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Monitoring, Evaluation, and Feedback. North American agenda,
Charish, 1997.

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MEMORANDUM -- CONFIDENTIAL

October 30, 1996

To: Karen Barth
From: Adam Gamoran, Ellen Goldring, Bill Robinson
Re: What we learned from studying Lead Communities

As discussed in our meeting of Sept. 17, we are sending a brief memo on the highlights of what we learned from studying Lead Communities. We have organized the memo according to the categories of your outline: change readiness, change process, and program characteristics. Please let us know if elaboration on any point would be helpful.

CHANGE READINESS

1. Was there a clear understanding of the problem/opportunity that was causing the need for change?

At a high level of abstraction, concern for the problem of Jewish continuity was widely shared. Inter-marriage, and the corresponding intergenerational decline in the North American Jewish population, was commonly seen as the key manifestation of this problem. At a more concrete and day-to-day level, however, conceptions of the problem were not defined by any shared understanding. Inadequate supplementary schools? Insufficient access to day schools? Low salaries for pre-school teachers? Individual community members raised issues like these, but there was no clear understanding of the connections among these issues or between these issues and the larger problem of continuity. Moreover, many individuals did not see education as a response to the problem of continuity. Finally, we found no evidences of systemic thinking -- that is, thinking about connections across the community -- among individual members or in public discourse.

2. Was there a recognition of the need for change among leadership? Was there an existing or potential leadership group to drive the change?

It has become a matter of faith within CIJE that more rapid and substantial change in the Lead Communities (LCs) would have required at least three key individuals: a federation executive committed to change, a federation staff member capable of leading the change process, and a lay leader to champion the change process across the community. While it is true that none of the

LCs had such individuals in place, this formulation of the problem requires more thought. We are concerned with three issues:

First, the “trinity” interpretation is in one sense tautological. Community mobilization is a major goal of CIJE, and leadership in these three positions is an important component of mobilization. This is almost like saying that in order to mobilize the community, it is important to start with a mobilized community!

For the sake of further discussion, let us set aside this narrow view of the “trinity” interpretation. Rather, the argument is that to mobilize the wider community, it is necessary to start with strong leadership in key positions.

A second challenge to this interpretation is that it is untested. How do we know that leadership in these positions would have yielded an accelerated change process? Persons in these leadership positions would have been faced with challenges inherent in the structure of organized Jewish communities, which makes change difficult. For example, incentives in Jewish federations tend to favor consensus and stability, not diversity and change. We saw this on countless occasions in the LCs: Federation officials in Baltimore have made consensus an art form (see especially the article by H. Baum on strategic planning in the Baltimore Federation); Staff in Atlanta were able to stall any process over which they did not exercise control; and in Milwaukee, change actors were compartmentalized and marginalized, to reduce the pressure on the larger Federation system.

Our experiences raise questions about the potential for Federations to serve as the starting point for change, as per the CIJE model (the Federation as “central address”). These questions are motivated by two conditions: disincentives for change among Federation actors, as noted above; and the distance of Federations from where most Jewish education actually takes place, i.e. in congregations.

Changes that occurred in Cleveland over the past decade have been held up as evidence that broader changes in LCs would have occurred but for the absence of key leaders. This evidence is not compelling, because the situation in Cleveland differed from the LCs in more ways than the absence of leaders in key positions. In particular, lay leadership committed to change was represented by a coalition of actors, not simply one lay champion. Also, relationships between lay and professional leaders in Cleveland seem especially close, compared to other communities. Finally, it appears that definitions of the need for change were more widely shared in Cleveland than in the LCs. Consequently, the example of Cleveland is not sufficient to indicate how things would have turned out by now in the LCs if certain leaders existed in the LCs.

The third, and most important objection to the “trinity” view is that it is irrelevant, in the following sense. The three Lead Communities were selected as the most ready for change among the 23 communities that applied. If key leaders did not exist in the right positions in the Lead Communities, they did not exist anywhere. Consequently, the insight that change would be

facilitated by key leaders is besides the point. Instead, we need to think more about cultivating leadership, and creating incentives for change.

3. Were there talented, middle-level people to drive the change?

Initially, middle-level professionals were lacking in all three communities. Responses to this problem varied across the three communities, and without entering a discussion of individual personnel, one can say that middle-level professional leadership has varied across the communities, and has been more successful in some cases than others.

One challenge across the board has been the need to integrate the community of educators in each community into the change process. This was a major problem at the outset, as educators either did not know anything about the LC process, or if they did, felt alienated from it. The first Harvard Leadership seminar was a watershed in addressing this problem, and subsequent seminars and, presumably, TEI, have built a core of educational leaders who are increasingly committed to upgrading the profession of Jewish education in their communities. This process has been the major success in mobilizing the LCs for change.

On the lay leader side, the development of middle-level actors has also varied across communities. One strategy to develop middle-level lay leaders -- the "wall-to-wall" coalition -- was not successful. Persons from diverse constituencies attended meetings, but these "councils" lacked any clear mandate and fizzled for lack of purpose. Also, members of the coalitions were selected because of their ties to various groups across the communities, but there were no mechanisms by which coalition members might have mobilized the constituencies from which they were selected. A related problem is that lay persons who are active in congregational schools are not necessarily involved with Federations. Because the "wall-to-wall coalitions" were located at Federations, they may have failed to draw in the lay persons who were closest to Jewish education.

4. Were there sufficient resources to support the change program?

To the best of our knowledge, lack of resources was not a barrier to change. Generally, when high-quality initiatives were proposed, they were funded. This holds both for CIJE and for the LCs. Lack of personnel to envision, design, propose, and lead new initiatives was a much more serious obstacle than lack of resources to carry out programs.

With this said, it is important to recognize that relatively little new funding has actually been generated for Jewish education within the communities (compared, for example, to Cleveland). There is no evidence that donors are unwilling to support new initiatives in Jewish education; rather, this situation results from a lack of visionary leadership for educational change, and from the structural disconnection of educational leaders from major donors. In Federations, little

money is available through the standard allocation process for sustained, long-term educational initiatives. Most new money would have to come from foundations and local endowments. Yet Federation staff lack visions for education, and educational leaders (inside and outside of Federations) have little contact with major donors.

5. Was there an internal or external person(s) to play a facilitator role?

CJJE staff members played facilitator roles on many occasions. They were successful in moving ahead, but because the scope of the challenge was much greater than originally anticipated, there was never enough time to facilitate the extent of change that was seen as necessary.

6. Was there the beginning of a shared vision for change?

Within the LCs, there was no shared vision. In our early conversations, community members defined the challenges to Jewish education in one of two main categories: (a) Problems of curriculum, i.e., as a need for better subject matter for students to learn; (b) problems of motivation, i.e., that students needed to feel better about participating in Jewish education. There was no coherence among these views within a community, and there was no grand vision for how these needs could best be addressed. Further, the link between education and continuity was not universally accepted.

CJJE, with its emphasis on community mobilization and building the profession, brought a clear vision to the table. It took about a year to articulate this vision successfully, and more time to convince community members of the strength of this vision and of the broader means of addressing it. This process is still occurring. As one could see at the October 1996 board meeting, lay leaders who are centrally involved in the LC process accept the vision and its implications. We do not know how far this vision extends beyond these individuals.

7. Was there sufficient energy to make it through a long and potentially painful period of change?

For the most part, this question cannot be answered, because when the change process stalled it did so because of a lack of leadership, direction, and purpose, not because of lack of energy. The change process in Milwaukee seems to have had the most longevity -- in the sense that lay leadership is still driving educational change -- and energy for change still exists there.

CHANGE PROCESS

Was there a well-organized change process that included:

- Setting up a change structure; developing a change process; creating a vision, developing strategies?

The early work of CIJE in LCs was carried out “on the fly.” There was a lot of “learning by doing.” A potentially important document, the “Lead Community Planning Guide,” was difficult to follow and was largely ignored. An important early meeting between CIJE and LC representatives failed to clarify the responsibilities and expectations on each side. These difficulties could not have been avoided completely, since the LC process was a new situation for all participants. More active attention to the literature on educational change might have helped (e.g., lessons from the RAND change agent study). Also, it would have helped to recognize that the early work in LCs had to do with community dynamics, not education. The MEF team failed to recognize and bring attention to this issue until two years had passed.

CIJE’s vision was present from the outset, but the change structure, process, and strategies were not.

From the community side, change processes were not well organized. Community participants began without clear plans or strategies for long-term initiatives. In the absence of coherent visions and strategies, any short-term plan that came up might be (and often was) considered viable. This led to an especially fragmented process from within the communities (even less coherent than CIJE’s change process).

- Planning and creating short-term wins

Short-term wins through the Harvard Leadership Seminars and the Goals Seminars were major successes for CIJE and have done much to establish credibility and make long-term progress possible. CIJE staff are exceptionally talented and have exhibited outstanding success with short-term seminars.

From the community side, there were no short-term wins connected to the Lead Community process.

- Consolidating improvements; institutionalizing new approaches

One can view TEI as an institutionalization of CIJE’s success in running short-term seminars. Because TEI is on-going and includes highly developed products (videotapes) and an evaluation, it is expected to yield broader and more long-lasting change than the short-term seminars.

Despite the lack of short-term wins, two successful initiatives within communities have been institutionalized. These are Machon L'Morim in Baltimore, and the masters in Jewish education program through distance learning in Milwaukee.

PROGRAM CHARACTERISTICS

Did the program have the following characteristics:

- Action-oriented
- Attention to process
- Over-communications
- Cultural alignment
- Superior skills

Each of these characteristics is more present in 1996 than it was in 1992. With enhanced credibility and cooperation from the LCs, the superior skills of CIJE staff in the area of education can be put to good use. As communities have accepted the claims of the Policy Brief, CIJE and the communities have approached a more common definition of the problem. We do not have information about the quality of communication between CIJE and participating communities, but communication within CIJE is still problematic. The intense workloads of CIJE staff and consultants makes it difficult to ensure that relevant persons are fully informed. The division of CIJE into domains may contribute to communication breakdowns, and a re-organization by projects instead of domains may address this problem.