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[American Jewish Archives](http://AmericanJewishArchives.org) website.

TO: Mandel Foundation Colleagues
FROM: DP
RE: Mordecai Nisan's piece.

So I got a little carried away. After creating a first document, intended to be a blow-by-blow summary (See Section II), I decided to try my hand at a more focused account that identifies what seemed to me to be the really critical points (See Section I). As it turns out, the two documents overlap substantially. My suggestion is to read Section I. as the basis for our conversation (thi being preferable to my making a lengthy initial presentation); if you're interested, look at Section II which, though it substantially overlaps Section I, contains some additional points as well.

I I suggest that at the beginning our meeting, we take a few minutes to review SectionI, and then launch immediately into our discussion, making use of the questions I articulated if they seem pertinent. Looking forward to our conversation!

SECTION I: ESSENTIAL ELEMENTS OF NISAN'S POSITION

RECONSTRUCTING MORDECAI NISAN'S ARGUMENT

Introductory. Having read and re-read Mordecai Nisan's article on leadership development, I stepped back and asked myself what were its essential claims. At the price of some simplification, here is his position as I understand it.

1. Inadequacy of the dominant "training/instrumental" conception of leadership

development. The conventional approach to leadership development seeks to inculcate a variety of tools (e.g., skills and abilities) that will serve the future leader across a variety of different roles. This conception assumes the possibility of transfer of learned basic skills from one leadership role to another. This view is appealing, first, because we live in a society in which people change roles frequently, a circumstance which makes us hunger for an approach to leadership-development that will allow us to function as leaders across a variety of different kinds of roles. Second, the view is appealing because it assumes that we can develop leaders without dealing with difficult questions concerning the aims of the leader's work; in a liberal society that often operates on the assumption that questions of aims and values are "personal" and not subject to intervention, an approach to training that does not tamper with our aims and values and focuses exclusively on the acquisition of a tool-box that can be used no matter what one's aims is attractive.¹

Unfortunately, this model is fundamentally flawed in several respects.

A. This view assumes not just that we can identify the essential tools that the leader needs to function effectively across a variety of leadership-contexts, but that we know how to teach these skills effectively, i.e., in such a way that the requisite transfer is likely.

B. More deeply, it is fundamentally wrong-headed to suggest that it is possible to focus on means to the exclusion of aims. The means at our disposal profoundly and decisively affect our choice among different possible aims, our interpretation of these aims, and the way we try to achieve these aims. Moreover, there are fundamental incompatibilities between certain aims and certain kinds of means. These considerations suggest that it is fundamentally wrong-headed to believe that it is possible to inculcate tools of leadership in ways that don't have profound implications for the aims that future leaders adopt and the way they understand these aims.

C. The conventional model falsely assumes that aims need not be attended to systematically

¹ Note that though most of Nisan's account is consistent with the view just articulated (that the dominant approach to training focuses on tools in isolation from aims), there is a least one passage at the very beginning of the essay which suggests that the dominant model does not ignore aims altogether. Describing the dominant "training conception" on p. 11, he writes that "This approach maintains that good leaders are individuals who are capable of achieving the aims expected of them... These aims are perceived as given and known, and therefore as facilitating clarification... of the means required to achieve them and hence the tools with which the leader should be equipped." While this passage suggests that attention to aims is pertinent to leadership development, virtually all other passages are consistent with the interpretation of the training-model (as neutral with respect to aims) described in the main body of the text.

because most of us, and, in particular, aspiring and actual leaders, have clear aims. On the contrary, the so-called aims that leaders (and others) typically have are preferences or aspirations that have not been subjected to critical examination with attention to their rationale, interpretation, and implications; they exist as vague aspirations, [often poorly, if at all, connected to practice].

2. **The importance of clarity concerning aims.** Effectiveness as an educational leader requires clarity concerning one's aims, indeed a comprehensive conception of aims and values with respect to one's educational work, along with the ability to apply these aims appropriately across a range of different circumstances. An educational decision is "autonomous" when it is informed by this kind of a comprehensive conception, as opposed to its being determined exclusively by such things as outside pressures or self-interest. The requisite clarity concerning aims that the educator needs arises primarily out of serious, rational inquiry that involves:

- A. becoming increasingly aware of a significant range of possible aims, along with multiple interpretations of these aims;
- B. understanding and systematically examining the rationales for these various aims;
- C. understanding the behavioral manifestations associated with realization of these aims, and the costs (say, for other aims) of achieving any one of them;
- D. thoughtful selection from among this array of aims and prioritization.

3. **The insufficiency of aims-clarity; the need for "commitment" (or "educational identity").** While clarity concerning aims is indispensable for an educational leader, it is insufficient for the exercise of effective leadership. It is also essential that the leader be committed to the aims in question, that they engage him/her not just cognitively but also emotionally. Put differently, these aims need to be constitutive of his/her fundamental identity as an educator - what N. describes under the rubric of "educational identity". For more on the concept of identity, see #4.

4. N. draws a distinction between the individual's personal identity and his/her educational identity. "Personal identity" refers to the agent's self-definition, one's understanding of what is central or essential to "who one is", to one's being. Personal identity includes our conception of the good and a commitment to a way of life. While our behavior is sometimes driven by other kinds of motivations (e.g., to maximize utility, to meet biological needs), much of our behavior is best accounted for as "identity-derived"; it is motivated by the desire to be and express who we believe we fundamentally are.

An educational leader's educational identity is an element in his/her personal identity: "The educational mission constitutes an important value in their lives and in their personal identities, and their conception of the good forms part of their identity as educators (p. 34)."²

² There may be some tension between this account of the relationship between personal and educational identity (an account which suggests that they are organically inter-related) and the account offered on p. 39, where N. points to possible tensions between one's personal and one's

5. As noted in #3, N. believes that awareness of aims (even if accompanied by rules that purport to explain how they are to be applied and prioritized in particular situations) is insufficient for effective leadership; the interiorization of these aims as part of one's identity as an educator and a person is fundamentally important. The reason that having a set of aims, accompanied by rules for applying or translating them in concrete situations, is insufficient is twofold:

- a. No set of rules for applying aims will cover the varied conditions under which educators operate.
- b. Actual commitment to a set of aims -- embodying these aims as a person -- affects the quality of one's efforts as an educator or educational leader. It is discernible in one's practice.

6. There is a danger that commitment to a discrete set of aims will give rise to a narrow and possibly fanatical approach to education. The best way to guard against this possibility is to cultivate openness, tolerance, and respect for other ways of thinking and being, even as one helps students to become educational leaders with a clear set of educational commitments

* 7. The development of educational identity as interpreted above should be a central aim of a program designed to develop educational leaders. Indeed, Nisan suggests that those accepted into such a program need to view themselves as working towards the development of an educational identity. The suggestion seems to be that those who are incapable of viewing themselves as embarked on such a journey would be poor candidates for this kind of a program. While various modalities (including the arts) may prove powerful vehicle of stimulating depth and clarity concerning aims, pride of place must go to approaches that emphasize carefully reasoned and articulated thinking -- especially since educational leaders will need to employ such tools with various constituencies in their work.

The various elements in the leadership development program need to be constructed in such a way that they will contribute to the development of educational identity. Nisan believes that, because of the intimate relationship between identity and behavior, practical experience in the field of a kind that is demanding and engaging, and that calls on the full repertoire of the individual's talents and values in the effort to address significant challenges, has the power to contribute richly to the development of educational identity.

8. Although Nisan's discussion emphasizes the identity-conception of educational leadership

educational identity. In the latter context, he writes that "the distinction between personal identity and educational identity is similar in its essence to the distinction that we must all make between our personal point of view, which is the springboard for our behavior, and an 'external' point of view, which imposes limits on us;" and he adds that "educational identity is geared towards ensuring that the best conditions of educational practice will be met even when it is not entirely compatible with the educator's 'conception of the good.'"

programs and critiques the dominant model that focuses on the development of skills/tools, he stresses, near the end of his discussion, that there is much to learn from the more "instrumental" approach, at least so long as it does not dominate our understanding of what it means to cultivate leadership.

Concluding comment. At the heart of Nisan's position, as I understand it, is the belief that an indispensable condition of effective leadership is the possession of a deep understanding of what one is fundamentally about and after as an educator, an understanding (and set of commitments) that is the product of a serious examination of possible aims, with attention to their rationales, costs, implications, and relative importance. Through a process that involves a) the encounter with a range of powerful perspectives, b) systematic, multi-faceted systematic, intensive reflection concerning these perspectives, and c) the opportunity to test and deepen one's views through carefully designed practical experiences in field-settings, suitable candidates will develop a rich conception of the nature and aims of the educational process that will infuse their very sense of who they are as educators and as human beings. Such clarity and depth of commitment will guide them more effectively in their work as educators than will a set of principles about how to educate or how to apply aims in living educational circumstances.

In a way that I hadn't anticipated, Nisan's position reminds me of Parker Palmer's view that we teach who we are, that what we do as educators inevitably reflects our fundamental understandings and commitments. The development of our identity as persons and educators therefore needs to be at the heart of the process of educator-development, be it teachers or educational leaders. Although Palmer and Nisan would probably understand what it means to have an educational identity and the process through which we acquire such an identity in very different ways, both would prefer an approach that emphasizes identity to one that focuses on "tools and means".³

SOME QUESTIONS FOR DISCUSSION

1. What points in the account of Nisan's views offered above are in need of clarification?
2. Are there significant points in his essay that are misrepresented or unduly simplified in this exposition?
3. What points in his analysis seem powerful, and/or provocative, and/or bewildering, and/or doubtful, and/or in need of further defense or discussion?
4. A few more specific questions:

³ Though not worth developing on this occasion, it may be useful to note that Michael Polanyi's discussion of apprenticeship models also emphasizes the acquisition of skill that is not reducible to acquiring an explicit set of rules and techniques for doing things. His approach to leadership development, though, might be very different than any of those we've been considering.

- a. Is Nisan right in suggesting the central importance of the concept of educational identity as indispensable to educational leadership? How does he believe the possession of such an identity will enhance the leader's effectiveness -- and is he right about this? What problems, if any, does the acquisition of educational identity in Nisan's sense address and/or fail to address adequately?
- b. Is Nisan right in his suggestion that a leadership development program of the kind he imagines has the capacity to build educational identity in aspiring leaders? With what kind of individuals is such a program likely to be effective?
- c. If, as Nisan implies, there are things to be learned from both the dominant "training-model" and from "the identity conception", can one develop a conceptualization of leadership and of leadership development that does justice to both of them?

SECTION II: A MORE EXTENSIVE BLOW-BY-BLOWY PRECIS OF NISAN'S ESSAY

MORDECAI NISAN'S ARTICLE ON EDUCATIONAL LEADERSHIP

Part 1 of the essay. In this section, Nisan characterizes and critiques what he calls the instrumental approach to leadership-development and begins to make the case for the importance of focusing leadership-development efforts on questions of **aims**.

1. He characterizes the instrumental/training conception as one focused on the acquisition of tools

(skills, abilities, and other traits), which can then be deployed across a variety of contexts. The conception assumes a) the possibility of sharply distinguishing means and ends, and b) the possibility of transfer of learning across leadership contexts.

2. This approach is appealing in a society in which people change professional (leadership) roles frequently, for it suggests that they don't need to re-tool each time. It is also appealing in the context of Liberal philosophy's reluctance to interfere with people's aims; the idea of giving them tools that can be applied in a variety of contexts in the service of aims they themselves select feels safer than tampering with their aims.

3. Nisan notes two preliminary difficulties with this training-conception, even if (as he does not) we accept its basic assumptions: a) that it is possible to identify the requisite tools that go into being a leader, and b) that we know how to effectively teach these tools.

4. Whereas the training-view assumes that people, educators included, have clear aims and that we shouldn't be dealing with such matters in educational leadership development programs, in fact, the aims that people, including leaders, have are typically seriously inadequate.

a. They are often so vague as to be meaningless and not accompanied by any sense of which among their various interpretations the agent identifies with; and there is lack of clarity concerning what the world might look like if these aims were achieved.

b. The aims we identify as our own are typically but a small sub-set of the range of aims that we might, were lucid and reflective, adopt.

c. Our aims lack the kind of distinctness that would give them depth and inspire commitment.

5. Contrary to the training-conception means and ends are not independent and unlinked.

a. We typically restrict ourselves to aims that we believe we have the means to achieve.

b. We interpret our aims in ways that are influenced by the means at our disposal.

c. Some aims are incompatible with some means. For example, the rational planning model is irreconcilable with aims like "kindness" or "generosity"; and one cannot educate towards independence through "conditioning".

d. More generally, the means available to us profoundly affect the aims that will guide our behavior. Indeed, in our own world that rise of "the rational model of behavior and planning" has dramatically changed the aims we strive for and their definition; we have a decided preference for what is readily measurable.

e. He notes that his account of the relation between means and aims is not intended as exhaustive. As an example, he notes that aims can themselves become means, i.e. tools that

we use to understand the present and evaluate available options.

The main point is this: we need to abandon the false idea that it is possible to inculcate tools or means in ways that do not profoundly influence the aims that the student will adopt and the way he/she will understand these aims.

6. It is critically important to enrich the range of aims that people (including educational leaders) set themselves, with attention to their intelligent and varied employment under different sets of concrete circumstances. N. identifies the possession of “a broad, fully clarified, deep picture of aims” with understanding each one, alone and in relation to the others (with attention to their relative priority and to the effects of implementing one on the others, etc.) He connects having this picture with “realizing one’s potential and with “effective fulfillment of varied leadership roles.”

7. Though N. has spoken of a “fully clear” picture of aims, he goes on to add that the process of understanding an aim has no definite limits; the net of meaning that informs our grasp of an aim can be infinitely expanded. The educator’s challenge is to develop a net of meaning that is sufficiently complex to make reasoned decisions possible.

8. N. stresses that aims are not for him (as they are in the instrumental, training-conception) the preferred states-of-affairs to be achieved that inform the leader’s work. Aims in the proper sense are beliefs/values that are grounded in a careful rational examination that is concerned with the worthiness of the aspiration in question. The inquiry that gives rise to aims in this full sense is comprehensive in nature. It involves:

a. Identifying worthy aims out of an expansive range of possibilities.

b. Prioritization of selected aims based on rational deliberation.

c. Awareness of behavior expression of each and the implications of pursuing it for other possible aims in varied local settings.

9. N. notes that there are modes other than the philosophical for becoming reflective about aims and encourages making use of them; but he adds that philosophical/analytic tools cannot, especially for the educator, dispensable. The latter is especially true for educational leaders, whose job include communicating and defending aims in relation to different constituencies.

10. N. Concludes this section by urging that to deal with aims is to deal with **content**. He seems to mean that “aims and values, including the considerations that underlie their selection” just are content; and he distinguishes content in this sense from “principles and means” which serve content but are no substitute for it.

11. Finally, he notes that his argument is not intended to rule out attention to tools and instruments of the kind we associate we social science and technology. On the contrary, such tools can be enormously valuable, but it is essential that they not be allowed to define the nature of the enterprise -- in the way that, unfortunately, they have in the modern world.

SOME QUESTIONS RE: PART I OF NISAN'S ACCOUNT:

1. At the very beginning, on pp. 11 and 13, he appears to be inconsistent in his characterization of means and ends. Whereas on p. 11, he suggests that in the instrumental/training model, our aims may shape our understanding of means, on p. 13 and in the remainder of the essay, he identifies the training-model with the view that means/tools can be taught in isolation from any reflection concerning aims.
2. Nisan's characterization of Liberalism as totally disinterested in Aims seems more fitting as a critique of Libertarianism, a particular species of Liberalism.
3. Nisan's distinction between content, on the one hand, and principles/tools, on the other near the end of the section was confusing to me.
4. I was not entirely convinced by his discussion on p. 19 of the incompatibility of certain means and certain aims, e.g., the incompatibility of the rational model and aims like kindness or generosity.
5. On pp. 22-23 when he speaks about an inquiry into aims involving a sound knowledge of the range of aims available in the culture, including the criteria for choosing among them, I wasn't sure of the extent to which this was a sociological inquiry and/or a personal/existential inquiry.
6. There's a very Deweyan quality to much of Nisan's discussion of how to think about aims.

Part 2 of the essay: The Identity Conception.

1. The section begins with N.'s claim that, although awareness of aims is of essential importance, it is insufficient for effective educational leadership. The leader must also be deeply identified with, or committed to, these aims. N. characterizes as "identity" a conception of aims that fuses cognitive and emotional, personal and objective, and he urges that the cultivation of educational identity be a central aim of educational leadership development.
2. N. Draws a distinction between self-perception (which is descriptive only) and self-definition, which involves picking out those traits that are essential to one's understanding of oneself. The act of self-definition shapes our conduct inasmuch as we declare ourselves to be the kind of person who will act in certain ways. In this sense, "self-definition" has a prescriptive dimension. Our identity, as it emerges through self-definition, reflects features of who we are that we have voluntarily chosen, as well as features of our existence which have been thrust on us; but in the act of self-definition, there remains a choice concerning how to interpret, evaluate, and weigh those features of our situation that have been thrust upon us.
3. N. draws a distinction between identity-derived behavior and other forms of behavior. The latter includes behavior that is driven by biological needs and behavior informed by the desire to maximize utility. As distinct from the assumption of the "rational model of behavior" that holds that

all behavior aims to maximize utility (or individual satisfaction), the identity-conception holds that a significant amount of our conduct is identity-derived, i.e., it is informed by the desire to express our identity, i.e., who we are, even at the cost of sacrificing satisfaction or self-interest as ordinarily understood. "Loyalty to one's identity" figures prominently in many actions that may otherwise seem inexplicable. A special kind of satisfaction attaches to such actions.

4. Effective educational leadership requires that the educator must have a strong educational identity, i.e., he or she must be deeply committed (intellectually and emotionally) to a comprehensive conception of aims and values with respect to his/her educational work. The choices and activities that emerge from an educational leader must be the expression of this kind of an educational identity, rather than from some abstractly held set of aims guided by rules that declare how these aims are to be interpreted and applied.⁴

5. N. declares an educational decision "autonomous" when it is informed by the aforementioned educational identity, as opposed to being determined by outside pressures, personal self-interest, etc. Not that such matters are irrelevant, but they are to be viewed as elements among others; pride of place goes to one's educational identity and the conception of education associated with it. Such autonomy has been a feature of the most important educational thinkers we can identify.

6. Why become entangled with questions of educational identity? Isn't it enough to encourage future educational leaders to be aware of the range of possible aims and to acquire the rules for selecting among them under different circumstances? Says Nisan: the circumstances of educational leadership are so varied that there is no set of rules that can adequately guide the educational leader's efforts across them all. Secondly, it is essential that the educational leader's efforts and activities be **sincere**, for "education without sincerity is anti-education, manipulation, and misrepresentation." In a similar vein, N. urges that education not grounded in sincerity will not succeed in conveying its message effectively: "absence of commitment to the message will necessarily affect the ability to convey it effectively." Apparently, sincerity involves being deeply and personally committed to one's educational aims.

7. What is the relationship between personal and educational identity? I am not sure that N. is consistent on this matter. Initially, he says that educational identity encompasses "the educators' definition of themselves as educators: their commitment to education, the perception of its aims, and their own world view concerning their personal aims in this sphere." In contrast, personal identity refers to their conception of the good and their commitment to a way of life. Says N. (initially:), the two identities are tightly bound up in the act of education. "The educational mission constitutes an important value in their lives and in their personal identities and their conception of the good forms part of their identity as educators... The resulting fusion shows that the individual's conception of

⁴ Bizarrely, because it's hard to imagine that Nisan would be sympathetic to Parker Palmer, Mordecai Nisan's view bears affinity to that of Palmer, who says that "we teach who we are." Palmer's notion that the teacher's activities inevitably reflect his/her personal identity cohere with Nisan's basic idea.

education both shapes and is shaped by personal identity.

But later he suggests that there may be tensions, even contradictions, between personal and educational identity (see p. 39) "The distinction between personal identity and educational identity is similar in its essence to the distinction we must all make between our personal point of view, which is the springboard of our behavior, and an 'external' point of view, which imposes limits on us....Indeed, an important advantage of educational identity, as proposed here, is that it permits and actually demands 'detachment' from elements of personal identity, placing a kind of moratorium on personal commitments, such as the educator's political orientation.

9. N. is concerned with the possibility that commitment to a particular aim or set of aims will induce narrowness of a kind that may tend towards fanaticism. This danger is to be tamed, says Nisan, by an educational program that emphasizes the virtues of openness, tolerance, and respect for the autonomy of one's students. But he notes that this problem is serious and will require further clarification.

Opportunities for shaping educational identity. N. believes that practicum experiences can play a pivotal role in shaping the educational leader's educational identity, and he believes that such experiences need to be organized with an eye towards this important aspiration. If the practicum experience is to play this role, it is essential a) that it stimulate very strong personal involvement with the project at hand, such that the agent feels that he/she "can make a difference; b) that the experience draw on the range of the agent's abilities; and c) that the situation evoke a sense of mastery and responsibility. Also critical is that the experience take place in a social framework in which attention to the views and commitments of others is necessary. N. concludes by noting that independent/personal projects can and should also be shaped so as to maximize impact on educational identity.

N.'s concluding remarks. In this section, N. makes comments concerning vision which (late at night and a couple of Manhattan's under my belt) elude me. He concludes by discussing the educational identity of the institution that is focused on cultivating educational identity; and he makes a plea for declaring the aims or aspirations that inform the decisions that it has made concerning the education of future leaders. This, he urges, is essential if indoctrination is to be avoided.nb

National Jewish Diffusion Network Informants

Dr. Raymond Bloom, Jim Joseph Foundation
Dr. Ada Beth Cutler, Montclair State University
Dr. Barry Holtz, Jewish Theological Seminary
Dr. Betsy Dolgin Katz, Florence Melton Adult Mini-School
Jo Kay, Rodef Sholom Congregation and HUC-JIR, NY
Dr. Alisa Rubin Kurshan, UJA Federation of New York
Dr. Yossi Prager, Avi Chai Foundation
Dr. Joseph Reimer, Hornstein Program, Brandeis University
Dr. Jeffrey Schein, Cleveland College of Jewish Studies
Tova Shimon, Jewish Education Council of Montreal
Steve Freedman, Beth Shalom Congregation, Elkins Park, PA
Renee Frank Holtz, Congregation Kol Ami, White Plains, NY

Natl. models?

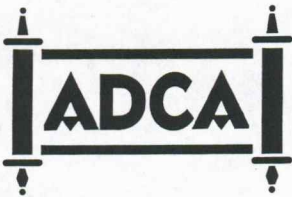
What's a program?

Relationship to institution.

Id. + validation + dissemination → personnel → Syn School
↓ ↓ ↓
how how how

Self-nominating?

Role of the site in
the replication



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Dr. Cecile B. Jordan

MEMO

TO: Diffusion Network Think Tank Participants

FROM: Jeffrey Lasday, Chairman,
National Jewish Diffusion Network Steering Committee

RE: June 6th Think Tank Meeting

Thank you very much for accepting the invitation to participate in the Diffusion Network Think Tank. I look forward to a very stimulating day as we discuss and shape the creation of a National Jewish Diffusion Network for Jewish Supplementary Schools in North America. For our invited key informants I am enclosing a copy of the original Diffusion Network proposal, along with a brief proposal synopsis. At this point we have decided that the Diffusion Network will initially focus on issues of lay and professional personnel.

The information gleaned from the Think Tank will be used to develop an action plan for funding and implementing the diffusion network. If you haven't already done so, please RSVP to Dr. Paul Flexner at JESNA (212) 284-6879 your anticipated arrival and departure time for the Think Tank. A short response form is enclosed for you to FAX to Paul at JESNA. I look forward to greeting you on June 6th.

Date, Time and Location

The National Jewish Diffusion Network Think Tank will take place on June 6th at the United Jewish Communities/JESNA office at 111 8th Avenue (between 15th and 16th streets) on the 11th floor from 12:00 noon until approximately 6:00 p.m.

Participants

Think Tank participants will include the Diffusion Network Steering Committee and key informants. The key informants have been selected from experienced Jewish educators, participants in successful educational replication projects, or professionals involved in providing grants for replication projects. A full listing of people scheduled to participate in the Think Tank is enclosed.

Think Tank Goal and Questions

Our goal for the day is to gather information from key informants that will assist in establishing a National Jewish Diffusion Network for Supplementary Schools in North America. To reach this goal we will focus on the following questions:

- ◆ What are the factors/variables that enable a diffusion network to be successful? What are the barriers to success?

- ◆ What successful dissemination projects already exist in Jewish education? What can we learn from these projects?
- ◆ With regards to learning from a particular project: What was the most difficult barrier to overcome? What are the prerequisite criteria for replication to be successful? What would you have done differently?
- ◆ How do we define success?

Schedule of the Day

11:00 a.m.	Steering Committee Meeting
12:00	Start of the Think Tank – Welcome and Lunch
12:30	Think Tank Overview - Jeffrey Lasday
12:45	Review of the National Diffusion Network Proposal – Dr. Chaim Botwinick
1:15	Discussion
2:00	The Florence Melton Adult Mini-school: Case Study of a Successfully Replicated Program – Dr. Betsy Katz
3:00	Discussion and Presentation of Successful Replication Projects
5:00	Review and Distillation of Information Gained from the Think Tank
6:00	Thank you and Farewell

For More Information

For more information concerning the Think Tank please contact:

Jeffrey Lasday	(314) 432-0020	e-mail: jasday@cajestl.org
Dr. Paul Flexner	(212) 284-6879	e-mail: flex@jesna.org

Enc.

ESTABLISHING A NATIONAL DIFFUSION NETWORK FOR JEWISH SUPPLEMENTARY SCHOOLS IN NORTH AMERICA

A Proposal for Central Agency Leadership in Partnership with the Denominational Movements and JESNA

I. BACKGROUND

Supplementary Jewish education - the normative form of Jewish schooling provided for over three generations to Jewish children after public school (or private school) hours is presently facing the most serious challenge in its history on the North American continent.

Increasingly over the last two decades - following the enrollment peak years of the 1960's and ensuing and ongoing dramatic decline - synagogue and community-based schooling has been on the communal agenda. Questions are continually being posed about the nature of this education, the quality of the program, its impact and effectiveness, the support it receives in the synagogue and community and its future.

Some of these questions have arisen as a result of the emergence of the Jewish day school as a local and national agenda item. While much discussion and debate has taken place about the problems and challenges of the Jewish supplementary school and about the need to strengthen it, little has been accomplished to change its capacity for greater effectiveness.

Although concerted efforts are currently underway to experiment with several venues, formats and curricula which aim to improve the quality of Jewish supplementary education, it is premature at this juncture to measure the potential impact of these initiatives, especially in the absence of rigorous evaluations. Nevertheless, anecdotal data and feedback suggest that certain programs and projects are beginning to have a significant impact.

A review of the recent literature and research clearly suggests that there is no magic "silver bullet" or single initiative that can resolve the multifaceted array of

problems and challenges supplementary schools currently face. Rather, what is suggested is a collaborative holistic approach for an extended period of time based on whole-school reform, research, and practices. These have renewed our basic conviction that supplementary school education can, in fact, be effective.

Central agencies for Jewish education and the denominational movements share a commitment to exploring ways to enhance the quality of supplementary school education on the local, regional, and national levels. One such avenue has been the recent dialogue between central agency directors and representatives of the denominational movements, convened by JESNA in June, 1998 which was attended by representatives from the Association of Directors of Central Agencies, JESNA staff, and representatives from the denominational movements. They have begun to explore the possibility of sponsoring joint projects which will focus on strategies for reinvigorating and "recreating" supplementary/synagogue schools. The purposes of the consultation were to: (1) review the relevant literature on Jewish supplementary schooling and current experiences; (2) provide an update of initiatives currently underway sponsored by denominational movements and central agencies; (3) identify basic working assumptions toward the eventual development of a comprehensive proposal for supplementary school improvement; (4) identify content areas for a proposal; and (5) engage in a brainstorming session which resulted in the development of an extensive list of proposed projects.

Five areas that the group focused upon were: (1) professional leadership development/personnel; (2) curricular innovation; (3) advocacy and marketing; (4) evaluation and dissemination; and (5) family education programming.

In an effort to consolidate these areas into a single funding initiative, the following proposal was developed, and if funded, has the potential to enhance dramatically the scope, quality, and content of Jewish education in North America.

Undergirding the success of this project will be the unswerving commitment on the part of central agencies to work in close collaborative partnership with JESNA and

the denominational movements on the national and local levels, as well as with local federations, and appropriate federation agencies.

II PROPOSED INITIATIVE

THE ESTABLISHMENT OF A NATIONAL DIFFUSION NETWORK FOR SUPPLEMENTARY SCHOOLS

Experience in funding Jewish education projects and initiatives, whether they be formal or informal in nature, has demonstrated that innovative projects developed by individual institutions generally respond to similar problems and challenges faced by other institutions.

By establishing an effective identification and dissemination network of such projects, supplementary schools seeking solutions to similar problems may avoid the excessive time, costs and effort entailed in "reinventing the wheel". Towards this end, a process of transferring of success models can be designed to foster the development and/or validation and dissemination of exemplary, innovative approaches to the solution of common Jewish educational challenges. Further, change becomes embedded when institutions engaged in similar innovative attempts can share information about their efforts, especially under the guidance of area experts.

In order to embark upon the design and implementation of a model of "transferring success", a National Jewish Diffusion Network (NJDN) would be established in order to develop and maintain a dissemination system that helps supplementary schools improve the quality of Jewish education by sharing successful education programs, products, and processes.

To support this dissemination system, the NJDN would encourage Jewish supplementary/syngagoue schools to strive for excellence by providing grants to four types of projects, all of which comprise the transferring of success model.

Ideally, to encourage these schools to develop creative and innovative programs, development grants would be awarded in conjunction with local agencies. Once the new programs are developed, their usefulness can be validated, demonstrated, and replicated. This transferring of success process is founded upon the premise that the success of a particular program must be identified and validated before it can be demonstrated for replication.

Description of Project Stages

The following are descriptions for each of the project stages which comprise the transferring success model.

- 1) Development of replicable, exemplary innovative programs/project;
- 2) Validation, or verification of the effectiveness of innovative programs that have been operational for a period of time, and claim to have achieved exemplary results.
- 3) Demonstration of successful techniques and practices of validated programs; and
- 4) Replication (adoption/adaption) of demonstration programs by supplementary schools with similar needs.

Description of Grant Categories

The following is a description of each grant category which the NJDN can fund over an extended period of time:

1) Developer Grants

Developer projects would be those initiatives which create promising new institutional models which have potential for adoption by other schools/communities. Developer funds are used to generate the design of highly effective practices which may: (1) motivate the development of innovative projects which can be incorporated into the regular institutional program; and/or (2) replace less effective practices in the regular program and be strengthened and expanded in succeeding years by institutional resources.

Developer assistance would be provided for a minimum of one to a maximum of a three year period, during which time data to assess the project's effectiveness in attaining stated objectives are collected. At the conclusion of this period, the program must be validated and, when validated, demonstrated for future replication.

2) Validation Grants

Validation funds could be used to document the validity of programs that have been developed. A program is validated, or considered exemplary, if it satisfies the following criteria:

- Evaluative data are available to substantiate claims of success in achieving stated objectives.
- The program is cost-effective; i.e., has reasonable costs for implementation and continued regular operation in institutions in which it originated.
- The program is transferrable to other institutions beyond the initial program model.

Validation processes might involve one or more stages: review of applications for validation, review of data submitted, and visits by validation teams to program sites. To judge the merit of a project, an application is critically read and evaluated by specialists who possess experience and expertise in the field(s) related to the project.

Where necessary, projects judged by evaluators to fulfill validation criteria enter the second stage of the process. This includes an on-site visit by a NJDN validating team to confirm the accuracy of statements made in the application regarding evaluative data and program operation. During the on-site visit, staff members are interviewed, project activities observed, and documents examined.

Once a validation process is successfully completed, a "Certificate of Validation" might be awarded by the NJDN. The certificate is an indication that the project is

not only exemplary, but that it is also worthy of dissemination to, and replication by other institutions.

A. Demonstration Grants

Demonstration funds may be used to demonstrate the potential utilization of a school's validated programs for other institutions. Among the activities to be funded for demonstration purposes could be:

1. Preparation of bulletins and flyers/marketing and communications strategies
2. Conducting awareness workshops to familiarize potential replicators with the program's goals, methods, and management procedures;
3. On-site consultations; and
4. Development of curriculum resource packets, teachers' manuals, and administrative guides.

Demonstration programs can continue as long as a clientele for replication exists, and there are funds to serve this goal.

B. Replication Grants

Replication grants may be awarded to institutions wishing to introduce successful innovative demonstration programs developed by other supplementary schools. Participating in the demonstration phase of a validated program that institutions desire to utilize is a requisite for replication grant eligibility.

Replication applications would include:

- the replicating institution's needs assessment;
- contact with the demonstrator;
- planned activities; and
- evaluation strategy

In order to ensure the effectiveness of transferring the success of a demonstration project, the needs assessment and evaluation strategy of the replicator and demonstrator must correspond.

Typical initial costs for replication include:

- organized activities;
- specialized instructional materials and equipment;
- expenses for travel to visit demonstration sites; and
- substitute time to release teachers to attend training sessions.

The types and respective amounts of initial costs are determined in consultation with the demonstrator.

Replication grants are for a two-to-three year period, depending on the nature of the program. In subsequent years, the program should continue with institutional resources.

What Makes This Funding Model Unique?

Projects disseminated by a National Jewish Diffusion Network are developed locally, and tried and field tested with students and teachers. Every project will have demonstrated its effectiveness. This means not only that the projects are effective at their development site, but also that they can be used successfully at other sites.

Projects funded by the NJDN would assist schools by providing training and consultation to those implementing the project at a new site. Follow-up assistance, additional training, on-site visits, and evaluation help will also be available. NJDN projects can be developed by consultants and administrators who provide implementation assistance to other teachers and administrators.

The transferring of success model through a National Jewish Diffusion Network must provide a more cost-effective way of improving the quality of supplementary education when compared to the costs of developing a new program tabula rasa. Moreover, the introduction of this model into funding modalities for Jewish education initiatives, perforce will encourage and motivate creative program

designs, new funding patterns and levels of accountability which rely heavily upon program effectiveness and transferrability/replication.

The National Diffusion Network will motivate and stimulate central agencies and the denominational movements to begin thinking creatively about ways in which to either introduce change and/or improve the quality of supplementary schooling.

Areas that should be targeted may include, but not be limited to:

- ▶ Family Education Programming
- ▶ Post Bar/Bat Mitzvah Program
- ▶ Arts Education
- ▶ Professional Teacher (In-Service) Training
- ▶ Mentorship Programs
- ▶ Adult Learning Models
- ▶ Specific Innovative Curricular Initiatives
- ▶ Community Models via School Clusters
- ▶ Informal Educational Programming

It would be at the discretion of the community to identify the nature and scope of the initiative — with the proviso that the initiative have some impact upon supplementary Jewish education.

In light of the ambitious nature of the proposed National Jewish Diffusion Network concept, the following are several points which further supports the need for such an initiative.

1. In order for supplementary schools to succeed, continental efforts must be made to encourage these institutions to pursue avenues of educational excellence and to begin a serious process which promotes and supports educational innovation, experimentation and evaluation through the sharing of ideas, methodologies, and resources.

2. Today, funders are seeking ways to support and encourage programs and projects which have proven success and which have the potential to serve as replicable models in other settings.
3. There are a wide variety of programs and initiatives currently being sponsored by Supplementary Schools which have tremendous potential to serve as replicable models for other schools. Lacking however, is a national instrumentality responsible for identifying those successes, validating their impact and helping other schools either replicate in full or in part these programs/projects.
4. Lacking on the North American continent is an organized effort to assist central agencies to disseminate to their Supplementary School "network"; to share successes; and identify those elements which contribute to their success.
5. A national program for dissemination which would showcase exemplary programs, products and processes would significantly enhance the image, status and impact of supplementary schooling on a continental level.
6. The establishment for a National Jewish Diffusion Network for Supplementary Schools can not take place in a vacuum. Moreover, this challenge goes far beyond the current capacity of ADCA. Therefore, it is recommended that the ADCA, in partnership with the denominational movements, contract JESNA to serve as the primary continental instrument to administer and staff this initiative.

As envisioned, the ADCA together with the denominational movements would forge a new "working" partnership with JESNA in order to conceptualize this plan and to articulate more fully specific goals and objectives, as well as to develop an operational plan for implementation which would enable central agencies, the synagogue

movements and JESNA to launch a meaningful collaborative effort in this area.

7. In light of the wide variety of projects and initiatives currently being identified as critical to the future success of supplementary schools, it is recommended that this initiative undertake a targeted approach by identifying one or two particular areas or challenges.

One such example may be to target the area of personnel or human resources. This would mean that initially the Network would focus its efforts on in-service and pre-service initiatives, recruitment efforts/strategies, incentives for retention, professional leadership development, as well as models of career ladders, mentorships and other programs, projects and processes which enhance the quality and quantity of the supplementary school personnel workforce.

Another example may be to identify already existing models of "whole institutional change" (ie., a LA, Philadelphia, Hartford and now Boston) and to determine how these models can be disseminated and replicated via a comprehensive national diffusion process.

III CRITERIA FOR SUCCESS AND GOVERNANCE

The "criteria for success" to be employed through the National Diffusion Network, will be identified by a governing body comprised of central agency executives, representatives from the denominational movements, JESNA leadership and leading thinkers in the field of Jewish education. In addition, the governing body will determine the timeline for implementation of the various levels as well as the selection of potential sites and projects.

The initial phase of this proposed project will involve a four-to-six month intensive planning process and the development of an Implementation Action Plan. The

planning and implementation process will be developed by the governing body and convened by JESNA.

IV PROPOSED BUDGET

- Administrative Coordinator (.33 FTE) \$25,000
- Planning Phase (4-6 months)
 - Convening of Meetings, Consultations, and Analysis 12,000
 - Dissemination of Implementation Action Plan 3,000
- Implementation Phase (To be finalized based on Planning Phase)
 - Grants for the Development, Validation, Demonstration and Replication of Projects 200,000
(Includes consultations, seed grants and administrative expenses)

TOTAL: \$240,000

V POSTSCRIPT

The aforementioned proposed initiative represents, in part, an amalgamation of thinking regarding ways in which to upgrade and enhance Jewish supplementary/congregational education into the 21st century. Critical to the success of this initiative will be a willingness on the part of central agencies and the denominational movements to work together in partnership with JESNA. To be sure, one entity cannot do it alone.

Finally, it is hoped that these projects will result in initiating several experimental models of effective supplementary education. These, in turn, will become catalysts for institutional change in an environment which is slowly losing its credibility and perceived effectiveness.

National Diffusion Network for Jewish Supplementary Schools in North America

Proposal Highlight

- establish an effective identification and dissemination network of successful projects for supplementary school education;
- design and implement a process for replicating models of success to foster the development, validation and dissemination of exemplary innovative approaches to the solution of common Jewish educational challenges;
- showcase exemplary programs, products and processes which will significantly enhance the image, status and impact of supplementary schooling on a continental level;
- foster institutional capacity for change by partnering institutions engaged in similar innovative attempts, under the guidance of experts; and
- promote broad-based, system-wide improvement which has the potential to dramatically enhance the scope, quality, and content of Jewish education in North America.

Undergirding the success of this project is the unswerving commitment on the part of central agencies to work in close collaborative partnership with JESNA and the denominational movements, on the local and national levels.

Garnering support and momentum for change, the Diffusion Network potentially will attract funders seeking to support and encourage initiatives with demonstrated success and potential for replication.

The initiative proposes four types of grants:

- **Developer Grants**—Developer funds would be used to generate the design of replicable, exemplary innovative programs, which will create promising new institutional models. Developer assistance would be provided for a minimum of one to a maximum of three years.
- **Validation Grants**—Validation funds would be used to document the effectiveness of innovative programs that have been operational for a period of time and claim to have achieved exemplary results. Criteria to determine validation status include: evaluative data substantiating achievement of stated objectives; cost effectiveness of program; and transferability of program to other institutions beyond the initial program model. A *Certificate of Validation*, will be awarded by the NJDN following careful monitoring and on-site visit by a NJDN Validating Team.

- **Demonstration Grants**—Demonstration funds will be used to demonstrate the potential of successful techniques and practices of validated programs. Demonstration activities may include, but not limited to: sharing of marketing and communication strategies; conducting workshops; consultation during on-site visitations; and development of curricula materials.
- **Replication Grants**—Replication grants will be awarded for the adoption/adaptation of demonstration programs by supplementary schools with similar needs. Participation in the demonstration phase would be a pre-requisite for eligibility. Replication grants will be awarded for a two to three year period. An institution must demonstrate availability of resources to provide continuation of program.

Areas for innovation include, but are not limited to:

Family Education programming

Post Bar/Bat Mitzvah Programs

Arts Education

Professional Development

Mentorship Programs

Adult Learning Models

Specific Innovative Curricular Initiatives

Community Models via School Clusters and Magnet Schools

Informal Educational Programming

"Whole Institution" Change

Phase I: February-June 2000

Convene Planning Committee—March 2, 2000

Develop business plan for Jim Joseph Foundation

Develop action plan for Diffusion Network Planning Committee: "Planning to Plan"

Create job description for and hire Program administrator

Identify funding sources (in addition to the Jim Joseph Foundation)

Delineate grant guidelines and application process

Present business plan/action plan to the Jim Joseph Foundation—June 2000

Phase II: September 2000-June 2003

Implementation of action plan

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(including CIJE)

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4. Dorph, G. Z. & Holtz, B. W. (on submission) Professional Development for Teachers: Why Doesn't the Model Change? *Journal of Jewish Education*.
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19. Fox, S. with Novak, W. (1997). *Vision at the Heart*.
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