education Week. November 10, 1982.
- Deal, T.E., Neufeld, B. and Rallis, S. Hard Choices in Hard Times: Evaluation in Schools. Educational Leadership, 39, (4) January 1982.
- Cohen, D.K. and Neufeld, B. The Failure of High Schools and the Progress of Education. PARDALUS, 110 (3) Summer 1981.

SSCB\$ type neufeld.agn

From: IN%"73321.1220@compuserve.com" "Alan" 26-DEC-1995 06:57:01.81

To: IN%"neufelba@hugsel.harvard.edu" "Barbara Neufeld"

Subj: JAN 21ST CONSULTATION ON EVAL. INST.

Barbara hi,

I am sitting in Jerusalem with Adam Gamoran and we have been thinking about our meeting on the morning of Jan. 21st re the Evaluation Institute.

My suggestion is that the two and a half hours or so that we have be roughly divided into 2 parts:

a. Adam and Ellen (with Gail and me in support) should talk through our present thinking about the needs which such a program will serve and how it could be designed and operated. This would include our preliminary thoughts about the curriculum and the participants. As I mentioned when we met in Cambridge, we have deliberately not taken this design past a very initial stage, anticipating that the person who leads the Institute would flesh out the design.

b. You would share with us both past experience that you (or maybe others) have had in the training of evaluators and thoughts you may have for how such a program would work, content-wise and organizationally.

I hope you have:

a. Adam's initial memo presented to our Steering Committee describing the idea of an institute.

b. The paper from the CIJE/JESNA consultation on the topic.

c. The set of materials we sent to David Hirschorn - if you don't have those, Debra in my office in New York will send them to you.

Looking forward to seeing you - have e-mailed Eddy separately.

a.

what will be eval? broad

who wants it? lay

line btw eval - tech asst is blurred

BN - would ~~like~~ reg her to be involved ~ / common as at first
need to connect local expert ~ / local info

include a "trial"
agree that EI will not do the eval

BN should meet w/ Genuis, Hoffman, Ratner
- what info want, how will it be used
~~how to~~

categories of commons - 16 large, intermediate, small

disc of role of expert, where to find nuts & bolts

- ADH - expert is to guide g's, frame interp, emphasize of eval
- EG - ok, as long as underst that insuffic capac for nuts & bolts

role of expert

- wisdom
- lead a study, at least at first
- 2-3 days per month

criteria

- doctorate in soc sci, ~~not~~ / expertise in ed res
- res exper. credentials
- good writing skills
- exper. in applied res ~~not~~ / ~~emp. res required~~
- policy-oriented research
- appreciation for both qual. + quant. methods









MEMORANDUM

TO: Alan Hoffman
Gail Dorph
Barry Holtz
Adam Gamoran
Ellen Goldring
Bill Robinson

Jon Woocher
Paul Flexner
David Shluker

FROM: Leora Isaacs

SUBJECT: Evaluation Consortium

DATE: January 5, 1996

I'd like to share some thoughts on next steps for our collaboration, having had the opportunity to meet with Ellen at the GA and to review some very helpful feedback from Mark Gurvis and Susan Austin.

The following is a further revision of the draft proposal to establish a CIJE-JESNA Evaluation Consortium. It draws heavily on Susan's response and incorporates elements of Mark's feedback and the issues that Ellen and I identified during our conversation.

I'd like to suggest that we share initial reactions to this draft via the internet, and set a time early in January for our respective staffs to meet to decide how to proceed.

I'd also like to suggest that we seriously consider Susan Austin as director of the Consortium, and that if she is approached, that she be involved in our deliberations sooner than later. Her expertise and availability make her an excellent candidate for the position. I do not believe that her location (San Francisco) poses any major obstacle in light of electronic (and other) communication, and the fact that participating communities are likely to be located across North America.

I look forward to continuing our discussions on this matter.

DRAFT PROPOSAL 3

CIJE-JESNA EVALUATION CONSORTIUM¹

Overview:

This proposal outlines a three year initial effort that will result in a cost-efficient and effective model program for building local capacities for conducting ongoing evaluation of Jewish education programs in communities throughout North America. The outstanding feature of this model will be the development of an Evaluation Consortium designed to provide ongoing evaluation assistance, networking and support to all participating programs. The design and implementation of this project will be the shared responsibility of JESNA and CIJE. Partial funding of the Consortium will be provided by participating communities.

Rationale for Developing an Evaluation Consortium:

- 1) JESNA and CIJE are increasingly recognized as national resources for consultation, planning and conducting Jewish educational program evaluations. Demands for CIJE's and JESNA's consultation and assistance in conducting evaluations for communities (and national programs) have increased far beyond the agencies' capacity.
- 2) This demand arises from increased recognition in the field of the value of basing decisions on substantive information (e.g., CIJE's study of educators).
- 3) In addition, more and more of the newly funded (continuity) programs are setting aside funds for evaluation, and as a result they are looking to JESNA and CIJE for assistance.
- 4) Ongoing support and technical assistance to Jewish education programs will serve JESNA's and CIJE's interests to build local capacities for undertaking ongoing evaluation.
- 5) Ongoing evaluation support holds more promise for educational improvement than episodic external evaluation by a distant agency or by outside evaluators.

Evaluation Consortium Goals:

- 1) To provide Consortium participants with evaluation planning and implementation skills.
- 2) To provide Consortium participants with ongoing networking and support for their

¹This document is drawn heavily on the formulation of Dr. Susan Austin. It incorporates feedback from the consultation held on November 3, 1995, written feedback from Mark Gurvis and subsequent discussions with Dr. Ellen Goldring.

evaluation efforts.

- 3) To enable CIJE and JESNA to gather, interpret and disseminate information about Jewish educational program evaluation efforts.

Time Frame:

- 1) A three year time frame provides an opportunity to incrementally expand the Consortium with increasing numbers of participating communities, to maximize learning from initial small scale efforts, and to constantly adjust and modify Consortium practices.
- 2) After three years it will be necessary to re-assess community needs and determine the future of the collaboration.

Participants:

- 1) Application for Consortium membership will be open to federated Jewish communities in North America that are interested in developing local capacities for evaluating Jewish educational programs and are willing and able to assume the responsibilities for human and financial resources stipulated below.
- 2) Selection of participating communities will be determined in part by the criteria stipulated in the "phase-in" plan described below.
- 3) Proposed "phase-in" plan for increasing the number of participants:

Year 1 (Pilot Phase)

- ▶ Six federated Jewish communities in North America
- ▶ The six communities will represent three different stages of development:
 - a) communities that are earliest stages of planning Jewish education/continuity initiatives, and that will be able to incorporate an evaluation design into their initial planning. *(In all likelihood, these will tend to be smaller and intermediate-size communities);*
 - b) communities that are beginning to implement programs, and that may or may not have an evaluation component in place;
 - c) communities that are already into implementation but have no evaluation component in place or may need help with implementing/refining their existing evaluation plan.

- ▶ An effort will be made to see that there are two communities that meet the description of each of the three stages. In this way, pairs of similar communities will be addressing similar challenges and will be able to provide mutual support and shared learning.

Year 2 (Post Pilot Phase)

- ▶ Twelve federated communities in North America
- ▶ Six slots will be reserved for the pilot group and six slots for newcomers (two at each stage of development).

Year 3 (Full Implementation Phase)

- ▶ Eighteen federated communities in North America
- ▶ Twelve slots will be reserved for prior participants and six slots for newcomers (with even distribution among the three developmental stages)

Overview of Implementation Phases

Key Features of the Evaluation Consortium

- ▶ **Community Teams²**

Each participating community will create an Evaluation Consortium Team to include:

- ▶ local staff responsible for conducting evaluation (*e.g.*, from Federation, Central Agency for Jewish Education, Continuity Commission)
- ▶ Overseeing federation professional

² An important aspect of creating this team will be selection of the local evaluation expert and local staff responsible for conducting the evaluation. It will be necessary to develop criteria and to guide participating communities in making their selections.

The match between community needs, evaluators and evaluation experts will be critical. In some cases, it may be necessary to help smaller and/or more distant communities locate and identify evaluation experts outside (but in relatively close proximity to) their communities.

- ▶ Key lay leader
- ▶ Local evaluation expert (with training in social science research at the Ph.D. level and experience in research on education, communities, public agencies, or related areas)
- ▶ **Institutes**
- ▶ Evaluation Consortium Teams will participate in 2 two-day institutes during their first year of participation, and 1 two-day institute during each subsequent year.
- ▶ The institutes will provide in-depth sessions on such topics as the “getting ready” stage of evaluation (including issues of advocacy, financial resources, coordination, timing, planning, risk-taking and management); strategies for evaluating program effectiveness and efficiency, on program outcomes, on using evaluation data for making mid-course corrections, and strategies on sharing evaluation findings with the community. There will be separate track to accommodate different developmental stages of participating communities.
- ▶ **Ongoing Support and Networking Among Participating Programs**
- ▶ Create and share an easily accessible bank of Jewish education evaluation tools (*e.g.*, surveys, interview protocols).
- ▶ Develop and promote an “on-line” system of communication among participating communities (via e-mail, listserve, etc.).
- ▶ Promote the use of 2-4 regular teleconferences annually planned by participating communities in which special challenges and innovative solutions are explored.

Administrative and Staffing Structure

Advisory committee

The Advisory Committee of the Consortium shall include:

- 1) Professional staff from CIJE and JESNA (*i.e.*, the Executive Directors of CIJE and JESNA, as well as staff with primary responsibility for research and evaluation).
- 2) Two academic advisors (with expertise in program evaluation in Jewish

education)

- 3) Two community-based professionals (*e.g.*, planners with primary involvement with Jewish education/continuity issues, lead community professional staff)

Professional Staff

The Professional Staff of the Consortium shall consist of:

- 1) Director (.5 FTE)

The Director will:

- a) work with the Advisory Committee to continue to design and implement plans for the Consortium.
- b) help select participating communities.
- c) consult with and assist communities in identifying/locating team members, particularly evaluators and local evaluation experts.
- d) design and implement the curriculum and programs for the institutes and teleconferences.
- e) provide ongoing support and serve as a resource to communities by moderating the listserve, facilitating networking between consortium communities and providing consultation on a limited basis.

A highly experienced and “connected” educational evaluator with knowledge of the organization and politics of the Jewish community would be the ideal candidate.

The Director will oversee the work of the Administrative Assistant and Research Assistant and will report to the Advisory Committee.

- 2) Administrative Assistant (.5 FTE)

The Administrative Assistant will provide office and administrative support to the Director and Research Assistant.

3) Research Assistant (.5 FTE)

The Research Assistant will help the Director collect and disseminate research and evaluation resources for Consortium members, organize and disseminate "products" of the Consortium, and assist in organizing and administering the Institutes and teleconferences. A doctoral student in Jewish education with an interest (and experience) in social science, evaluation and/or educational research would be the ideal candidate for this position.

Budget

Funding Sources

- 1) Funds for staff salaries and overhead (including all administrative costs) will be assumed by JESNA and CIJE through regular budget and/or grant funding.
- 2) Participating communities will:
 - a) contribute an annual fee to the maintenance of the Consortium and its related services;
 - b) cover travel, room and board costs associated with participation of team members in the Institutes (and teleconferences);
 - c) dedicate an amount equivalent to 8-10% of its budget (of programs under consideration) for evaluation.

From: IN%"74104.3335@compuserve.com" "Bill Robinson" 18-JAN-1996 20:07:07.75
To: IN%"GAMORAN@ssc.wisc.edu" "INTERNET:GAMORAN@ssc.wisc.edu"
CC:
Subj: filters

Return-path: <74104.3335@compuserve.com>
Received: from eunice.ssc.wisc.edu by ssc.wisc.edu (PMDF V5.0-5 #12975)
id <01I0628P50GG017520@ssc.wisc.edu> for gamoran@ssc.wisc.edu; Thu,
18 Jan 1996 20:06:57 -0600 (CST)
Received: from arl-img-7.compuserve.com by eunice.ssc.wisc.edu; id AA27722;
5.65/43; Thu, 18 Jan 1996 20:09:15 -0600
Received: by arl-img-7.compuserve.com (8.6.10/5.550515) id VAA28730; Thu,
18 Jan 1996 21:06:24 -0500
Date: Thu, 18 Jan 1996 14:40:04 -0500 (EST)
From: Bill Robinson <74104.3335@compuserve.com>
Subject: filters
To: "INTERNET:GAMORAN@ssc.wisc.edu" <GAMORAN@ssc.wisc.edu>
Message-id: <960118194004_74104.3335_GH038-1@CompuServe.COM>
Content-transfer-encoding: 7BIT

As I mentioned in the last e-mail, the filter is:

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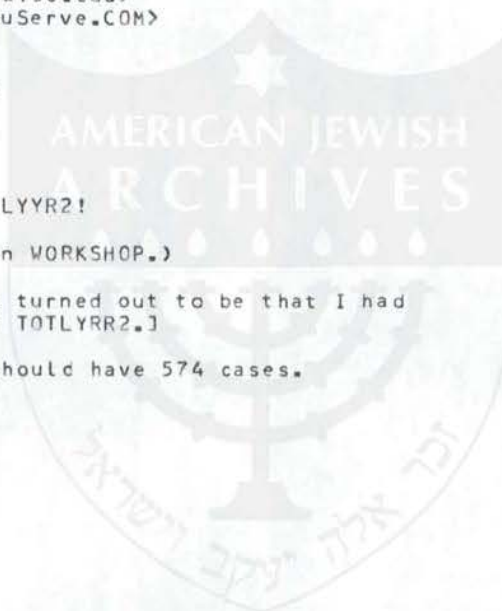
ALSO, you have to make certain that:

- There are NO user-defined missing values on TOTLYRR2!
- 99 is still defined as missing on WORKSPNO.
- (It doesn't matter if 0 is defined as missing on WORKSHOP.)

[The problem with the latter versions of the data turned out to be that I had not removed the user-defined missing value (0) on TOTLYRR2.]

When you run the correlation or regression, you should have 574 cases.

Bill



From: IN%"74104.3335@compuserve.com" "Bill Robinson" 24-JAN-1996 10:30:43.01
To: IN%"73321.1220@compuserve.com" "Alan Hoffmann"
CC: IN%"73321.1217@compuserve.com" "Gail Dorph", IN%"gamoran@ssc.wisc.edu" "Adam Gamoran", IN%"goldrieb@ctrvax.vanderbilt.edu"
"Ellen Goldring", IN%"73321.1221@compuserve.com" "Barry Holtz"
Subj: JESNA's view of the Evaluation Institute

Return-path: <74104.3335@compuserve.com>
Received: from eunice.ssc.wisc.edu by ssc.wisc.edu (PMDF V5.0-5 #12975)
id <01I0DVU2AY0G8WVZ0C@ssc.wisc.edu> for gamoran@ssc.wisc.edu; Wed,
24 Jan 1996 10:30:29 -0600 (CST)
Received: from arl-img-4.compuserve.com by eunice.ssc.wisc.edu; id AA23184;
5.65743; Wed, 24 Jan 1996 10:32:48 -0600
Received: by arl-img-4.compuserve.com (8.6.10/5.950515) id LAA07621; Wed,
24 Jan 1996 11:29:41 -0500
Date: Wed, 24 Jan 1996 11:28:00 -0500 (EST)
From: Bill Robinson <74104.3335@compuserve.com>
Subject: JESNA's view of the Evaluation Institute
To: Alan Hoffmann <73321.1220@compuserve.com>
Cc: Gail Dorph <73321.1217@compuserve.com>,
Adam Gamoran <gamoran@ssc.wisc.edu>,
Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>,
Barry Holtz <73321.1221@compuserve.com>
Message-id: <960124162800_74104.3335_GH097-1@CompuServe.COM>
Content-transfer-encoding: 7BIT

Per Alan's request, the following lists the significant differences between
JESNA's view of the Evaluation Institute (Consortium) as found in Leora Isaac's
memo of 1/5/96 and our (implicit) view.

All page numbers refer to Leora Isaac's 1/5/96 memo:

1. On page 1 (and on page 4), JESNA suggests that the participants will learn how to do evaluation (in general). [According to the memo, the participants will not necessarily learn about evaluation in Jewish education or the communal/Federation context in which evaluation will take place.]
2. On page 2, JESNA suggests a three-year time frame after which the continued need for the Consortium is (re)assessed and its future determined.
3. On pages 2-3, JESNA suggests that the first cohort consist of 6 communities (2 from each of the three Federation sizes); each year another 6 are added (again, 2 from each of the three Federation sizes).
4. On page 4, JESNA suggests having 2 two-day seminars during the first year of participation and 1 two-day seminar during each subsequent year.
5. On pages 5-6, JESNA suggests the following professional staff be hired: Director (.5 FTE), Administrative Assistant (.5 FTE), Research Assistant (.5 FTE).
6. On page 6, JESNA suggests that communities (a) contribute an annual fee, (b) pay travel, room and board costs for participants, and (c) dedicate 8% - 10% of program budgets (for programs under consideration??) for evaluation. [CIJE has not defined in detail the costs to communities, yet.]

From: IN%"neufelba@HUGSE1.HARVARD.EDU" 20-FEB-1996 15:17:38.20
To: IN%"73321.1220@compuserve.com" "Alan"
CC: IN%"73321.1217@compuserve.com" "Gail Dorph", IN%"GAMORAN@ssc.wisc.edu" "Adam Gamoran", IN%"GOLDRIEB@ctrvax.vanderbilt.edu"
"Ellen Goldring", IN%"neufelba@HUGSE1.HARVARD.EDU"
Subj: RE: CLEVELAND

Return-path: <NEUFELBA@HUGSE1.HARVARD.EDU>
Received: from eunice.ssc.wisc.edu by ssc.wisc.edu (PMDF V5.0-5 #12975)
id <01I1FV020P80019XF1@ssc.wisc.edu> for gamoran@ssc.wisc.edu; Tue,
20 Feb 1996 15:17:21 -0600 (CST)
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Tue, 20 Feb 1996 15:16:56 -0600
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20 Feb 1996 16:14:55 -0500 (EST)
Date: Tue, 20 Feb 1996 16:14:55 -0500 (EST)
From: neufelba@HUGSE1.HARVARD.EDU
Subject: Re: CLEVELAND
In-reply-to: <960220195003_73321.1220_FHM44-3@Compuserve.COM>
To: Alan <73321.1220@compuserve.com>
Cc: Gail Dorph <73321.1217@compuserve.com>,
Adam Gamoran <GAMORAN@ssc.wisc.edu>,
Ellen Goldring <GOLDRIEB@ctrvax.vanderbilt.edu>, neufelba@HUGSE1.HARVARD.EDU
Message-id: <Pine.PMDF.3.91.960220160047.749750A-100000@HUGSE1.HARVARD.EDU>
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Alan,
Timing is everything! I read my e-mail earlier, before your message had arrived and I just got off the phone with Sheila Allenick who wanted my social security number! I willingly gave it and asked her to have you e-mail me with further details. Did you write this before she called me. Anyway, I will call and make arrangements and let you know what they are. Are you able to get e-mail on this account when you are back in Israel? When do you leave the US?

I enjoyed the meeting on Sunday very much, although I didn't think of myself as the only "real" summer person there until you mentioned it. Perhaps next shabbat, I will re-read Soleveitchik's (sp?) long essay on the future of Jewish practice and the increasing role of formal schooling, rather than the home and informal practice, on defining its content. It may have relevance for the discussion of the BIG question Seymore Fox posed: what is the role of education in Jewish continuity? I found the article stimulating and somewhat disheartening the first time around.

I was also enlightened by your comment that I have come to know what I know about Jewish practice "anthropologically." This is largely true, although I hadn't thought of it either. One of the things I noticed right at the start of my relationship with Eddie is that people take me aside and let me in on the things they don't really do in their practice. This was always by way of assuring me, quite genuinely, that I would manage as a newcomer to the observant world. I could write a little piece on, for example, what some Orthodox women do while their husbands are at shul on Saturday morning. It isn't cooking or anything so terribly forbidden, but it might be listening to the radio. People have told me stories of Maimonides because they want to discuss things with someone who has no stake in the school and won't consider them a traitor. On the other hand, I have developed little knowledge of text that I didn't have before, because I don't read it.

The closest I come is discussions of the Saturday torah portion at lunch.

So, I am looking forward to the summer seminar as a beginning and as an entity of its own in which a group of us can learn together and figure out what we can do next with respect to Jewish continuity.

I'll be back in touch soon. Barbara



From: IN%"neufelbaa@HUGSE1.HARVARD.EDU" 9-MAR-1996 19:30:45.73
To: IN%"73321.1220@compuserve.com" "Alan Hoffman", IN%"gamoran@ssc.wisc.edu" "Adam Gamoran", IN%"goldrieb@ctrvax.vanderbilt.edu"
u" "Ellen Goldring", IN%"neufelbaa@HUGSE1.HARVARD.EDU", IN%"73321.1217@compuserve.com" "Gail Dorph"
CC:
Subj: Cleveland

Return-path: <NEUFELBA@HUGSE1.HARVARD.EDU>
Received: from eunice.ssc.wisc.edu by ssc.wisc.edu (PMDF V5.0-5 #12975)
id <01I259TDPJVK019CYC@ssc.wisc.edu> for gamoran@ssc.wisc.edu; Sat,
09 Mar 1996 19:30:41 -0600 (CST)
Received: from hugse1.harvard.edu by eunice.ssc.wisc.edu; id AA04392; 5.65/43;
Sat, 09 Mar 1996 19:30:18 -0600
Received: from HUGSE1.HARVARD.EDU by HUGSE1.HARVARD.EDU (PMDF V5.0-6 #4716)
id <01I25BU16AR4004NYF@HUGSE1.HARVARD.EDU>; Sat,
09 Mar 1996 20:28:28 -0500 (EST)
Date: Sat, 09 Mar 1996 20:28:27 -0500 (EST)
From: neufelbaa@HUGSE1.HARVARD.EDU
Subject: Cleveland
To: Alan Hoffman <73321.1220@compuserve.com>,
Adam Gamoran <gamoran@ssc.wisc.edu>,
Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>, neufelbaa@HUGSE1.HARVARD.EDU,
Gail Dorph <73321.1217@compuserve.com>
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MIME-version: 1.0
Content-type: TEXT/PLAIN; charset=US-ASCII
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I've just read the material that I got from Cleveland and it is quite impressive to see the range of projects that they have underway and their coherence. One could almost call it "systemic reform." If it is that, it's the first time I've actually seen it for real! The materials that I read include the Commission on Jewish continuity update report 1/96; the 1994-1995 Annual Report of the JECC, and the Goodman and Tammivaara proposal to study the professional lives of Jewish Educators and evaluate five COJC programs in Cleveland. I've gone back over my notes about the evaluation institute and what I might want to learn from this visit, but I am still not yet sure of whether I might miss key questions during this visit. So, I am asking for help. What are some of the questions you think I ought to ask?

Here are some that I have developed, roughly, so far. They are not worded correctly; they are just some ideas.

1. What kind of evaluation information do they need? This might include some questions about whether they want to know about the process, content, and outcome of programs; whether they want information with which to improve programs as well as make decisions about whether to continue them, and so forth.
2. What benefits have they found to having this kind of information, if they have any of it so far? What benefits to the evaluation process?
3. What are some of the concerns they face in attempting to deal with the information that they might get? Are there constituents, in other words, who might be upset by data/information? Might information fan the flames of some on-going debates to no good end? Are there any concerns/issues raised by the process of evaluation itself?
4. How have they gone about finding/developing the expertise to do the evaluation work? What do they know about the people they have hired?

What recommends them, in other words? If they think about increasing the pool of people who do this work (evaluation), what knowledge, skill, characteristics do they consider essential?

5. How have the different projects responded to the evaluations?

6. What is the role of the JECC and/or the projects/schools themselves in shaping the evaluation questions? In reading interim reports and making comments? and so forth?

7. What are their thoughts about how public they will be about the findings?

8. When they look to the future with respect to evaluation, what would they like to know and be able to do better than they know and do it now?

I can imagine answers to these questions helping me to understand what might be a "best use" scenario. What am I missing? Am I even close to getting the kind of information that might forward my purpose?

I leave on a 6:15am flight Tuesday morning, March 12, so any comments you may have by Monday night, I would truly appreciate. Thanks a lot. Barbara



From: IN%"neufelbaa@HUGSE1.HARVARD.EDU" 14-MAR-1996 12:29:13.87
To: IN%"73321.1217@compuserve.com" "Gail Dorph", IN%"73321.1220@compuserve.com" "Alan Hoffman", IN%"gamoran@ssc.wisc.edu" "Adam Gamoran", IN%"goldriebe@ctrvax.vanderbilt.edu" "Ellen Goldring"
CC: IN%"neufelbaa@HUGSE1.HARVARD.EDU"
Subj: Cleveland

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Received: from eunice.ssc.wisc.edu by ssc.wisc.edu (PMDF V5.0-5 #12975)
id <01T2RUKD8A188W031@ssc.wisc.edu> for gamoran@ssc.wisc.edu; Thu,
14 Mar 1996 12:29:05 -0600 (CST)
Received: from hugse1.harvard.edu by eunice.ssc.wisc.edu; id AA29527; 5.65/43;
Thu, 14 Mar 1996 12:28:28 -0600
Received: from HUGSE1.HARVARD.EDU by HUGSE1.HARVARD.EDU (PMDF V5.0-6 #4716)
id <01T2RWKND0VK0061DV@HUGSE1.HARVARD.EDU>; Thu,
14 Mar 1996 13:26:33 -0500 (EST)
Date: Thu, 14 Mar 1996 13:26:33 -0500 (EST)
From: neufelbaa@HUGSE1.HARVARD.EDU
Subject: Cleveland
To: Gail Dorph <73321.1217@compuserve.com>,
Alan Hoffman <73321.1220@compuserve.com>, Adam Gamoran <gamoran@ssc.wisc.edu>,
Ellen Goldring <goldriebe@ctrvax.vanderbilt.edu>
Cc: neufelbaa@HUGSE1.HARVARD.EDU
Message-id: <Pine.PMD.F.3.91.960314131707.281731A-100000@HUGSE1.HARVARD.EDU>
MIME-version: 1.0
Content-type: TEXT/PLAIN; charset=US-ASCII
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I found the Cleveland experience to be stimulating, enlightening, and troubling. Quite a lot for just one day. The people were terrific both in their personal willingness to take the time to talk to me and in their insights into the issues that they are attempting to change.

I'm not going to report in any detail here; I will do that in writing at a later date. But, it seems clear to me that one of the major dilemmas facing people who design and implement programs is lack of an image of what would be a satisfactory or good outcome. Coupled with this is the notion that even if they could come up with a good description of the outcome, it would probably differ by denomination. And, if it differed by denomination, it might satisfy the denomination but not strengthen the prospect of Jewish continuity. In a nutshell; standards are the issue here: what is good enough by way of Jewish knowledge, practice, affect to insure some greater degree of continuity. And, who should decide. These are difficult questions, and they seemed to permeate all of the discussions.

We did talk about evaluation of specific programs and we talked about programs and how they might fit together in to a gestalt that might influence Jewish identity. It was a thoughtful day of conversations.

I think that people were reasonably comfortable with me; don't think I made any great religious faux pas. You'll probably hear of them if I did.

If anything, I think the problem of Jewish continuity is more complex and problematic than I thought when my plane took off from Boston. More to come.

Gail, if I can bother you again with my question: what do you know about the travel budget for the summer? Barbara

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From: EAGLE::GAMORAN 20-MAR-1996 14:13:28.99
To: GAIL, ELLEN
CC: GAMORAN
Subj: evaluation manual

My recommendation is to ask Adrienne Bank, not Susan Shevitz.

Although we have not favored Adrienne's approach of entering, evaluating, and leaving, I don't think that would be a drawback in this case. She writes professionally and is a well-known and widely used evaluator.

Annette also thinks Adrienne would be acceptable. Here are her comments:

>Hi Adam,

>

>Just to say that of the list you suggest,

>I too would go with the name you put forward.

>I believe that if there no irreconcilable differences of

>view between the content you want for the manual and

>that person's views (and I don't think there are - though

>this should be checked) your suggestion is viable.

>I base myself on reading several research pieces by that

>person over the recent years.

>For whatever this is worth.

>Annette

>

In contrast, I have not been impressed by Susan Shevitz's writing, which I have seen in connection with the Research Network and a few things she has sent to me over the years. Please keep this opinion confidential. She was fine at our consultation with JESNA, but I am concerned about the writing. Perhaps you have seen more polished items that would lead to a different conclusion.

Adam



From: SSCB:SGAMDRAN 18-MAR-1996 13:56:02.32
To: ALAN
CC: ELLEN, GAIL, GAMDRAN
Subj: Evaluation Manual

Alan,

As you have seen from Ellen's messages, neither Barbara Neufeld nor Ada Beth Cutler is available to write the Manual for Program Evaluation in Jewish Education. Barbara might be able to do it next fall, but I know that's not soon enough for us.

Here are some possible alternatives we may wish to consider:

Adrienne Bank
Jack Ukeles
Susan Shevitz
Leora Isaacs
Julie Tammiyaara

For various reasons (which I will be happy to explain if you want), the only one on this list I'd recommend is Adrienne Bank. I suggest we ask her next. CIJE has tended to avoid her in the past, because her approach as an outside evaluator is not the approach that we are trying to cultivate. But it may not hinder her from doing what we are seeking for this Manual.

Adam



Education Matters, Inc.

P.O. Box 1656
Cambridge, MA 02238
617-868-0370

To : Adam Gamoran

From: Barbara Newfeld

Phone: 617-234-4353

Page 1 of 12

I welcome any comments - these
really a first draft -

Barbara

Education Matters, Inc.

P.O. Box 1656
Cambridge, MA 02238
617-868-0370

Page 1 of 11

To: Alan Hoffman
CC: Karen Barth, Gail Dorph
From: Barbara Neufeld
Date: November 10, 1996

Attached is the revised proposal that I wrote for the Evaluation Institute. It incorporates suggestions that Gail Dorph provided when we spoke Thursday evening last week. Also attached is a revised budget without travel costs. This budget is larger than the initial one, but more reflective of the actual time demands of setting up the Institute and making sure that it sets in motion a process of developing capacity. I do not think there is much value in merely providing a series of workshops. In addition, I am quite sure that if too little time is allocated to key personnel, they will be too fragmented in their work obligations to give this CIJE work sufficient attention.

Let me know what you think of the revisions. Not all of them are reflected in Avi's proposal because he did not have them. In addition, he had to abbreviate the plans in order to write a focused and appropriately brief overall proposal. I want you to see the larger plan and rationale for the activities.

I should add that this proposal is not yet reflective of changes that might occur as a result of meetings with the proposed Advisory Board. It is my own, individual best thinking about what to do.

I remain excited at the prospect of getting this enterprise up and running. I remain unclear about the organizational arrangements with CIJE that will be involved and worry some about that coordination piece and the time that it may take. Sometime soon, we should probably deal with this and other loose ends.

I will be in my office most of tomorrow, Monday, November 11, if you want to talk. You can phone me at 617-234-4353, my direct line, and leave a voice mail about a good time before 5:00pm if you would like to talk.

Please give copies of this to Karen and to Gail. Thanks.

212-532-2360 X425

(X)

Proposal to Develop and Implement
an Evaluation Institute
for Jewish Education

Barbara Neufeld
Education Matters, Inc.
November 7, 1996

Conceptualizing a Role for Evaluation in Jewish Education

Research and evaluation designed to address questions of purpose, practice and outcome in Jewish education can create the capacity within Jewish schools, agencies, and communities to 1) collect, analyze and use systematic data to inform program development, and, 2) use such information to assess and improve educational impact in light of articulated goals. Therefore, it is with great enthusiasm that Education Matters, Inc. submits a proposal to develop an evaluation institute focused on these goals.

To accomplish its goals, the evaluation institute must establish **inquiry and data use** as integral parts of Jewish education and decision making. With this in mind, we believe that the evaluation institute will have as its initial task the development of a constituency for its services. It will have to create a desire for data and evidence that collecting and using such data is a) feasible, and b) more positive than negative in its impact. We propose a strategy for the initial 18 months of the institute designed to accomplish this task.

Strategy for the Initial Phase of the Institute

Before we present our design for the initial phase of the institute, we want to lay out our assumptions about the current conditions of Jewish organizations with respect to their likely interest in evaluation information.

First, we understand that significant numbers of educators, lay leaders and funders feel unsure about what is "working" with respect to their long and short-term educational goals. They may know, for example, whether students like or dislike a program, but this information does not tell them about the extent to which or for whom the program is achieving its goals. Jewish educators are not alone in this concern; those involved in general education are often puzzled about the impact of their own programs and practices.

Second, without information about the connections between programs, practices and outcomes, educators, lay leaders and funders have difficulty setting priorities, making decisions, and developing arguments with which to convince each other and constituents about their programmatic choices. They have difficulty answering at least three questions:

- ◆ How do we know whether, to what extent, and for whom our programs are working?



- ◆ How do we decide which programs/practices can be improved and which should be terminated?
- ◆ How do we decide what is worth funding?

Information generated from systematic program evaluation can provide information about the first of these questions. With that information, all interested parties can be in a better position to make informed decisions with regard to the second and third questions.

The difficulty in getting to the point of having and using information derives from traditional meanings/experiences associated with the term evaluation. For many, the term is synonymous with compliance and accountability and conjures up feelings of fear. Certainly, evaluation information can and should be used for such purposes. However, in proposing the establishment of an evaluation institute we are proposing a strategy that will enable educators, lay leaders and funders to value multiple uses of data.

We propose an evaluation institute that works to transform the culture of Jewish educators, lay leaders and funders into one that values learning from research; Jewish education that educates and is educated in the process of educating so that it can alter, expand or terminate programs and practices as necessary. The result should be Jewish education that is more effective in accomplishing the goals of those who fund and provide it.

Creating this learning enterprise may seem like a long route to a desired goal. One might ask, why not just let educators and lay leaders know that along with the funding for new programs will come an evaluation component? This would be simpler than creating the kind of inquiring community of educators that we propose. But, we argue, it will not expand the capacity of the Jewish education community to improve its programs because it will be an outside requirement rather than an educational strategy integral to educators' work.

What we propose is to bring those who provide education into the evaluation forefront so that they, as well as lay leaders and funders have a great stake in garnering information about their programs and making changes that will most likely lead to their improvement. We propose to do this by providing participants in the institute with the opportunity to a) use evaluation techniques to answer questions that they want to answer, and b) learn how to appropriately use evaluation findings to make decisions about programs and practices.

(Should we say something here to the effect that the Institute will be run out of Education Matters, Inc., but that it will be done with the collaboration and in-kind support (of human/financial resources) of the CIJE? Or, should the proposal be for an entirely free-standing enterprise? In either case, we need to build in some evaluation of the institute itself by the some credible agency, perhaps.)

NOTE NEW TEXT HERE: Done in bold.

Our strategy is two-pronged. First, we want to identify participants who are ready to



learn about evaluation and anticipate some benefit from the effort. Such individuals might come from the Lead Communities and from others that are participating in, for example, the Teacher Educator Institute. Involving participants who are already making changes in professional development or other aspects of their educational programs makes it likely that they will be able to develop evaluation questions they would like to answer with data. Such participants will likely also understand the developmental aspect of the evaluation institute and have an interest in shaping its work to be useful to participants. Finally, assuming positive outcomes from the institute, participants will have learned a great deal about evaluation and they will be able to serve as spokespersons for the benefits of evaluation and the evaluation institute for Jewish education.

Second, we want to identify individuals currently knowledgeable about evaluation but but relatively uninvolved in conducting evaluations in Jewish Education. These individuals, who we will call Evaluation Associates, will participate in a training program provided by the Institute and they will serve as evaluation support for the initial participants both during the Institute's workshops and between Institute workshops when participants are collecting their data.

In describing the Institute's planned workshops for Year I, we will talk about these two prongs one at a time. However, we stress that they are integrated from the outset and each serve to support the development of the other.

At the outset of the evaluation institute's work, we intend to create and then call a meeting of an Advisory Board to help design the initial program offerings in line with the ideas presented in this proposal. Prior to the advice of such a board, we suggest the following set of activities for the initial institute endeavors.

Focus #1: The Communal Participants.

1. We will develop some written materials about the Institute, its staff, and its initial purposes and distribute these to sites we wish to attract to the first series of workshops. These written materials will also describe the location, cost structure and dates of the workshops. We will identify between four and six communities that have an interest in participating in an evaluation institute seminar. Interest can rest at the community level and/or the individual institution level. Then we will obtain that community's commitment to send/fund a team of appropriate representatives (teachers, principals, lay leaders, for example) to a two or three day evaluation institute seminar where team members will learn the basics of evaluation as an enterprise. We will also obtain a commitment from a sample of funders connected with the attending site to attend the initial institute.

2. Next, we will send an evaluation institute representative to the community to help it generate a question or questions that it would like to address with data generated through evaluation. One of the important outcomes of this phase of the institute's work will be helping Jewish educators understand the kinds of questions that can and cannot be answered



with data, the kinds of questions that require multi-year studies, and those that can generate more immediate, usable information. For the purposes of the first institute seminar, we will help sites formulate questions for which they can develop evaluation strategies and collect data within a three to five month period.

3. With the support of the Advisory Board and in consultation with staff selected to conduct the first series of Evaluation Institute workshops, we will develop a curriculum for each of the workshops. Curriculum will focus on the dimensions and uses of evaluation as an introduction to the series of workshops, and it will include a series of structured activities designed to enable communal participants to develop a data collection strategy with which to answer their evaluation questions. Curriculum will be developed for the series of three workshops with the understanding that later sessions may be revised in light of participants' and Institute staff's experience with the early workshops.

4. The initial institute sessions will focus on evaluation as an enterprise designed to develop inquiry skills that can be used for improving programs and for making decisions about program impact and continuation. We will spend some time during these sessions considering the potential and limitations of using evaluation data for program and policy decisions. Our point in this discussion is that data, by itself, rarely is sufficient for making educational decisions. For example, data that demonstrate that a well-loved, well-implemented afterschool program has no measurable impact on Jewish identity or ritual practice after bar/bat mitzvah would not, by itself, suggest that the program ought to be terminated. Such information would have to be considered as part of a constellation of factors that might include a) whether the program could be improved, b) whether it might be continued as part of a long-term strategy to implement a more intensive program, or c) whether the funder was interested in funding it regardless of data-based outcome information. In contrast, data that demonstrate great program impact might be used to garner additional funds and it might provide useful information for other settings looking for information on what might be called "best practices."

4. A second, major component of the initial institute seminar would involve participants in designing a small scale evaluation to address the questions they brought with them. This work will be facilitated by the institute staff. (We anticipate including three staff members in this work, each of whom has expertise in a different area of data collection: perhaps, survey design, qualitative methods, and quantitative methods.) Participants will leave the institute with a data collection strategy. They will understand that they have the capacity to inquire, to ask systematic questions and gain information that will help them in their work. They will understand that although "outside experts" often do evaluation and can be necessary and helpful, "insiders" also have the capacity to design and implement evaluations that provide useful and valid information. They will leave with the idea that evaluation can be helpful in on-going program work as well as effective in identifying program impacts.

5. During the next three to four months participants will collect data according to their

evaluation designs and strategies. We anticipate that they will need assistance during this process as new issues arise and their knowledge and skill seems insufficient to their tasks. Therefore, we propose to provide the sites with access to the evaluation staff who were facilitating the initial institute and helped the participants design their initial studies. We do not intend to provide on-site help to participants; telephone conversations and staff's reviews of data collection instruments, for example, should be sufficient.

6. After the three or four months have elapsed, participants will return to a second working session of the institute. During this session, they will learn how to analyze their data and use it to draw conclusions. We do not anticipate that all of the evaluations will be sufficient to draw meaningful conclusions. After all, the participants will be learning a new set of skills. However, given the support provided during the design and data collection phases, we anticipate that all sites will have enough data with which to address their initial questions. Some sites will have trustworthy data with which to address their questions; others might understand how they could have improved their evaluation work. Both kinds of findings will be valuable for the purposes of the institute's work. This session of the institute will take the participants from their findings to the process of drawing implications from them. This, of course, is the ultimate purpose of collecting the data and we will explore fully the issues involved in using data to draw conclusions and make decisions. We will ask participants to return home and report to key constituents on their findings and their knowledge of evaluation.

7. To conclude this first series of workshops, we propose to convene a third meeting of the participants and the lay leaders and funders from the sites to share the experiences and outcomes of the work and to further elaborate and clarify the potential role of evaluation in Jewish education. At this time, we will also ask for feedback on the form and substance of the institute's work. This feedback will inform the content and design of the next cycle of the Institute's workshops

Next Steps. After completing the first cycle of workshops, we anticipate implementing two more cycles with additional cohorts of participants. Participants might include a second team from the same cities that were involved in the first cycle, however, we would also like to increase the number of communities involved in the institute's work.

It is also possible that participants from the first cycle will want additional support in continuing to conduct local inquiries into their work. If that is the case, we anticipate providing them with the opportunity to hire the Evaluation Institute Associates. Institute senior staff would provide support to the Associates in this role.

Review of Desired Outcomes from the Institute's Seminars. First, we want practitioners to realize that they can be inquirers and can produce valid information that will help them with their work. We want them to understand that evaluation does not have to generate only fear; but that it can inform their work and improve it. **Overall, we want to create a community of inquiry at the local level that includes funders, lay leaders, teachers (and anyone else**



who should be named here?) Second, we want participants to realize that they can understand evaluation as an enterprise. It does not have to remain something frightening and incomprehensible that will be "done" to them by outside experts. We do not see participants taking full responsibility for all of the evaluations they might need; we see them involving so-called outside experts. What we hope is that their work with the institute will enable them to understand what they want from an evaluator and to feel that they can provide sensible input into the design of work that they may fund. Third, we want participants to develop inquiry as a habit of mind, as an on-going part of their daily work. Fourth, we want lay leaders and funders also to understand the multiple roles of evaluation and to see it as more than an accountability device. Finally, we would like these sites to encourage others to participate in the institute and value evaluation as a component of program design, development and assessment.

Focus #2: Developing Professional Capacity - Evaluation Associates

We propose to begin the development of an evaluation capacity in Jewish education by creating knowledge, skill and a desire for evaluation information. If we are successful, as evaluation becomes integral to Jewish education, we assume that those providing educational programs will not have the time, skill, and/or inclination to add full-fledged evaluation to their daily work. Therefore, we will need a cadre of skilled evaluators interested in working in this arena. To fulfill this need, we propose that the evaluation institute work from its inception to develop expert evaluators for Jewish education. This focus will involve the institute in three distinct activities that will take place concurrently with the institute's initial and subsequent seminars.

First, with the assistance of an advisory board to the institute, we will identify individuals who are currently skilled in program evaluation methods and determine their interest in focusing some of their time on issues of Jewish education. (We are assuming here that the pool of researchers currently focusing on issues of Jewish education is insufficient to what we hope will be a growing demand. However, some of the people we identify might already spend a portion of their time engaged in research, albeit not evaluation, focused on Jewish education.)

Second, with the assistance of the Advisory Board, we will develop and implement for these individuals a training program that focuses on the special issues associated with evaluating Jewish education. Included in this training will be necessary information about Jewish culture, ritual, denominational distinctions, organizational arrangements, and educational program goals, for example. **The first of these workshops will take place prior to the initial workshop of the series focused on communal participants. (Was anything like this done for TEI? If not, we need to select a person or two to meet with these Evaluation Associates and provide them with readings and a seminar for the better part of the day on what they might need to know.)** This initial workshop will also describe the overview of the Institute's work, the objectives and strategies for the first



cycle of three workshops, and the Associate's role in the workshops and follow-up support work for the participants.

Third, we will involve these **Associates** at the Institute's **workshops**. They will serve as assistants to the core staff, and they will, with supervision, assist the sites with the implementation of their evaluation studies. The advantage to this approach is that it will support evaluation capacity development at the sites and in the developing cadre of evaluators for Jewish education. We anticipate that these **Associates** will take a more significant role in the implementation of the proposed second and third cohorts. **We intend for them to become part of a growing infrastructure for the Evaluation Institute.**

Developing a Continuing Role for the Institute

We envision continuing these two foci -- #1 training communal participants, and #2 training Evaluation Associates -- for several cohorts of participants. During this process, we will assess the demand and effectiveness of this approach and make adjustments accordingly.

In addition, as the infrastructure of the Institute grows, we suggest that the Institute take on additional activities. For example, it might, (Note some new format here)

- ◆ design some cross-site studies on key issues pertinent to issues of Jewish learning, identity and continuity -- several evaluation studies with a common design implemented in different settings.
- ◆ develop an advanced Institute seminar for those at schools or agencies who want more advanced skills for themselves.
- ◆ monitor the use and usefulness and impact of using evaluation data in decision making in Jewish education.

Ideas About Staffing the Institute

We know that staffing the Institute will be critical to its initial and on-going success. Therefore, one of its early tasks will be the identification and recruitment of core training staff. Our initial plans calls for involving some of the individuals who were at the Professor's seminar in Jerusalem who are knowledgeable. These include Ellen Goldring, Adam Gamoran, Barbara Schneider, Fran Jacobs. These individuals would bring a breadth and depth of experience to the enterprise.

We will also have to identify our Advisory Board. At this point, we might include people from the Hornstein Center such as Susan Shevitz and Amy Sales, key people in some of the day schools, and so forth. (Any other suggestions?)



Initial Cost Figures

Attached is a revised budget. It now lists, I hope, key items that will cost money!

First, here is a list of tasks that will have to be completed.

- ◆ **Select Advisory Board**
- ◆ **Meet with Board to get help with selecting sites, evaluation associates, core staff and curriculum for first cycle of workshops. Discussion will include the fee structure for communal participants as well as scholarship support for Evaluation Associates**
- ◆ **Recruit Evaluation Associates and core staff for first cycle of workshops**
- ◆ **With core staff, plan and implement a two day training workshop for the Evaluation Associates -- to be held either in Cambridge or in NYC**
- ◆ **Visit potential participant communities to select participants and assist them in developing their evaluation questions**
- ◆ **Finalize curriculum for the series of three communal participants' workshops. Assume that the first workshop lasts 3 days, the second 2 days, and the third 1 day.**
- ◆ **Implement the series of workshops for communal participants**
- ◆ **Keep Evaluation Associates at the workshop site for another day for feedback, debriefing and discussion of additional training needs for them and for the communal participants. Develop a plan and timetable for providing support to the communal participants as they collect their evaluation data.**
- ◆ **Provide support to communal participants**
- ◆ **Meet with Advisory Board for feedback on Workshop #1 and advice about on-going work**
- ◆ **Refine plan and Curriculum for second workshop**
- ◆ **Implement second and third workshops**
- ◆ **Review the entire cycle one activities for purposes of evaluation and revision.**
- ◆ **Conduct cycle two and three in the next two years**
- ◆ **Plan for continuing Institute work as suggested above.**



TRAVEL COSTS

NOT SURE HOW TO COMPUTE W/O KNOWING SITE
LOCATIONS OR LOCATIONS FOR WORKSHOPS

SHOULD INCLUDE

AIR TRANSPORT

GROUND "

HOTEL + FOOD

FOR ADVISORS, CORE EVAL STAFF,
EVALUATION ASSOCIATES, TO +
FROM WORKSHOPS + ADVISORY MTGS.
PERHAPS ONE ADVISOR SHOULD
ATTEND WORKSHOPS

CONFERENCE SPACE FOR WORKSHOPS

YEARS II + III

ADD 5% each year to Newfeld, Secy -
consultant salary - (Do consultants
stay ^{at} the same fee at CITE?)

Date: Wed, 04 Jun 1997 15:44:11 -0400 (EDT)
From: neufelba@HUGSE1.HARVARD.EDU
Subject: Suggestions Needed
To: Sarah <SFeinberg@compuserve.com>
Cc: Deborah Ball <dball@umich.edu>, Karen Barth <104440.2474@compuserve.com>, Gail Dorph <73321.1217@compuserve.com>, Sharon Feiman-Nemser <snemser@ibm.cl.msu.edu>, Bill Firestone <wilfires@rci.Rutgers.EDU>, Adam Gamoran <gamoran@ssc.wisc.edu>, Ellen Goldring <goldrieb@ctrvax.vanderbilt.edu>, Alan Hoffmann <73321.1220@compuserve.com>, Barry Holtz <73321.1221@compuserve.com>, Francine Jacobs <fjacobs@emerald.tufts.edu>, Deborah Kerdeman <kerdeman@u.washington.edu>, Gil Noam <noamgi@HUGSE1.HARVARD.EDU>, Danny Pekarsky <danpek@macc.wisc.edu>, Nessa Rapoport <74671.3370@compuserve.com>, Anna Richert <annaer@aol.com>, Barbara Schneider <schneidr@norcmail.uchicago.edu>, Susan Stodolsky <sue@cicero.spc.uchicago.edu>, Sam Wineburg <wineburg@u.washington.edu>, Ken Zeichner <zeichner@facstaff.wisc.edu>, Marvin Hoffman <hoff@cicero.spc.uchicago.edu>, Dan Chazen <dchazen@msu.edu>, Pam Grossman <grossman@u.washington.edu>, Karen Jacobson <KJCIJE@aol.com>

Hi to all of you,

One of the first tasks of the planning year grant that I have from CIJE is to create an advisory board or group that can help me develop a feasibility study and market analysis concerning the potential audience for an evaluation institute. In simply English, we want to learn whether and to what extent there are likely to be paying customers for an evaluation institute. If there are such customers, then we want to figure out what we would teach them over what period of time and at what cost to them and to whoever might help support the institute. I am assuming that tuition might not fully cover the expenses, but who knows. Another task, assuming that we think we should go ahead with the enterprise, would be to identify individuals who might be trained to do evaluations in Jewish education and individuals who would be the faculty of the institute.

Does this sound like fun? Does it sound inviting? If so, offer me some suggestions for members of the advisory board. You all can participate, of course, but I want people for this formal board from outside our establishment. Also, to narrow the parameters a bit, Karen Barth and I agreed that it made sense to create a board that was "close to home" -- my home in Boston, that is. This will increase my access to these folks and reduce travel costs for meetings. Susan Shevitz of the Hornstein Center at Brandeis has agreed to be on the board. I have approached no one else although I am thinking of Adrienne Bank from LA even though she isn't close to home. She knows a bunch of folks who I don't know and she works in the field of evaluation of Jewish education.

Thanks for any help you can provide. I hope to contact potential advisors before our meeting at the end of the month and give you an update on progress at that time.

Barbara