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COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128 • New York, NY 10003
Phone: (212) 532-1961 FAX: (212) 213-4078

TELEFAX

TO: Seymour Fox **DATE:** November 12, 1992
Annette Hochstein

FROM: Art Rotman **FAX #:** 619 452

Number of pages (including this sheet) 17

MESSAGE:

I asked Shulamith to develop an interpretive piece on CIJE based on what has already been prepared. This is for discussion on the 19th and 20th.

Warm regards,

Art

NOV 12 94 09:00 PM CIVE 221000 1058 4

DRAFT III

I. WHAT IS THE LEAD COMMUNITIES PROJECT?

The Lead Communities Project is a joint continental-local collaboration for excellence in Jewish education. The purpose is to demonstrate that it is possible to significantly improve Jewish education, both formal and informal, in communities in North America with the right combination of leadership, programs, resources, and planning.

II. RATIONALE

A. IMPROVING EFFECTIVENESS

The heart of this effort is a commitment to help improve the effectiveness of Jewish education in North America.

Jewish education involves not only acquisition of knowledge but also the development of skills, shaping of values, and influence of behavior. It can take place in a day school, a supplementary school, summer camp, congregation or Jewish community center, on a trail in the Galilee, in a living room in Iowa, or in a setting where young and old learn together. It happens through study of text, a lecture, film, computer, discussion groups, or field trips.

However it happens, Jewish education must be compelling -- emotionally, intellectually, and spiritually. It must inspire greater numbers of Jews, young and old, to remain engaged, to learn, feel, and act in a way that reflects an understanding of and commitment to Jewish values.

To achieve this objective, Jewish education must be nurtured, expanded, and vastly improved. Both the CIJE and the Lead Communities will set goals for "improvement." These will take a concrete form through:

- more and better Jewish education programs and services;
- greater participation in Jewish education; and
- better outcomes (related to Jewish knowledge, skills, behaviors, and values).

The central thesis of the Lead Communities Project is that the best way to generate positive change on a continental scale is to mobilize the commitment and energy of local communities to create successes that stand as testimony to what is possible.

B. "MODELS" AS A STRATEGY FOR POSITIVE CHANGE

Local efforts that are working well need to be reinforced. Local communities have to be connected to the pockets of excellence across the nation that too often have worked in isolation. Positive change will require a vehicle to encourage inspired approaches and to support innovation and experimentation. This project makes it possible to evaluate, improve, and try out a variety of approaches for Jewish education throughout the

community, and prepare the groundwork for adoption and expansion of good ideas elsewhere.

Fundamental to the success of this project will be the commitment of the community and its key stakeholders. The community must be willing to set high educational standards, raise additional funding for education, involve all or most of its educational institutions, and, thereby, become a model for the rest of the country.

C. Systemic Change at the Community Level

For the purposes of this project, a community is an urban or metropolitan area with a communal organization structure and decision-making system in place. The initial focus is on three communities with a population range of from 28,000 to 92,000 -- Atlanta (70,000), Baltimore (90,000), and Milwaukee (28,000).

A cornerstone of the Lead Communities Project is the emphasis on the entire local community rather than the individual school, program, or Jewish camp. The evidence is growing in general education as well as Jewish education that lasting educational reform involves the interaction of school, family, and community because there is a continuing interplay among them. One needs to affect the entire community, not just a single setting, program, or age group.

To improve Jewish education we need to create integrated service delivery systems and dramatically increase the quantity and quality of Jewish education in the community.

III. ESSENTIAL ELEMENTS: BUILDING THE LEAD COMMUNITIES

A. LEADERSHIP AND COMMUNITY SUPPORT

Recruiting top community leaders to the cause of Jewish education will help raise Jewish education to the top of the communal agenda. A task force/commission will serve as the local implementation mechanism with professional staffing and the appointment of an outstanding individual to lead the commission. All sectors of the community -- congregations, schools, community centers, and federations -- will need to be involved in work with a wall-to-wall coalition consisting of the federation, synagogues, centers, educational institutions, i.e., day schools, camps, central agencies, the college campuses. Rabbis, educators, professionals, scholars, lay leaders, and parents will participate in guiding the project in each community with public discussion and debate among all the stakeholders encouraged. Lead Community leadership, both professional and lay, will also participate in the ongoing effort to define and refine the Project as it is extended to other communities.

B. PROGRAMS: LOCAL PROJECTS AND INITIATIVES

Each of the Lead Communities will engage in the process of redesigning and improving Jewish education through a wide array of intensive programs. The programs of the Lead Community need to reflect continental as well as local experience and ideas.

Lead Communities will benefit from successful experiences across the continent. CIJE is undertaking a systematic effort to identify the best examples of specific programs, projects, or institutions in North America, called the "Best Practices Project." In preparing action plans, Lead Communities will have access to the inventory of the most promising programs.

There are two kinds of programs -- "enabling options" and programmatic options.

The report of the Commission on Jewish Education in North America recommends that Lead Communities concentrate on personnel and broadening community support as critical "enabling options."

"The Commission realizes that personnel and the community are interrelated, each being dependent on the other for success. For Jewish education to attract talented and dedicated Jews to the field, these individuals must believe that the Jewish community will give them the support and resources necessary to make the difference. The community, on the other hand, will only mobilize for the cause of Jewish education if it believes that a highly qualified profession of Jewish educators is being developed. It is, therefore, necessary to develop a program that includes simultaneous treatment of both the shortage of personnel and the community's support for Jewish education." (Fox and Hochstein, *Jewish Education*. Fall 1991)

A promising programmatic option is study and travel in Israel, which has proven to be a very effective motivator for young and old alike. Thus, personnel, community support, and educational travel by youth to Israel will be important ingredients in the community's plan of action.

Local initiatives may include improvement or expansion of existing programs or the creation of new ones. It is anticipated that communities will devise new programs that cross traditional boundaries of age, setting, or content. Examples of other programs that could be undertaken, separately or combined in an imaginative way as part of a Lead Community's program include:

- Replicating good schools and/or establishing model schools;
- Developing outstanding programs at Jewish community centers;
- Intensifying and improving early childhood programs;
- Designing programs in adult and family education;
- Creating cooperative programs between the community and local college campuses;
- Developing new models of post bar or bat mitzvah education;
- Developing strategies for outreach;
- Raising the level of Jewish knowledge of communal leaders;
- Using new technology (video and computers).

Lead Community projects are expected to address both scope and quality; they should be comprehensive enough to make an impact on a large segment of the community; and focused enough to ensure standards of excellence.

C. RESOURCES

A program of breadth, depth, and excellence will require new monies, primarily because the endeavor has long been underfunded. A Lead Community will point a direction in this area as well -- substantially upgrading the local investment in Jewish education from a variety of sources: federation's allocations, private foundations, congregations, endowments, tuition, and other sources.

An important part of CIJE's role is to mobilize private foundations, philanthropists, and other continental resources to match the financial efforts of local communities. (See VII)

D. PLANNING

The plan for each Lead Community will include: an assessment of the state of Jewish education in the community at the present time; an analysis of needs and resources; the development of a strategy and priorities; the design of programs; and the preparation of action plans for improving educational effectiveness.

The Lead Communities Planning Guide will provide guidance in the methods of analysis and assessment of each community's current status and in the establishment of priorities and the design of implementation strategies, including approaches to the design of specific programs to address these priorities.

RG

IV. THE CONTENT OF THE EDUCATIONAL PLAN

A. A VISION FOR CHANGE

Change will depend upon the development and projection of a vision of what the community hopes to achieve within the next 3-5 years as a Lead Community and where it "wants to be" in terms of the Jewish education (knowledge, behavior, participation) of its children and adults.

It is anticipated that the community's participation in the Lead Communities Project will generate serious discussions and work on the content of Jewish education throughout the community and within all of the institutional settings (synagogues, schools, centers, camps, etc.) where Jewish education takes place. The discussion of "vision" at the level of community may be paralleled within institutions and like-minded groups such as the movements and denominations.

B. APPROACHES TO AFFECT EACH AGE GROUP -- EARLY CHILDHOOD THROUGH SENIOR ADULT

The plan will address the education of each major life cycle group in the community. (E.g., singles, families with young children, teens, the college years, empty nesters, and older people.)

Within each major group of community clients, planning will focus on:

- articulation of content and related curricular issues

- introduction of "Best Practices"
- personnel (recruitment, training [pre-service], compensation, [to include benefits], and related issues) and the required in-service training for all personnel in all programs and in all settings
- integration of formal and informal programs through development of an integrated service delivery system
- identification of best use of the resources of the national organizations, movements, and training institutions

C. APPROACHES TO EACH SETTING -- WORKING WITH THE LOCAL EDUCATIONAL INSTITUTIONS

Jewish education takes place in a variety of formal and informal settings and under the auspices (sponsorship) of various local (and sometimes regional) organizations. These local settings may include:

- Adult residences
- Camps
- Central agency
- College campus
- College of Jewish Studies
- Community Supplementary Schools
- Congregational Schools
- Federation
- Israel programs
- Jewish community centers
- Libraries
- Museums

- Synagogues
- Youth Groups

FIRST D. APPROACHES TO PERSONNEL: THE ROLE OF EDUCATORS AND RABBIS

Within each setting and mindful of the required in-service training for all personnel in all programs and in all settings Lead Community-wide effort, planning will focus on the "enabling option" the building of the profession:

- articulation of content
- curricular issues
- introduction of "Best Practices"
- recruitment
- training (pre-service)
- compensation issues (to include benefits)
- retention
- identification of best use of the resources of the national organizations and training institutions

E. MAXIMIZING THE IMPACT OF THE INTEGRATION OF FORMAL AND INFORMAL EDUCATIONAL PROGRAMS

In a community-wide effort to improve Jewish education, the integration of formal and informal programs is the optimal approach for the introduction of innovation and change.

Planning on the local level is the responsibility of the local commission working with the guidance and assistance of the CIJE staff and will include:

- attention to content and its articulation
- development of key personnel
- maximum use of Best Practices
- all institutions involved

Special strategies will need to be developed to address the challenges of the integration of formal and informal Jewish education in an integrated service delivery system.

V. BEST PRACTICES

The Best Practices Project will create an inventory of exemplary/effective/successful/good or "best practice" in a wide variety of programmatic areas of Jewish education. Beginning with the most "popular" and familiar settings in which Jewish education takes place at the communal level -- congregational religious schools, nursery and preschools (sponsored by congregations, Jewish community centers, and others), day schools, Jewish community centers, Israel programs, ~~campus programs~~, ~~camp programs~~ -- both residential and day -- and continuing to ~~encompass all of the settings~~ that are applicable to the Lead Communities.

One of the purposes of the Project is to assist the individual communities in bringing about significant change in local institutions through consideration of adaptation and possible replication of "best practice."

By January 1993 it is anticipated that materials and approaches will have been developed to introduce this Project to the Lead Communities so that it can be utilized in the planning process.

~~It is expected that the Talent Bank will include the individual experts who have participated in the Best Practices Project as well as those professionals responsible for the successful best practices that the project has identified.~~

VI. FOUNDATION LINKAGES AND FUNDING

Contacts have been established between the CIJE and foundations interested in Jewish education, in general, and specific programmatic areas. Proposals are being developed around the following areas:

- systemic change in Jewish education
- demonstration projects in three local communities (simultaneous efforts in a single or several programmatic areas)
- introducing Best Practices to a local community (proposal submitted to ~~the Nathan Cummings Foundation re Supplementary schools~~)

- personnel issues (preliminary discussion with the Covenant Foundation re their funded project for "avocational" teachers in a synagogue school in a small community)

This approach is based on the image of the Lead Communities as "local laboratories" for programs that will eventually be disseminated to other than Lead Communities.

On the local level, the CIJE has begun work with the communities to identify, educate, and cultivate local foundations towards support of the Lead Communities project and local initiatives in Jewish education.

The Mandel Associated Foundation (MAF) grants to the training institutions (Hebrew Union College, Jewish Theological Seminary, Yeshiva University) and the Jewish Community Centers Association will directly benefit the Lead Communities as it is expected that these schools or departments of education will undertake specific assignments in the area of personnel.

In a new foundation initiative, discussions are underway with secular foundations whose interests include general and religious education and specifically the issues of change and reform.

VII. ATLANTA, BALTIMORE, AND MILWAUKEE: PLANNING AT THE LOCAL LEVEL

VIII. MONITORING, EVALUATION, AND FEEDBACK

How will we know the lead communities have succeeded in creating better outcomes for Jewish education? On what basis will the CIJE encourage other cities to emulate the programs developed in lead communities?

The Monitoring, Evaluation, and Feedback Project will help each Lead Community answer these questions through a comprehensive process which will document a community's efforts and gauge its success. Three experienced field researchers will be responsible for collecting and analyzing data in the Lead Communities. Working individually and as a team, the researchers have begun to observe, interview, and document many aspects of the project in an effort to fulfill the three-fold purpose of this CIJE initiative:

- to carry out ongoing monitoring of progress
- to evaluate progress

- to provide feedback (channel findings back to the community and the CIJE)

During the initial year of the Project, the field researchers will seek to insure that each community has a specific set of goals for the improvement of Jewish education. For example,

- What are the visions for change in Jewish education held by members of the communities:
- How do the visions vary among different individuals or segments of the community?
- How vague or specific are these visions?

To focus attention on the critical role of the Jewish educator and to address the community's attention to the enabling option of "building the profession" of Jewish education, the researchers will address personnel concerns by surveying the community with regard to the following:

- What is the nature of the professional life of educators in this community?
- Under what conditions do teachers and principals work (i.e., what are their salaries and benefits)?
- Are school faculties cohesive or fragmented?
- Do principals have offices?
- What are the physical conditions of classrooms?
- Is there administrative support for innovation among teachers?

The community's ability to mobilize broad-based support -- the second of the enabling options -- will be addressed by the following questions:

- Who is involved, and who is not?
- How broad is the coalition supporting the CIJE's efforts?
- How deep is participation within the various agencies (i.e., beyond a small core of leaders, is there grassroots involvement in the community)?
- To what extent is the community mobilized financially as well as in human resources?

COUNCIL FOR INITIATIVES IN JEWISH



0

CIJE STAFF MEETING
Thursday, November 19, 1992
Friday, November 20, 1992

Participants: S. Elster, S. Fox, E. Goldring, S. Greenfield, A. Hochstein, B. Holtz, D. Marom, J. Meier, A. Naparstek, A. Rotman, J.A. Schaffer, J. Ukeles, J. Woocher, S. Wygoda

AGENDA

THURSDAY, NOVEMBER 19

12:30-3:00 p.m.
(Including Lunch)

THE FIRST YEAR

- Desired Outcomes
- Expectations of CIJE
 - Monitoring, Evaluation, and Feedback
 - Mobilization of Funding Resources
 - Goals Project
 - Pilot Projects
 - Other
- Expectations of Lead Communities
 - Short & Long Range Plan
 - Self Assessment
 - Desired Outcomes
 - Involvement of Broad Spectrums
 - Development of Plus Resources for Jewish Education

A. Rotman
S. Elster

S. Elster

B. Holtz

E. Goldring
A. Naparstek
A. Hochstein
A. Hochstein

S. Elster
J. Ukeles

Post-It™ brand fax transmittal memo 7671 # of pages 2

To	S. Fox, A. Hochstein	From	A. Rotman
Co.		Co.	
Dept.		Phone #	
Fax #		Fax #	

3:00-4:30 p.m. COMMUNITY MOBILIZATION AND WORK PROCESS J. Ukeles
S. Elster

- Introduction of Lead Communities Idea into the community
- Local Mechanism for Implementation
- Organizational and Process Issues
- Purveyors of Educational Services
- Lead Communities: An Interpretive Statement

4:30-6:30 p.m. FUNDRAISING

- Local
- Foundations
- CIJE Board

FRIDAY, NOVEMBER 20

8:30-11:30 a.m. LEAD COMMUNITIES PLANNING WORKSHOP J. Ukeles
(November 23-24)

- Desired Outcomes and Format
- Participants
- Program
- Timetable
- Evaluation

11:30 a.m.-12:00 p.m. NEXT STEPS A. Rotman

- Next Staff Meeting
- Assignments
- Timetable
- Other

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128

New York, NY 10003

Phone: (212) 532-1961

FAX: (212) 213-4078

MEMORANDUM

DATE: November 12, 1992

TO: Lauren Azoulai
Chaim Botwinick
Shulamith Elster *
Seymour Fox *
Steve Gelfand
Roberta Goodman
Annette Hochstein *
Barry Holtz
Nancy Kutler

Marshal Levin
Daniel Marom
Jim Meier
Howard Neistein
Claire Rottenberg
Julie Tammivaara
Jack Ukeles *
Jon Woocher
Shmuel Wygoda

FROM: Jo Ann Schaffer

SUBJECT: November 23rd/24th

This is to confirm a dinner meeting on Monday, November 23, from 6:00-9:00 p.m. to take place at UJA/Federation, 150 East 59th Street, the Carl Lefkowitz Room on the Second Floor.

The meeting will continue the following day in the JCC Association's Conference Room on the 14th floor from 8:30 a.m.-4:00 p.m. A light breakfast will be available at the start of the meeting and we will also provide a dairy lunch.

* This group will meet with Art Rotman from 4:30-6:00 p.m. in the JCC Association's Mazer Study

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

TO: S. Elster *
S. Fox *
E. Goldring
S. Greenfield
A. Hochstein *
B. Holtz
D. Marom
J. Meier
A. Naparstek
J. Ukeles *
J. Woocher
S. Wygoda
Henry Zucker

DATE: November 12, 1992

FROM: Jo Ann Schaffer

SUBJECT: November 19/20

This is to confirm a meeting on November 19 from 12:30-6:30 p.m. to take place at 15 East 26th Street, 11th floor (NY County Medical Society's Conference Room, Suite 1101). A dairy lunch is planned.

The meeting will continue the following day and will be held in the JCC Association's Conference Room on the 14th floor, 8:30 a.m.-12:00 p.m. A light breakfast will be available at the start of the meeting.

* This group will meet with Art Rotman from 11:00 a.m.-12:30 p.m. in the JCC Association's Mazer Study.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

Vera
Please tell
him its
10 a.m.
Thanks!
A

TELEFAX

TO: Annette Hochstein **DATE:** November 12, 1992
FROM: Art Rotman **FAX #:** 619 452

Number of pages (including this sheet) 1

MESSAGE:

As you requested, Shmuel Wygoda will be included in the Staff Meetings on November 19/20. However regarding the Planners Meeting on the 23/24, I am really anxious to reduce the number at the table, so for the moment let's say Shmuel will be an observer. We can talk about this again later.

It looks like our next staff meeting will probably be on Tuesday, December 1, from 9:00-11:00 a.m.

You can call me on November 17. I will be free from 10:00 a.m. to 12:30 p.m. and from 2:30 p.m. on.

I will be out of the office Thursday and Friday attending the GA. The agenda has not been finalized but you will receive it as quickly as possible.

Warm regards,

Art

Mandel Institute

FAX SENT
DATE: 11/11/92
358x

מכון מנדל

Tel. 972-2-617 418; 618 728

Fax: 972-2-619 951

URGENT

Please deliver
to Art before 10A.

Facsimile Transmission

To: Art Rotman	Date: November 11, 1992
From: Annette Hochstein	No. Pages: 3
Fax Number: _____	

Dear Art,

It was good talking to you yesterday. I enclose the latest version of our agenda for the CIJE workshop. I hope that you find it useful.

Best regards,

Annette

Annette

P.S.: I was delighted to find out yesterday that "A Time to Act" has in fact been reprinted. It would be great if we could have copies available for the lead communities planners workshop. We have found it to be an effective tool in explaining and putting forth the intentions and ideas of the Commission.

A-

CIJE

Sugge

Thursday November 19th and Friday November 20th, 1992

TOPIC: YEAR 1 WORKPLAN

A. The First Year Assignment

1. Overview
2. Desired Outcomes

B. Projects

1. Introduce best practices project (discuss with community, choose, develop strategy for adopting best practices).
2. Implement pilot projects in key area of endeavor (personnel and community).
3. Launch the goals project with reference to monitoring, evaluation and feedback project.
4. Introduce the monitoring, evaluation, feedback project and set up feedback process.

C. The Planning Assignment for Lead Communities

1. Educational self-assessment
2. The 5-year plan

D. Community Mobilization and Work Process

1. Introducing the Lead Community idea into the community
 - a. Desired outcomes (what do we need members of each of the following groups to know?)
 1. Lay leaders
 2. Professionals and planners
 3. Educators and rabbis
 - b. Methods and setting (individual meetings, seminars, workshops)
 - c. Timetable

2. The local mechanism for implementation
 - a. Representativeness
 - b. Staffing
 - c. Process
3. Other organizational and process issues

E. **Lead Communities Planning Workshop (Nov. 23-24)**

1. Desired outcomes and format
2. Participants
3. Program
4. Timetable

F. **Other CIJE Assignments:**

1. Working with purveyors of educational services
(e.g., training institutions, JCCA, JESNA, CLAL, CAJE,
etc.)
2. Working with foundations
3. Fundraising

G. **Next Steps**

1. Next staff meeting
2. Assignments
3. Timetable
4. Other

Mandel Institute

מכון מנדל

Tel. 972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To: Art Rotman Date: 10/11/92
From: Quette Hochster No. Pages: 1
Fax Number: _____

Dear Art,

Re: your fax of November 9

1. The two Mandel Institute staff members joining us are:

Daniel Marom -- researcher, the Mandel Institute.

Mr Marom, a Jerusalem Fellow, is a specialist in teacher-training and Jewish history. He is the coordinator of the Institute's project on "the Educated Jew".

Shmuel Wygoda - researcher, the Mandel Institute.

Rabbi Wygoda, a Jerusalem Fellow, has recently joined the Institute following 5 years in Montreal where he served as Principal of the "Hebrew Academy" day school. He is the coordinator of the Institute's project on Personnel for Jewish Education.

2. I would love to discuss the agendas with you: the intensive work we are doing here in preparation of the meetings will probably lead to revisions.

3. Your remark on the composition of the group for Nov.23/24 is right. We should discuss this later today when we speak.

Best Regards,

Quette



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*recognizing 90 years of service to
 the Jewish community*

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To <i>A. HOCHSTEIN</i>	From <i>J. SCHAFFER</i>
Co.	Co.
Dept.	Phone #
Fax #	Fax #

MEMORANDUM

TO: Art Rotman

FROM: Richard Meyer

DATE: November 4, 1992

RE: Milwaukee's Participation in the "Lead Communities" Project

I am pleased to inform you that our Federation Board of Directors has approved Milwaukee's participation in the CIJE's "Lead Community" Project. As a condition for our participation, we are requesting some changes in the language of the "Letter of Understanding" that was forwarded to us on October 21. I have attached a copy of the proposed changes with the most significant being a revision of the second paragraph on page 4.

Our leadership is committed to the success of the "Lead Community" Project. However, it would be unrealistic for our community to commit to significantly expand communal resources committed to Jewish education at this time. We ask that you be sensitive to the decline in our Campaign achievement over the last two years and to acknowledge our already high proportion of resources allocated to Jewish education. We therefore request that the paragraph on page 4 to be revised as follows:

- "Work to maintain and expand the aggregate communal resources devoted to Jewish education - While it is recognized that Milwaukee already allocates a higher percentage of its annual Campaign to Jewish education than most other communities, the Commission on Jewish Education and the Milwaukee Jewish Community will seek to obtain those financial resources needed to meet the goals of the project through endowment funds, local foundation grants and other sources of local funds."

We await hearing from you further on this revision or any of the other language changes in the attached document. We look forward to working with you on this exciting new venture.

HN/RM/nm

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

LEAD COMMUNITIES PROJECT · Mailing Address · 163 Third Avenue #128 · New York, NY 10003
tel: (212) 532-1961 · fax: (212) 213-4078

October 21, 1992

LETTER OF UNDERSTANDING

Dear Mr. Meyer;

I am writing to confirm that the Jewish community of Milwaukee and the Council for Initiatives in Jewish Education (CIJE) have agreed to participate in a joint local-continental collaboration for excellence in Jewish education, called the Lead Communities Project.

The Commission on Jewish Education in North America (COJENA) found that the best way to generate positive change at the continental scale is to mobilize the commitment and energy of local communities to Jewish continuity, and recommended the creation of lead communities.

The lead community is expected "to function as a local laboratory for Jewish education; to determine the educational practices and policies that work best; to redesign and improve Jewish education through a wide array of intensive programs; to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, with a high level of community support and with the necessary funding."^{7, 8}

The Jewish community of Milwaukee has established a ^{Jewish Education Task Force} ~~Milwaukee Association for Jewish Education~~. The community views the Lead Communities Project as an opportunity to

.....
This letter is a summary of discussions between the Council for Initiatives on Jewish Education (CIJE), and the Milwaukee Jewish Federation. Its purpose is to clarify our mutual expectations with regard to the implementation of the Lead Communities Project in Milwaukee.

^{to} Create ~~a~~ Vision and
the Milwaukee's agenda for Jewish Education for the 1990's, to gain a
solid base of support and participation ~~and~~, to implement a plan that
raises the overall quality of what is offered ^{and the Leadership Services} and to facilitate new initiatives
areas that address Jewish continuity concerns.

⁷ A Time to Act (University Press of America, Lanham, Md., 1990), p. 17; see also pp. 67 - 69.

⁸ See also Lead Communities Program Call for Action, CIJE, 1992.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

This letter covers the three year period from Sept 1, 1992 through August 31, 1995.

↳ October 27 (?) - date of approval?

- 1992-93 is the Planning Year (see below)
- 1993-94 is the first Action Year
- 1994-95 is the second Action Year

During 1992-93, the Jewish community of Milwaukee with the advice and assistance of CIJE, will prepare a five year plan for improving Jewish education. The plan will include: a needs assessment, mission or vision statement(s), program priorities, and a strategy for financial and human resource development. The plan will build on the work of the ~~Milwaukee Association for Jewish Education~~ and incorporate appropriate elements of work already completed. The community by February 1, 1992 will prepare an outline of the 5 year plan identifying the major topics to be covered, preliminary findings, program ideas ~~and tentative conclusions~~.

{ we believe that the timeline may be unrealistic given where we currently are.

Along with the five year plan, the community will also prepare an Action Program for 1993-94 which will include the schedule of the specific improvements to be undertaken; and the costs and revenues associated with each specific improvement effort.⁹

The plan and the action program will be completed by May 31, ~~1992~~ 1993

During 1993-94, the community will carry out the implementation of the first year's Action Program and prepare an Action Program for 1994-95.

During 1994-95, the community will carry out the implementation of the second year's Action Program and prepare an Action Program for 1995-96.

In support of these efforts, CIJE agrees to:

- Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education, Early Childhood Education, JCC programs; Israel Experience; Day School; Campus Programs; Camping; & Adult Education. Information on all areas will be made available between October, 1992 and the end of May, 1993. The lead community will ~~adapt and introduce~~ *and* *and* these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE. *consider*
- Provide technical assistance in planning and educational development. The community will have access to assistance from a roster of experts provided by CIJE at no cost to the community.

⁹ See Appendix A for a brief description of some of the possible areas of content of a Lead Communities Plan.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

- Introduce potential funders to the community -- including continental foundations interested in specific project areas.
- Negotiate with foundations, organizations, and providers of programs -- training institutions, JCCA and JESNA -- to define the nature of their involvement and their contribution to Lead Communities.
- Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.
- Convene lead community leadership for periodic meetings on common concerns. *(write page?)*

The Lead Community agrees to:

- Establish a ~~Lead Community Committee~~ ^{Commission on Jewish Education} to direct the project. The ~~Committee~~ ^{Commission} will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The ~~Committee~~ ^{Commission} will be chaired by ~~Louise Stein and Jane Gellman~~.
- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g. parents and students), educators, board members and Rabbis.
- Appoint a Lead Communities Planning ~~Director~~ ^{Coordinator} to staff the ~~Lead Communities Committee~~ ^{Commission on Jewish Education} and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (~~e.g. the Planning Director of Federation and the Director of the BIE~~) are expected to be ~~fully involved~~ ^{active participants} in the process. *in 1992-93*
- Prepare a five-year plan, and annual action programs (as described above).
- Appoint a Lead Communities ~~Director~~ ^{Coordinator} to direct the Action Program for 1993-94 onward. *(which may be the same person as the Planning Coordinator)*
- Integrate the findings of the Best Practices Program appropriate to the Lead Community. (as discussed above).
- Identify and begin one or more experimental programs within the first year.
- ~~Build~~ ^{Address the building of the} the profession of Jewish education, and thereby address the shortage of qualified personnel.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

- Mobilize community support to the cause of Jewish education.
- Significantly expand the communal resources committed to Jewish education. *Based on one community's experience in implementing the recommendations of its Commission on Jewish Continuity, "significant expansion" should result in at least a 40% increase in communal resources for Jewish education by the third year action program. Communal resources include regular allocations, endowment funds, local foundation grants, and other sources of local funds.*
- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.
- Work with CIJE to disseminate the results of their experience to other communities.

see below

During the summer of 1993 and the summer of 1994, the work of the preceding year will be reviewed by the partners. This Agreement may be terminated at the end of one of these reviews if it appears to either partner that the other has failed to perform in relation to this agreement.

CIJE

By: _____

Title: _____

Date: _____

Federation

By: _____

Title: _____

Date: _____

Work to maintain and expand the aggregate communal resources devoted to Jewish education - While it is recognized that ~~the~~ Milwaukee already allocates a higher percentage of ^{the} annual Campaign to Jewish education than most other communities, the Commission on Jewish Education ^{of the J. Community} will seek to obtain those financial resources needed to meet the goals of the project through endowment funds, local foundation grants and other sources of local funds.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address:
163 Third Avenue #128, New York, NY 10003
Phone: (212) 532-1961 • Fax: (212) 213-4078

November 10, 1992

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ATTENTION: KIM

Re: Account # 10022RUDE

I understand that you are holding approximately 2,300 soft-cover copies of *A Time to Act*. Please send 1,000 copies immediately to:

Jo Ann Schaffer
Council for Initiatives in Jewish Education
15 East 26th Street
13th floor Mail Room
New York, New York 10010

We would also like an additional 500 copies shipped to:

Annette Hochstein
The Mandel Institute for the Advanced Study
& Development of Jewish Education
22a Hatzfira Street
Jerusalem 93012 ISRAEL


Please send the bill for both shipments to:

Virginia F. Levi
Mandel Associated Foundations
4500 Euclid Avenue
Cleveland, Ohio 44103

We will be in touch with you about when and where to ship the remaining books. Your prompt assistance would be greatly appreciated.

RECEIPT OF
THIS ORDER
CONFIRMED BY
UNIVERSITY
PRESS
-EARLIER ORDER
MISPLACED

CC: Virginia Levi
Annette Hochstein


Jo Ann Schaffer

Post-It™ brand fax transmittal memo 7671 # of pages 3

To <i>A. HOCHSTEIN</i>	From <i>A. ROTMAN</i>
Co.	Co.
Dept.	Phone #
Fax #	Fax #

LAUNCH OF LEAD COMMITTEES: WORKPLAN
 [Revised 11/9/92]

TASK	RESPONSIBILITY	KEY MILESTONES	ISSUES/COMMENTS
LETTER OF UNDERSTANDING ■ Draft #1 ■ Draft #2 ■ Negotiation ■ Final ■ Signing	UAI (Ukeles) UAI (Ukeles) Elster & Ukeles Rotman as needed Rotman & CIJE Lay Leaders	10/1 & 10/2 10/15 November December	Link to Local Event <i>Do</i>
PLANNING GUIDELINES ■ Draft #1 ■ Draft #2 <i>outline</i> ■ Review with community planners ■ Final <i>Final</i>	<i>redo with AH after meetings</i> UAI (Meier) UAI (Meier) UAI (Meier)	10/15 11/4 11/18 11/23 & 11/24 11/30 <i>1/12</i>	Workshop with Planning Directors <i>make website like education</i>
PRESENTATION TO COMMISSIONS ■ GA Forum & Event ■ Local events	Rotman Rotman & CIJE Lay Leaders	11/12 & 11/13	✓ Community-specific events to introduce Project to various publics; Link to Signing
CIJE STAFF COORDINATE ■ Executive staff ■ Program Directors	Rotman Rotman & <i>Elster Holtz</i>		<i>calls: AH +</i> Wkly mtgs (Rotman, Elster, Greenfield & Ukeles)
BEST PRACTICES ■ Design (inform & access) ■ Inform ■ Access	<i>Fox</i> Elster, Holtz & Ukeles Elster & Holtz Elster & Holtz		Need to finalize timetable for deliverables and design methods to inform communities and create points of access

NOV 09 '92 05:12 PM CIJE 221308 Page 1 of 3

TASK	RESPONSIBILITY	KEY MILESTONES	ISSUES/COMMENTS
COMMUNICATION & PR <ul style="list-style-type: none"> Identify Publics Communications Plan Implement 	<i>Rotman?</i> Elster ? ?		Use of outside consultant/firm; Assignment of responsibility; Coordination (if any) between Local PR in each community and overall CUE plan
COMMUNITY CONSULTANTION ("TALENT BANK") <i>Best Practices Project</i> <ul style="list-style-type: none"> Concept Document Assign Responsibility Manage System Locate Individuals Inform Communities Access 	Meier Rotman ? ? ?	November early November	Design links to Best Practices
CONTINENTAL/COM PLANNING PROCESS <ul style="list-style-type: none"> Meet with Planners Meet with community lay leaders ("the Seminar") Community planning process 	(A.H.) Ukeles & Elster Rotman & CIJE Lay Leaders A.H. + Educators, Lay, Pro Elster & Ukeles	11/23 & 11/24 January ongoing	For all: agenda, invites, location, dates
LIAISON TO NATL RESOURCES <ul style="list-style-type: none"> IHJL Organizations Denominations Senior Advisors 	A.H. + A.R. + Elster	ongoing December	Link to community consultation (talent bank); who pays for what
FINANCIAL RESOURCES <ul style="list-style-type: none"> Nat'l Foundations Local Foundations & individuals 	Naperstek <i>Rotman</i>	ongoing	Process for linking local needs definition to foundation interests; funding flow; CUE as recipient; and CIJE as broker

NOV 09 10:22 AM CUE 221308
 NOV 09 10:22 AM Page 2

TASK	RESPONSIBILITY	KEY MILESTONES	ISSUES/COMMENTS
MONITORING, EVAL & FEEDBACK <ul style="list-style-type: none"> ■ Introduce field researchers to community ■ Dev feedback loop ■ Set terms for first report 	Rotman, <i>Hochster / Fox</i> Ekster & Rotman Gamoran & Goldring } <i>+ committee</i> Gamoran & Goldring	ongoing late Sept, early Oct October October	Include baseline portrait

e

LAUNCH OF LEAD COMMITTEES: WORKPLAN
 [Revised 11/9/92]

Post-It * brand fax transmittal memo 7671 # of pages = 3

To <i>A. Hagenshild</i>	From <i>A. Rotman</i>
Co.	Co.
Dept.	Phone #
Fax #	Fax #

TASK	RESPONSIBILITY	KEY MILESTONES	ISSUES/COMMENTS
LETTER OF UNDERSTANDING <ul style="list-style-type: none"> ■ Draft #1 ■ Draft #2 ■ Negotiation ■ Final ■ Signing 	UAI (Ukeles) UAI (Ukeles) Elster & Ukeles Rotman as needed Rotman & CIJE Lay Leaders	10/1 & 10/2 10/15 November December	Link to Local Event
PLANNING GUIDELINES <ul style="list-style-type: none"> ■ Draft #1 ■ Draft #2 ■ Review with community planners ■ Final 	UAI (Meier) UAI (Meier) UAI (Meier)	10/15 11/4 11/18 11/23 & 11/24 11/30	Workshop with Planning Directors
PRESENTATION TO COMMISSIONS <ul style="list-style-type: none"> ■ GA Forum & Event ■ Local events 	Rotman Rotman & CIJE Lay Leaders	11/12 & 11/13	Community-specific events to introduce Project to various publics; Link to Signing
CIJE STAFF COORDIATE <ul style="list-style-type: none"> ■ Executive staff ■ Program Directors 	Rotman Rotman & Elster		Wkly mtgs (Rotman, Elster, Greenfield & Ukeles)
BEST PRACTICES <ul style="list-style-type: none"> ■ Design (inform & access) ■ Inform ■ Access 	Elster, Holtz & Ukeles Elster & Holtz Elster & Holtz		Need to finalize timetable for deliverables and design methods to inform communities and create points of access

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TASK	RESPONSIBILITY	KEY MILESTONES	ISSUES/COMMENTS
COMMUNICATION & PR <ul style="list-style-type: none"> ■ Identify Publics ■ Communications Plan ■ Implement 	Elster ? ?		Use of outside consultant/firm; Assignment of responsibility; Coordination (if any) between Local PR in each community and overall CUE plan
COMMUNITY CONSULTATION ("TALENT BANK") <ul style="list-style-type: none"> ■ Concept Document ■ Assign Responsibility ■ Manage System ■ Locate Individuals ■ Inform Communities ■ Access 	Meier Rotman ? ? ? ?	November early November	Design links to Best Practices
CONTINENTAL/COM PLANNING PROCESS <ul style="list-style-type: none"> ■ Meet with Planners ■ Meet with community lay leaders ("the Seminar") ■ Community planning process 	Ukeles & Elster Rotman & CJE Lay Leaders Elster & Ukeles	11/23 & 11/24 January ongoing	For all: agenda, invites, location, dates
LIASION TO NATL RESOURCES <ul style="list-style-type: none"> ■ IIII. ■ Organizations ■ Denominations ■ Senior Advisors 	Elster	ongoing December	Link to community consultation (talent bank); who pays for what
FINANCIAL RESOURCES <ul style="list-style-type: none"> ■ Nat'l Foundations ■ Local Foundations & individuals 	Naperstek	ongoing	Process for linking local needs definition to foundation interests; funding flow; CUE as recipient; and CJE as broker

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 221388
 NOV 09 10:26 AM '92

TASK	RESPONSIBILITY	KEY MILESTONES	ISSUES/COMMENTS
MONITORING, EVAL, & FEEDBACK <ul style="list-style-type: none"> ■ Introduce field researchers to community ■ Dev feedback loop ■ Set terms for first report 	Rotman Elster & Rotman Gamoran & Goldring Gamoran & Goldring	ongoing late Sept, early Oct October October	Include baseline portrait

NOV 02 04 02:14 PM C17E 221388 PAGE 3

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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Handwritten in red:
?D'PF
Art 08
P17

TELEFAX

To: Annette Hochstein Date: November 9, 1992
From: Arthur Rotman FAX #: 011 972 2 619 951

Number of pages (including this sheet) 1

MESSAGE:

Some time ago we discussed the fact that you will have two of the Jerusalem Fellows join us for the meetings here in November. At the time, I asked for a one or two sentence bio on each. Would you please provide.

Thanks for your prompt revisions to the mailing to the Lead Communities, etc. Material as revised going out immediately.

The plan for November 23 and 24 now calls for six community representatives and to be "trained" by nine of us doesn't sound right. What do you suggest?

Handwritten in red:
Art Agundz
Fred. S. [unclear] + Ruskey

Handwritten in red: S.F.

Mandel Institute

9/11/92
מס' 22

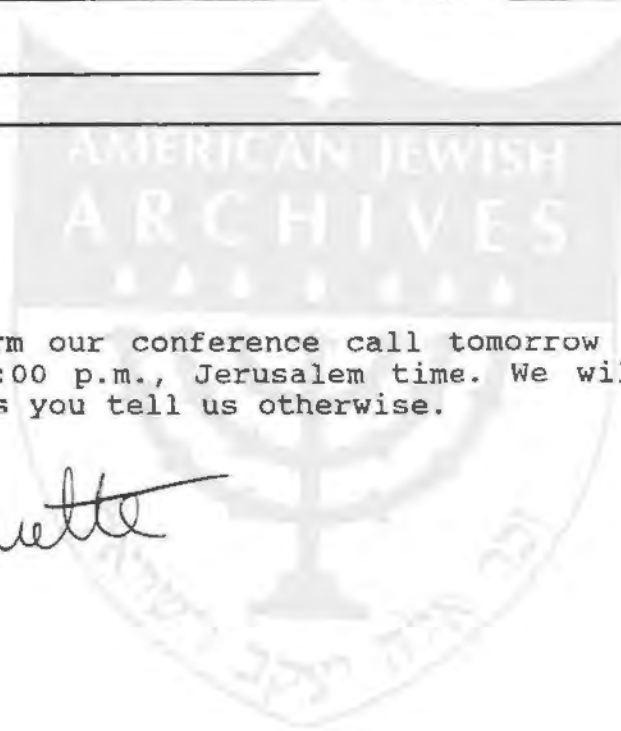
מכון מנדל

Tel. 972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To: Art Rotman	Date: November 9, 1992
From: Seymour Fox & Annette Hochstein	No. Pages: _____
Fax Number: _____	



Dear Art,

This is to confirm our conference call tomorrow at 10:00 a.m., New York time; 5:00 p.m., Jerusalem time. We will call you at your office unless you tell us otherwise.

Best regards,

Annette

9/11/92
א.ר.

Tel. 972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To: Art Rotman Date: November 8, 1992
From: Annette Hochstein No Pages:
Fax Number:

Dear Art,

Following our conversation on Friday I did some planning for the staff meeting of November 19th and 20th and the lead communities meeting of November 23rd and 24th. Here are my thoughts:

The general framework of the meetings should remain as you have planned them, though if the meeting on the 19th could start earlier and/or end later, that could give us much needed time. With minor changes (to accommodate a changed agenda), I recommend that your memo to participants should also go as planned (see exhibits). The major change suggested is the agenda for each of the meetings. Could we discuss them when we speak on the phone? There are also some additions to the participants list which otherwise should not be altered.

I think both of us would be happy if we could conclude this round of meetings with the following outcomes:

1. That the participants understand the lead communities project and the tasks resulting from it (e.g., the idea of focussing simultaneously on several major areas such as personnel; the need to hire 2-3 educators for new positions).
2. That the staff agree on how to present and introduce the project to various actors and actor groups in the community (what do we want lay people, professionals, educators, rabbis to know about the project and how and when do we want to do this).

Exhibit

Draft - 11/3/92
MEMORANDUM

①

To: Friedman
Meyers
Sarnat
(separate memos)

From: Art Rotman

Date: November 6, 1992

Re: Lead Communities: next steps

I envision the following next steps in the Lead Communities process:

1 The Letter of Understanding. By now, you have had a chance to review the draft. Unless I hear from you to the contrary, I am assuming that you foresee no major difficulties from your community's point of view. If you do foresee problems with the dates, I am available to come to _____ [Atlanta, Baltimore, Milwaukee] to help the process along. Please let me know as soon as possible if such a visit is needed.

2 The GA. By now invitations should have been received for the forum on Thursday and the breakfast on Friday.

3 Planners Workshop. We have scheduled a workshop in New York City on November 23d and 24th for your Lead Community planners. This will be a ~~first~~ ^{first} ~~discussion~~ discussion of the Lead Communities Planning process. ~~Additional~~ ^{work plans for the current} additional material will go out before the meeting. ~~Agenda and~~ ^{Agenda and} ~~Year and method for our work together.~~ We envision an "event" in December in your community. We anticipate a format similar to the site visit last spring:

ψ P. 3
4

- A pre-meeting with the lay President of Federation; the Exec; and the Chair of the Lead Communities Committee to discuss overall progress and deal with issues or concerns.
- A meeting with top community lay leadership at which the Letter of Understanding would be signed, and the plans for the year will be discussed.
- A meeting with pros to discuss both planning and educational issues.

You may also want to consider:

5

a community-wide event to which the Jewish educational "stakeholders" are invited

[for Baltimore letter only]

a small meeting with Charles Bronfman and the key local major donors and potential donors to Jewish education.

[for Atlanta letter only]

5 Sometime later this year -- the exact date will have to be built around calendars -- we envision a meeting involving a major CIJE leader (e.g. Mort Mandel) to meet with the most important current and potential local donors.

[for Milwaukee letter only]

5 Sometime later this year -- the exact date will have to be built around calendars -- we envision a meeting involving a major CIJE leader (e.g. Chuck Ratner) to meet with the most important current and potential local donors.

[for Baltimore letter only]

The near future

5 In ~~January~~, we would like to convene lay and professional leadership from each of the three communities with CIJE lay and professional leadership to discuss the project and our progress. We will need to talk soon to clear an appropriate date and to set an agenda.

[for Milwaukee and Atlanta letter only]

The near future

5 In ~~January~~, we would like to convene lay and professional leadership from each of the three communities with CIJE lay and professional leadership to discuss the project and our progress. We will need to talk soon to clear an appropriate date and to set an agenda.

I will be in touch with you in the next few days to review these next steps in our process.

(3)

Draft-11/2/92
MEMORANDUM

To: Steve Gelfand
Marshall Levin
Howard Neistein

From: Jack Ukeles

Date: November 6, 1992

Re: Lead Communities Planning Workshop

~~As you know, we are planning a workshop on November 23 and 24th to focus on the development of Lead Communities Plans. I am writing to share our thinking to date, and to elicit your suggestions for the agenda. If you have any minor comments, please just mark this up and fax it back. If you have major concerns, please give me a call.~~

ready in the workshop

~~The draft agenda includes an 8:30AM "sketch" of each community.~~ We are suggesting that one person from each community take ten to fifteen minutes to touch on the highlights of the community's Lead Communities Proposal, and to share the basic facts about the community. We will circulate a summary of the basic data on the three communities in the packet mailed just before the meeting.

insert to p ①

4

Title: LEAD COMMUNITIES PLANNING WORKSHOP

Purpose: To develop a common approach to Lead Communities Planning and Implementation
The emphasis is on "what ^{and a first year workplan} to do". To the extent possible, we want to identify potential roadblocks to successful ~~planning~~ and devise approaches to eliminating these.

Participants:

- Lauren Azoulai Atlanta
- Steven Gelfand
- Chaim Botwinnick Baltimore
- Nancy Cutler
- Marshall Levin
- Howard Neistein Milwaukee
- Shulamith Elster CIJE
- Sol Greenfield *Art Rotman, Seymour Fox, Shmuel Wygoda*
- Jim Meier *Barry Holtz, Annette Hochstein*
- Jack Ukeles

Location: JCC Association
14th Floor (conference room)
15 East 26 Street (between Madison Avenue and Fifth Avenue)
New York City

Logistics: CIJE will cover costs at the meeting (food and hotel); the community is expected to cover transportation costs. Joanne Schaeffer in our office is handling hotel arrangements. She will be booking a room for each out of town participant in the _____ Hotel on _____ Street. If anyone prefers to make their own arrangements, please let her know as soon as possible.

6/6/92: nsl
~~418~~

Mandel Institute

מכון מנדל

Tel. 972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To: Art Rotman	Date: November 6, 1992
From: Annette Hochstein	No. Pages: 3
x Number: _____	

AMERICAN JEWISH
ARCHIVES

Dear Art,

Unrelated to our conversation of yesterday, I wanted to share two points with you.

1. The letter of understanding:

I have no comments about the body of the text. But I believe that in our conversation overlooking the Mediterranean sea, we mentioned that the appendix should be deleted. If I forgot to mention it then, here is the thought: the appendix is too brief to be useful as illustration, and some of the points invite misinterpretation (e.g. the fourth paragraph). Therefore I recommend that it be dropped.

2. Upcoming staff meeting

Thank you for the confirmation of the staff seminar of November 19 and 20. We here have conducted our own mini-seminar in preparation of that meeting and worked at trying to establish what a first year workplan for lead communities might entail, and flowing from that perhaps what some of the agenda of the staff meeting might include. Here is where we come out:

The first year of work with lead communities should include the following broad elements (I am not relating here to the process: setting up of local mechanism for implementation etc.):

- a. Introduce lead community idea into the community
- b. Prepare plans including:
 - 1. Educational self assessment
 - 2. Lead Community plan (5-year plan)
- c. Year 1 workplan - including:
 - 1. Introduce monitoring, evaluation, feedback project and set up feedback process
 - 2. Implementation of several projects in each of the key areas of endeavor (personnel, community)
 - 3. Launch vision/goals project with particular reference to Monitoring Evaluation and Feedback project.
 - 4. Learning best practices

Here is a very brief elaboration on each:

a. the concept of lead community, the broad idea and its details needs to be introduced thoughtfully to various populations in each lead community so that they know what to expect and what to do (educators, rabbis, lay people, professionals and planners in the community). One of our assignments at the staff meeting would be to discuss how this is going to happen. It would be wonderful if we could, at the end of the meeting, agree on what needs to happen with each of these population groups (e.g. we want to make sure that their needs are addressed, their concerns taken into consideration, their participation in the project specified, the mode of work defined, the benefits likely to accrue to them explained, etc...). We would also decide how to do this (individual meetings, meetings by groups in the lead communities, meetings of all groups at a joint seminar convened by the CIJE, etc.).

b. The second element of this year's workplan is the planning assignment. This includes:

1. The need for the community to study its own educational system, its strengths, weaknesses and needs. For that to happen, the staff must be in a position to offer guidelines and guidance, including on such items as how to conduct an assessment of the educators in the community, whether to introduce achievement tests or not, what sort of inventory of educational opportunities we need and to what level of detail, data on attendance, etc. Preparatory work includes the need to identify elements of such assessment studies that have been undertaken in the Jewish or the general education systems.

2. Preparation of a five-year plan. This would be the outcome of the work of the local mechanism, whatever its form (committee, commission, sub-groups, planner, etc.); together with the joint CIJE-Lead Community seminar. It would include all the elements of plan from the definition of needs and targets, through the implementation plan.


c. Year-1 workplan.

This element has already begun. Let me just illustrate item c.2. In order to keep the momentum, to build on expectations and respond to them, to begin to build the local educational capacity and in order to gain time we would recommend that the CIJE offer for immediate implementation several projects which we know will be required, and for which we need very little lead time. These projects would be in the areas of personnel training and community mobilization (e.g., summer in-service training seminar for lead teachers at each of the training institutions; seminar for program for all day school principals in the lead community; program for all supplementary school principals and all informal settings program directors; training program for all school board members; etc.). These suggestions (of which we would bring many more to the staff seminar) would represent areas of consensus and agreed upon needs.

* * * * *

If the staff seminar end with a better understanding of these items and the way to introduce them and bring them about in the lead communities, we will have advanced the project significantly. I would love to discuss this with you whenever convenient on the phone.

Best regards,


Annette

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

TELEFAX

To: Annette Hochstein Date: November 6, 1992
From: Arthur Rotman FAX #: 011 972 2 619 951

Number of pages (including this sheet) 54

MESSAGE:

1. In view of the fact that Seymour was not available Friday, we will not make any final decisions until the three of us have had a chance to speak together early next week.
2. In the meantime, we have, as you know, invited the planners of the three communities to a meeting on the evening of the 23rd and all day on the 24th. We agreed in our phone conversation that this meeting would proceed. I asked you to develop the program and approach for this meeting. It is entirely in your hands. You will also determine which of the staff you will want with you at those meetings.

We have also scheduled a meeting of the extended staff, including Naparstek, Holtz and Woocher, on November 19 from 3:00 p.m.-7:00 p.m. and Friday the 20th, 9:00 a.m.-12 noon.

We agreed that the documents that you will want to use with the planners should be the subject of the discussion at the meetings on the 19th and 20th. You undertook to develop these documents by either editing what we already have available and/or creating whatever new documents you may find necessary. These documents would, of course, have to be in the hands of our staff several days in advance of the meeting on the 19th which would then call for them being faxed by November 13 the latest.

It is all yours.

3. The Planning Guide to which reference is made in the papers I sent you yesterday is the one that was developed some time ago and I am enclosing a copy.

Looking forward to talking with you and Seymour.

[draft 10-21-92]

Lead Communities Planning Guide
Preliminary Outline of Contents

I. Analysis of needs

A. Profile of current community demographics:

1. General population characteristics: cohort sizes
2. Other Jewish education sub-group sizes (e.g., early childhood, supplementary school, day school, lay leaders, adult education learners, communal service professionals, college-age youth, other special groups)

B. Profile of present Jewish education personnel

1. Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood ...) by institution/program
2. Skills, expertise and background

C. Program capacities and participation rates (formal and informal programs, by institution/program)

D. Estimate of community need/demand (in categories of A2 & B1)

E. Gaps [D - C]

II. Assessment of strengths and weaknesses (What works, what doesn't work)

A. Areas for assessment

1. Students and programs (e.g. levels of attainment)
2. Personnel
 - by program: quality, assets and limitations
 - professional development programs and opportunities
3. Community support
 - Lay involvement and leadership
 - Coordination and collaboration within system
 - Funding: Amounts and participation rates
4. Other system and planning issues (e.g.):
 - Fundraising and allocations
 - Information (system capabilities)
 - Uses of technology

B. Exploratory comparisons (Programs and performance in other places)

III. Strategic issues (confronting and resolving critical choices)

- A. Identify strategic choices
- B. Resolve strategic choices
- C. Develop community-wide mission or vision statement(s)

IV. Establishing strategies and priorities

- A. Formulate strategies
- B. Establish priorities
 - 1. Population groups/program areas
 - 2. Personnel
 - 3. Community support

V. Designing programs (to address priorities)

- A. Initiate program ideas or strategies/preliminary proposals
 - 1. Leadership (lay and professional) and community support (e.g.):
 - coalition building
 - recruitment (of leadership and community involvement)
 - 2. Programs for personnel
 - 3. Programs (e.g.: Israel trips, innovation)
 - 4. Planning and evaluation
 - 5. Financial resources

B. Select program priorities/phasing

VI. Prepare implementation strategy: multi-year framework, first year action program

- A. Program/Task
- B. Responsibility
- C. Cost and funding
- D. Timetable
- E. Performance Management
- F. Program Evaluation

VII. Next Steps: Implementing the plan

- A. First-year action plan oversight
- B. Mid-course modifications
- C. Prepare second-year action plan

APPENDICES

General format for each section

Section heading

Rationale: What the section is about, why it is important, how it relates to the planning process.

Deliverables: Important junctures, or deliverables, and when they must be completed to keep the project on schedule.

Benchmarks: Critical requirements and optional steps/tasks to achieve the benchmarks for the phase.

Methods: "How" to do the task.

Comment Box

For elaborative comments, suggestive hints, or enhancement options.

Point person(s): Recommendations on who should oversee task, and who needs to be involved or have input.

Time guidelines: Approximate minimum/maximum time to set aside to carry out task.

Examples:

Art pr notes
Art Return (ES) '2 0117

PLEASE HOLD THESE DATES

MONDAY, NOVEMBER 23

AND

TUESDAY, NOVEMBER 24

The Council for Initiatives in Jewish Education will host a dialogue in New York with Atlanta, Baltimore, and Milwaukee planners on immediate and long-range plans for the revitalization of Jewish education through its Lead Communities Project.

We will begin with dinner at 6:00 p.m. on Monday and continue till 4:30 p.m. on Tuesday. Please contact Jo Ann Schaffer at (212) 532-1961, if you would like her to make hotel arrangements for you.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128 • New York, NY 10003
Phone: (212) 532-1961 FAX: (212) 213-4078

TELEFAX

TO: Seymour Fox
Annette Hochstein

DATE: November 6, 1992

FROM: Art Rotman

FAX #: 619 452

Number of pages (including this sheet) 1

MESSAGE:

I HAVE ARRANGED A MEETING FOR THE TWO OF YOU, MORT AND MYSELF FOR MONDAY, NOVEMBER 23, BEGINNING AT 9:00 A.M..

REGARDS.

ART

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128 New York, NY 10003
Phone: (212) 532-1961 FAX: (212) 213-4078

TELEFAX

TO: Annette Hochstein **DATE:** November 5, 1992

FROM: Art Rotman **FAX #:** 619 452

Number of pages (including this sheet) 13

MESSAGE:

LET'S DISCUSS THE ATTACHED.

REGARDS.

ART

M E M O R A N D U M

To: Art Rotman
Shulamith Elster
Sol Greenfield

From: Jim Meier 

Date: November 4, 1992

Re: Talent Bank

The attached draft relates to our discussion of Talent Bank at tomorrow's meeting.

You will see that the first page and half is a synopsis of the components of the talent bank, and the numerically corresponding attachments that follow lay out details of each component.

I am working under the assumption that our object is to make the talent bank operational at the latest by the January "seminar." I believe that we have no time to spare if we want to achieve that deadline. (See the timetable in Attachment 7.)

See you tomorrow.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128 • New York, NY 10003
Phone: (212) 532-1961 FAX: (212) 213-4078

TELEFAX

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FROM: Art Rotman **FAX #:** 619 452

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See you tomorrow.

[draft: 11-4-92]

---- for internal discussion only ----

Talent Bank for Lead Communities

Introduction

The talent bank is an allocation and deployment system for directing experts in diverse areas of Jewish education to assist Lead Communities.

The talent bank will provide sources of professional assistance for planning and education to assist the Lead Communities. By mobilizing continental resources and recognizing excellence, the Talent Bank will also contribute to CIJE's long range goal of building the profession of Jewish education.

Consistent with CIJE's role as a catalytic agent for Jewish education, this proposal assumes that resources of existing organizations such as JESNA, JCCA and CAJE will be made available through the Talent Bank.

To meet differing needs of the Lead Communities, Talent Bank members should represent a broad spectrum of approaches and skills. In keeping with CIJE's commitment to quality and independence, the selection process should be fair and comprehensive.

The talent bank is built upon a database of educators, professionals, and others who are expert in diverse areas of Jewish education. A line of credit is provided to each Lead Community to obtain the assistance of these experts. The currency is hours of service. CIJE staff function as loan officers: they watch each account, approve major requests for services, and may recommend that a Lead Community avail itself of a particular expert or an expert of the community's choice in a particular area of expertise.

To become functional, various components of the Talent bank need to be minimally developed, and then expanded upon thereafter. These components, summarized below, are elaborated upon in proposals in the correspondingly numbered attachments to this draft.

Components of the System

1. Areas of expertise: The categories in which expert assistance is likely to be needed. Expertise is grouped in two broad categories: a) "client" expertise, and b) subject or skill expertise. These categories encompass programs (e.g., starting with "Best Practice" areas), curricular areas, as well as specialists in areas of supervision (e.g., training, personnel evaluation), and administration (e.g., budgeting, fundraising, negotiation, systems development).

2. Selection of Experts: This section proposes protocol for identifying and contacting experts about their willingness to assist in this project. The abilities, strengths and limitations of experts in a fairly large number of areas are described according to a standardized and succinct format for entry into the database.

3. Terms of agreement with experts: One or more standard agreements specify the terms for expert participation in this project. Experts may be offered some combination of honorarium, fee, recognition, reciprocal services, or reimbursement of expenses. Differentiated agreements may apply to persons affiliated with national institutions, university faculty, private practitioners, or lay leaders.

4. Resource database and distribution: Define fields, develop database system, enter information, run reports.

5. Allocations: An allocation formula for distribution of hours of service to the three Lead Communities. The formula could combine a series of factors such as: base allotment; size of the community; however, a fixed amount per community is proposed for the immediate future. Incentive for community input or performance; replenishment of hours for achievement of targets or accomplishment of outcomes related to the use of prior experts are issues to be addressed for the future.

6. Management protocols: Delineates set of simple but consistent procedures by which communities initiate requests, indicating when CIJE approval is required, arranging expert visits, tracking and recording outcomes.

7. Calendar: A proposed timetable for making the talent bank operational by the mid January meeting of the lead communities.

Future steps:

- . Elaborate funding formula (see No. 5).
- . Publish Talent Bank directory.
- . Expand to include institutions as well as individuals.
- . Expand to other-than lead communities.
- . Develop ways a community can replenish its "account" other than by new CIJE allocation (e.g. consulting assistance to other communities; developing and/or disseminating curriculum materials to other communities).

Attachment 1

AREAS OF EXPERTISE

(A) Client Expertise		(B) Professional Subject/Skills and Expertise			
Settings of agency and institutional clients	Community Clients (life-span)	Educational Personnel-Clients	Curriculum and Instruction (formal and informal)	Administration and Management	Methods/Skills
Adult residences Camps Central agency College campus College of Jewish Studies Community Supplementary Schools Congregational Schools Federation Israel Programs Libraries Synagogues Youth Groups JCC	<u>Infants-Pre School</u> Early Childhood (N-K) School age (6-18) <u>College age</u> <u>Young Adults/Singles</u> <u>Parents with young children</u> <u>Empty Nesters</u> <u>Mature Adults</u> <u>Senior Citizens</u> Immigrants Mixed Marrieds	Bureau of central <u>agency staff</u> Camp <u>Directors and Staff</u> Center <u>Directors, Program Directors and staff</u> <u>Principals</u> <u>Rabbis</u> <u>Social Workers</u> <u>Specialists</u> <u>Teachers</u>	The Arts Bible Hebrew language Hebrew literature Holidays Holocaust Jewish History Israel Prayer theology Text: Traditional Sources Yiddish Jewish literature Jewish Philosophy Rabbinic literature Mideast Affairs	Administrative Practice Budget Finance Development Facilities Personnel Planning Public Relations Research and Evaluation Systems Development Board Development Demographic Analysis Fund-raising	Curriculum Development Staff Development Leadership Development Program Design Questionnaires School Organization Child Psychology

Attachment 2

SELECTION OF EXPERTS

Criteria

- Recognized expertise in an area of potential value to lead communities.
- Ability to assist (that is, past evidence or reasonable basis for concluding that person can relate and respond to situation other than own).
- Reasonable availability (with respect to time, cost).
- Recommendation by 2 or more reliable sources.

Nomination Process

1. Steering Committee: Talent bank "working" steering committee is formed consisting of easily convenable members, e.g.:

- Shulamith Elster, chair
- Sol Greenfield
- John Woocher
- 1 or 2 senior advisors who know schools and programs
- Barry Holtz
- Judith Ginsberg
- Jack Ukeles or Jim Meier

2. Solicit Nominations: The Chief Education Officer, with the assistance of other CIJE staff and consultants, sends letter including sets of nomination forms to specific contacts in national agencies, training institutions, lead communities, principals of selected day and supplementary schools, JCC and camp directors, foundation officers, etc.

Short and easy nomination form would ask:

4. Invitations:

- Steering committee reconvenes to decide on names: a) proceed with invitation, b) maybe, more information needed, c) no.
- Chief Education Officer, or delegate, contacts selectees about willingness to serve on Talent Bank, and if so, for more information (see below).
- Phone invitation, followed by standard letter, covers:
 - . Purpose of talent bank
 - . Obligations/responsibilities of experts
 - . Committee's perception of nominee strengths
 - . Talent bank listing
 - . Compensation for services
 - . Follow-up information/profile required from expert

Follow-up letter will also include information on:

- . Training and support (none contemplated)
- . Reporting (if contemplated)
- . Standard contract (see attachment 3)

5. Expert Profile:

- Expert asked to submit the following information:
 - . Resume
 - . Talent bank description for data bank

Attachment 3

TERMS OF AGREEMENT

1. Compensation Scale:

All travel and other reasonable expenses reimbursed and, unless circumstances dictate otherwise, the following compensation scale:

Private practitioner	\$350 preparations, reading, phone calls 500/day 400 for follow-up/reporting
Staff of national umbrella organization	\$400 honorarium
Educator in training institution/school	400 honorarium 400 to institution for released time
Lay leader	

[Note: Two-day visit to out-of-town location will cost \$1,500 to \$3,000, depending on distance and selection. Comes out to about 10 - 15 trips per site, at \$30,000/community.]

2. Non-Solicitation: Expert agrees not to contact community with the purpose of selling his/her services, nor to promote self in conversations with the community.

3. Community Selection of Experts: CIJE Talent Bank reserves the right to make final approval of any consulting request by a community.

Communities may contact experts directly as they review credentials and/or consultant approach to community's specific need.

Attachment 4

RESOURCE DATABASE, and DISTRIBUTION

Set Up Systems

1. Hire systems consultant to identify software, set up talent bank expert database (e.g., sortable by variety of descriptors), and set up management tracking systems for accounts.
2. Secretary enters information into talent bank.
3. Printout and review profiles of experts.
4. Distribute first installment of talent bank to lead communities.

Update/Maintain Systems

5. Add new expert profiles to talent bank as they are identified.
6. Track talent bank use, including withdrawals by lead communities, and use of experts.

Plan, Prepare, and Issue Directory

7. Prepare glossier document that explains talent bank and includes profiles of resource experts.

Directory

8. The directory will make the results of the search available to a larger audience. This product could be one or both of two forms: a computer disk or an 8 1/2" x 11" loose-leaf notebook with two sections: reference indexes and member profiles listed alphabetically by name. Cross indexes will list the names of resource people by specialty or specialties in a variety of areas reflecting the categories of the Talent Bank database.

Attachment 5

ALLOCATIONS and Talent Bank BUDGET

1. Community Allocations: 25 - 30 days of consultants	\$35,000	\$105,000
2 The Talent Bank, including database (first year, set-up)		
• Part-time coordinator (1.5 days/week, 8 months)	8,000	
• Part-time clerical (1.5 days/week, 8 months)	5,000	
• Benefits for part-time staff	3,000	
• Hardware and software	4,000	
• System consultant	7,000	
• Miscellaneous	3,000	30,000
3. Other direct expenses		
• Mailing, copying, communications	5,000	
• Meetings, travel	2,500	
• Printing and publication of talent bank	2,500	
• Design and set-up reporting/evaluation plan	5,000	15,000
		<hr/>
TOTAL:		\$150,000

Attachment 6

MANAGEMENT PROTOCOLS

Summary of Process

1. Talent Bank Profiles: CIJE issues profiles on available experts to Lead communities.
2. Pre-Approval: Lead community contacts CIJE program officer by phone to discuss need for expert assistance in specific area. Community indicates:
 - Reasoning behind identification of this area of need.
 - How need relates to community priorities or action plan.
 - What is desired from expert, objectives to be accomplished.
 - Whether they have specific person in mind.
 - How many days of expert are needed; what is agenda.
 - What expert needs to know in advance of visit.

CIJE gives concept approval to plans of community, and suggests particular experts if desired.

3. Community Engages Expert: The community directly contacts one or more Talent Bank experts, selects the one(s) it considers most fitting, settles dates and logistics, forwards any appropriate background materials to the expert, and alerts CIJE about finalized plans.
4. Expert visits community.
5. Expert sends receipts to CIJE for reimbursement.
6. Evaluation: Community completes and forwards to CIJE short evaluation form on effectiveness of expert.

Talent Bank Account

Each lead community is issued a talent bank account with an initial value equal to their CIJE allocation (proposed at \$35,000 per community).

As experts are engaged, the community's balance is reduced accordingly.

(A future task will be to develop ways for the community to replenish its account other than by a new CIJE allocation. E.g., consulting assistance to other communities; developing and/or disseminating curriculum materials to other communities.)

[Issue: The account currency can be dollars or units of service. In the latter case, CIJE would estimate the average value of a consultant visit and translate that into days. An initial projection is \$2000/visit, or \$1,000/day -- see Attachment 3. Providing a dollar value rather than a service unit equivalent would give the communities more incentive to exercise scrutiny in controlling costs (e.g. hotels) and therefore is recommended.]

CIJE Management Roles

CIJE plays several roles in managing the account:

1. Acts as Program Officer:

- May, based on monitoring reports or other knowledge of community, urge community to obtain assistance of a particular expert.
- Approves of "withdrawals", meaning approval of the use of an expert.
- Receives report from expert following visit .

[Issue: Is reporting necessary and desirable? How would CIJE use report? Would this step inhibit role expert plays with respect to community? Recommend scrapping this item.]

2. Administers and monitors account spending:

- Issues payment to expert for honoraria and expense reimbursement.
- Keeps record of account balance and issues periodic (e.g. 2 times/year) balance reports, or upon request.

Program Officer Role

CIJE will assign a program officer to each community. The program officer is authorized to approve Talent Bank assignments.

[Issue: This oversight role can be carried out by a) the Chief Education Officer, by b) two or more CIJE staff and consultants assigned to work with a specific community, or by c) the steering committee. Whether a) or b) is preferable depends primarily on the vision of CIJE's ongoing work with a community: Is there a need for someone from CIJE to develop a close working relationship with each community? The last alternative is not recommended since fast decisions may be desired.]

Attachment 7

TIMETABLE FOR LAUNCHING TALENT BANK

<u>Pressing Tasks</u>	<u>Completion date</u>
0. Preliminaries <ul style="list-style-type: none"> . Approve overall plan . Hire p-t coordinator and clerical help (See 4. Allocations and Budget) 	mid Nov.
1. Define areas of expertise	end Nov.
2. Select experts: first round <ul style="list-style-type: none"> . Set up steering committee . Solicit nominations . Review initial nominations . Invite experts . Obtain profile information from experts 	mid Nov. late Nov. early Dec. mid Dec. late Dec.
3. Terms of agreement <ul style="list-style-type: none"> . Develop standard agreement . Send to experts following acceptance 	early Dec.
4. Systems/database <ul style="list-style-type: none"> . Hire consultant . Set up system . Data entry . Distribute listing 	late Nov. late Dec. early Jan. mid Jan.
5. Allocations and Budget <ul style="list-style-type: none"> . Decide on budget . Identify/hire p-t coordinator . Identify/hire p-t clerical . Announce allocations to LCs 	asap early Dec. late Dec. early Jan.
6. Management Protocols <ul style="list-style-type: none"> . First draft . Final draft . Distribute 	late Nov. late Dec. mid Jan.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATIONMailing Address: 163 Third Avenue #128
Phone: (212) 532-1961New York, NY 10003
FAX: (212) 213-4078**TELEFAX****TO:** Annette Hochstein **DATE:** November 5, 1992**FROM:** Art Rotman **FAX #:** 619 452Number of pages (including this sheet) 7

MESSAGE:


LET'S DISCUSS THE ATTACHED.

REGARDS.

ART



To: Art Rotman

From: Jack Ukeles 

Date: November 3, 1992

Re: att'd

cc: Shulamith Elster
Sol Greenfield
Jim Moier

=====

I am enclosing a draft memo from you to the Execs on calendar and a draft memo from me to the Planning Directors about the Workshop on November 23 & 24 (to be enclosed with the first memo).

I assumed that you would only participate in the evening session and not participate in a formal way on the 24th since the Federation Execs will not be present; which is why I didn't list you for any sessions. This will leave you free to come in or not as your day develops. If you are planning to spend the day, you should be on the program. Please advise and I will adjust accordingly.

I also assumed that Sol would not play a role in leading any sessions. Please advise if that is correct.

We can use this draft as the basis for our discussion on Thursday, and I can fax it to the communities on Friday.

Draft - 11/3/92
M E M O R A N D U M

To: Friedman
Meyers
Sarnat
(separate memos)

From: Art Rotman

Date: November 6, 1992

Re: Lead Communities: next steps

=====

I envision the following next steps in the Lead Communities process:

- 1 The Letter of Understanding. By now, you have had a chance to review the draft. Unless I hear from you to the contrary, I am assuming that you foresee no major difficulties from your community's point of view. If you do foresee problems with the dates, I am available to come to _____ [Atlanta, Baltimore, Milwaukee] to help the process along. Please let me know as soon as possible if such a visit is needed.
- 2 The GA. By now invitations should have been received for the forum on Thursday and the breakfast on Friday.
- 3 Planners Workshop. We have scheduled a workshop in New York City on November 23d and 24th for your Lead Community planners. This will be a "nuts and bolts" discussion of the Lead Communities Planning process. A draft agenda is enclosed; additional material will go out before the meeting.
- 4 We envision an "event" in December in your community. We anticipate a format similar to the site visit last spring:
 - A pre-meeting with the lay President of Federation; the Exec; and the Chair of the Lead Communities Committee to discuss overall progress and deal with issues or concerns.
 - A meeting with top community lay leadership at which the Letter of Understanding would be signed, and the plans for the year will be discussed.
 - A meeting with pros to discuss both planning and educational issues.

You may also want to consider:

a community-wide event to which the Jewish educational "stakeholders" are invited

[for Baltimore letter only]

a small meeting with Charles Bronfman and the key local major donors and potential donors to Jewish education.

[for Atlanta letter only]

5 Sometime later this year -- the exact date will have to be built around calendars -- we envision a meeting involving a major CIJE leader (e.g. Mort Mandel) to meet with the most important current and potential local donors.

[for Milwaukee letter only]

5 Sometime later this year -- the exact date will have to be built around calendars -- we envision a meeting involving a major CIJE leader (e.g. Chuck Ratner) to meet with the most important current and potential local donors.

[for Baltimore letter only]

5 In January, we would like to convene lay and professional leadership from each of the three communities with CIJE lay and professional leadership to discuss the project and our progress. We will need to talk soon to clear an appropriate date and to set an agenda.

[for Milwaukee and Atlanta letter only]

6 In January, we would like to convene lay and professional leadership from each of the three communities with CIJE lay and professional leadership to discuss the project and our progress. We will need to talk soon to clear an appropriate date and to set an agenda.

I will be in touch with you in the next few days to review these next steps in our process.

D r a f t -11/2/92
M E M O R A N D U M

To: Steve Gelfand
Marshall Levin
Howard Neistein

From: Jack Ukeles

Date: November 6, 1992

Re: Lead Communities Planning Workshop

=====

As you know, we are planning a workshop on November 23 and 24th to focus on the development of Lead Communities Plans. I am writing to share our thinking to date, and to elicit your suggestions for the agenda. If you have any minor comments, please just mark this up and fax it back. If you have major concerns, please give me a call.

The draft agenda includes an 9:00AM "sketch" of each community. We are suggesting that one person from each community take ten to fifteen minutes to touch on the highlights of the community's Lead Communities Proposal, and to share the basic facts about the community. We will circulate a summary of the basic data on the three communities in the packet mailed just before the meeting.

Title: LEAD COMMUNITIES PLANNING WORKSHOP

Purpose: To develop a common approach to Lead Communities Planning.

The emphasis is on "how to do it". To the extent possible, we want to identify potential roadblocks to successful planning and devise approaches to eliminating these.

Participants:

- Lauren Azoulay Atlanta
- Steven Gelfand
- Chaim Botwinnick Baltimore
- Nancy Cutler
- Marshall Levin
- Howard Neistein Milwaukee
- Shulamith Elster CIJE
- Sol Greenfield
- Jim Meler
- Jack Ukeles

Location: JCC Association
14th Floor (conference room)
15 East 28 Street (between Madison Avenue and Fifth Avenue)
New York City

Logistics: CIJE will cover costs at the meeting (food and hotel); the community is expected to cover transportation costs. Joanne Schaeffer in our office is handling hotel arrangements. She will be booking a room for each out of town participant in the _____ Hotel on _____ Street. If anyone prefers to make their own arrangements, please let her know as soon as possible.

Program

Monday, November 23

6:00PM	Welcome Workshop Introduction	Art Rotman Jack Ukeles
8:30PM	Dinner	
7:30PM	Towards Systemic Change In Jewish Education The Genesis of the Lead Communities Concept	Seymour Fox Annette Hochstein
9:00PM	Open Discussion of the Lead Communities Project	Shulamith Elster

Tuesday, November 24

8:00AM	Coffee	
8:30AM	Review of Lead Communities Planning Calendar	Jack Ukeles
9:00AM	A sketch of each Lead Community as a context for improving Jewish education	
	<ul style="list-style-type: none"> • Atlanta • Baltimore • Milwaukee 	<hr/> <hr/> <hr/>
10:30AM	A Portrait of a Lead Community (Plan)	Shulamith Elster
11:30PM	Planning Guide	Jim Meier
12:30	Lunch	
1:30PM	Connections	
	<ul style="list-style-type: none"> • Introducing Best Practices • The Talent Bank • Continental Educational Resources • Continental Financial Resources 	Barry Holtz Jim Meier Shulamith Elster Shulamith Elster
3:00	Issues	Jack Ukeles
	<ul style="list-style-type: none"> • Toward a common language: what do we mean by "improvement"; "system"; "settings" "populations" "and "programs" • How should the CIJE staff interact with the Community staffs • When should we work as a foursome and when as a set of doubles? • Where in the process it makes sense to have a community-specific approach and where it makes sense to have a general North American Approach. • Agenda: Timing and content of Meeting in January with execs and lay leadership 	
4:30	Adjournment	

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128 • New York, NY 10003
Phone: (212) 532-1961 FAX: (212) 213-4076

TELEFAX

TO: Annette Hochstein **DATE:** October 2, 1992

FROM: Shulamith Elster **FAX #:** 619 452

Number of pages (including this sheet) 8

MESSAGE:

FOR YOUR INFORMATION...FROM MY OCTOBER 14 MEETING IN MILWAUKEE WHICH WAS MY SECOND VISIT SINCE THEIR SELECT ON.



MILWAUKEE JEWISH FEDERATION

: 9 0 2 - 1 9 4 2

AGENDA

Jewish Education Task Force
October 14, 1992
5:45 p.m.

- I. Lead Community Project - "Letter of Agreement"
- II. Planning System for Jewish Education
- III. Program Coordinator

Principles of the Letter of Understanding Between CIJE and Milwaukee as a "Lead Community"

I. How Will CIJE Be Staffed?

CIJE is a catalytic agent for change in Jewish education. The board consists of the leadership of national organizations, foundations, and key resources in Jewish Education. It is staffed by an Executive Director, a Chief Education Officer and a Planning Director. The Chief Education Officer and Planning Director serve as a team that will consult and work with "Lead Communities" as they proceed in developing their strategic plans to benefit Jewish Education. In addition, CIJE employs three field researchers that will document the process of change in each community and to report progress back to local leadership as well as national sponsors. One of the three field researchers will be deployed in each of the "Lead Communities".

II. Components of the "Letter of Understanding"

- A. The "Lead Community" Project is a collaborative effort between the CIJE and three local communities. It is premised on the assumption that the best way to maximize improvement in Jewish Education continentally is to demonstrate success at the local level.
- B. CIJE's agreement with the "Lead Communities" is for three years. The first year will be dedicated to planning with the outcome consisting of:
 - 1. A five year plan for Jewish Education. The content of each plan should include mission or vision statements, a needs assessment, an articulation of program priorities and a strategy for developing human and financial resources for Jewish Education.
 - 2. A minimum of one program initiative to be undertaken in the spring of 1993.
 - 3. An implementation plan for the year 1993/94.
- C. CIJE's Responsibilities
 - 1. CIJE will bring to each community the results of its "Best Practices" project which is a systematic effort to collect what is working well around the country in the field of Jewish Education. It will be organized by program area.

Page 2

2. CIJE will provide a roster of experts and will pay for their work with and in Milwaukee as needed. (Preliminary estimate of value, about \$30,000 to \$40,000 per community in the first year.)
 3. CIJE is not a Foundation. However, CIJE will introduce "Lead Communities" to national foundations that have expressed an interest in Jewish Education and help advocate for grant funds to support program initiatives.
 4. CIJE will coordinate the assistance from national organizations and training institutions to "Lead Communities" as needed.
 5. CIJE will fund the field researcher component of the project to monitor the process of change and report back progress to communities approximately three times a year.
- D. Responsibilities of Milwaukee As A "Lead Community"
1. Each "Lead Community" will establish a committee of top community leadership to direct the project including a "wall to wall" coalition of institutions and religious movements and agencies.
 2. Each community will develop a planning system that draws input from a broad base of education stakeholders. The planning system should allow for meaningful participation by all segments including teachers and parents.
 3. Each community will identify and/or hire a lead staff person to assist in the design and development of the planning process and to manage the project.
 4. Each "Lead Community" will utilize the "Best Practices" project.
 5. Each community will develop one pilot project in 1993 to demonstrate that progress is being made.
 6. Each community will significantly expand resources available to Jewish Education. These resources may evolve from private foundations, endowment development, Campaign allocation or any combination of the above.

Page 3

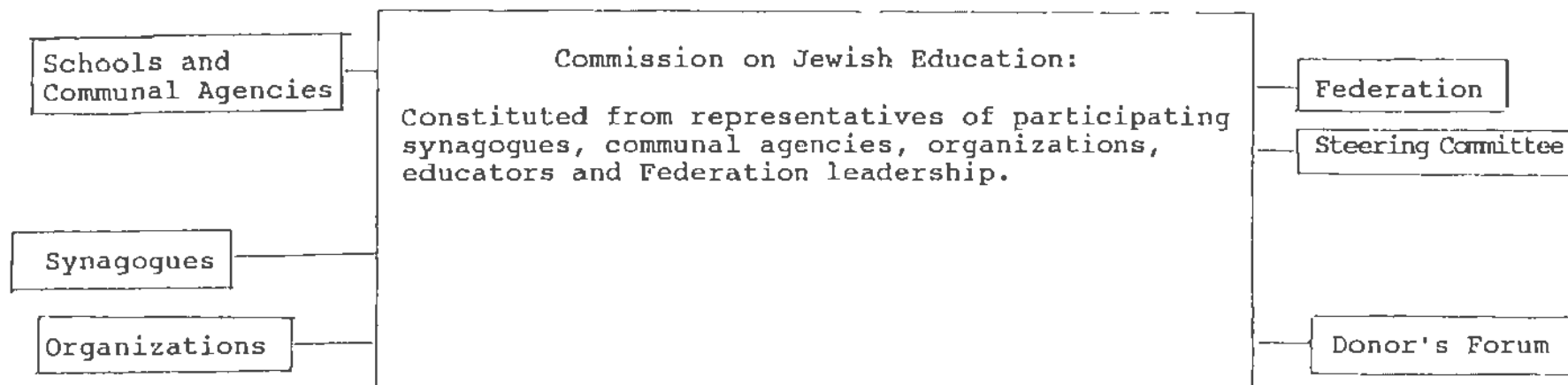
7. Each "Lead Community" agrees to monitor and evaluate its progress utilizing the field research team.
8. Each "Lead Community" will work with CIJE to disseminate information that is learned in the planning process to other communities around the country.

III. Timeline

- A. Presentation of basic principles of the "Letter of Agreement" to Jewish Education Task Force - October 14.
- B. Discussion and action by Federation Board of Directors - October 27.
- C. Assuming Milwaukee agrees to participate in the "Leads Project", a reception for all "Lead Communities" will be held at the General Assembly in New York - November 12.
- D. Meeting/Seminar for "Lead Community" planning staff - late November.
- E. Begin process of involving education stakeholders in the "Leads Project" through a scheduled event/activity - December or January.

HN/nm
Rev. 10/6/92

Proposed Model for Jewish Education Planning



- Task Groups on Substantive Issues
1. To extend Jewish learning beyond the Bar/Bat Mitzvah age groups through effective utilization of formal and informal education resources (e.g. through adult education, family education opportunities for teens and young adults).
 2. To reduce financial barriers which limit participation in Jewish Education activities.
 3. To increase recruitment, training and retention of qualified personnel in all settings where Jewish Education takes place.
 4. Maximizing the effectiveness of Jewish Education as a key vehicle for Jewish continuity through joint planning and broad participation of agencies and synagogues.

Models for Education Planning: General Findings From Select Communities That Have Initiated, Or Are In the Process Of Creating, A Broad Based System Of Planning For Jewish Education

The following is a listing of general themes that were elicited through a survey of six (6) communities that have recently been involved with developing a community-wide planning system for Jewish Education. Those communities include Baltimore, Atlanta, Columbus, Cleveland, St. Louis and Syracuse.

1. All systems were initiated through the Federation. However, ultimate success depends upon ownership by a broad consortium of education stakeholders.
2. All systems maintain planning for Jewish Education structurally linked in some way to the Federation's planning and allocation committees.
3. While each system has been structured to incorporate broad input and participation, it does not take the place of individual agencies pursuing objectives that fall within their current mission. The planning system needs to be sensitive to these missions and the ongoing operational needs of participating agencies and synagogues.
4. Composing these broad based commissions has been both approached through having organizations designating representatives and through the Federation selecting members that reflect a broad spectrum of the community. In those cases when the majority of the commission members were organizational representatives, the Federation often appointed a steering committee to frame the commission's agenda and coordinate its activities. Again, the composition of the Steering Committee (12-15 people) should reflect a broad spectrum of perspectives.
5. Each system utilizes sub-committees and task forces to address substantive issues rather than attempting this process through the commission as a whole. This has also been a more effective means of involving professional and educators than creating a separate educators advisory counsel.
6. The broad commission serves as a forum for priority setting, policy development, exchange of information, planning coordination and reviewing the recommendations of each task force.
7. These systems must be adequately staffed. Attention should be given to available staff support when creating the planning system.

Page 2

8. Consideration should also be given to the strength and time that can be devoted by community leadership when deciding the number of subcommittees to be created.
9. The development of a broad community planning system under the framework of the Federation has often paralleled, and in some cases has emerged from, transitions in the community's Central Agency for Jewish Education.
10. Integral to each system is a strategy to develop funds beyond what is available to the general Campaign.

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Page 1

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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TELEFAX

TO: Seymour Fox
Annette Hochstein

DATE: October 2, 1992

FROM: Art Rotman

FAX #: 619 452

Number of pages (including this sheet) 9

To: Arthur Rotman

September 15, 1992

From: Annette Hochstein

Dear Art,

Re: CIJE - Workplan

Following his conversation with you Seymour suggested that a somewhat expanded workplan for the CIJE - with an emphasis on Lead Communities might be useful at this time.

The document reflects the Commission's recommendations, some of which have not yet been addressed or have been addressed in a limited way (Building the Profession; developing a research capability; addressing the Community support issue)

It may be useful to read the document together with the document "Lead Communities at work", and the attached very drafty timeline (both appended).

I hope this is useful and am of course available for any clarification or for further details.

Best Regards,

Annette



THE CIJE -- PRELIMINARY WORKPLAN

1992/1993

A. Function, structure and staffing assumptions

The following assumptions guide this plan:

a. The function of the CIJE is to do whatever necessary to bring about the implementation of the Commission's decisions. This includes initiating action, being a catalyst and a facilitator for implementation. The CIJE is not a direct provider of services.

b. The CIJE is a mechanism of the North American Jewish Community for the development of Jewish education. Optimally an increasing number of leaders would see it as their organization for purposes of educational endeavors.

c. It will always be a small organization with few staff and high standards of excellence. We assume that its staff will include, in addition to the executive director and an administrative support staff, a planner and a chief education officer as well as possibly some addition staff with content expertise.

d. The plan is based on the assumption that the assignment includes fundraising for the CIJE and for the CIJE's contribution to Lead Communities.

B. Establishing Lead Communities

The bulk of the CIJE's work for this coming year, will be the pro-active efforts required to establish lead communities, to guide them and guarantee the content, the scope and the quality of implementation, and to help raise the necessary funds for the CIJE's share in their work, as well as for the Lead Communities themselves (the CIJE's role in funding was debated at the August meetings -- I am not sure that this formulation accurately reflects the debate).

C. Elements of the workplan for Lead Communities

Immediate: Preparation, negotiations and launch

1. Prepare written guidelines for Lead Communities (LC), including proposed agreement, planning guidelines, description of the project and of the CIJE's support role.

(1)

2. Prepare CIJE staff for the assignment with LC's and have periodic staff meetings for ongoing work. Items 1 and 2 involve further preliminary development of the concept of Lead Communities, its translation into specific content and practice.

3. Offer ongoing guidance and backing to the two support projects: Best Practices and Monitoring, Evaluation, Feedback.

4. Launch the dialogue with lay and professional leadership in each LC towards an understanding of the broad lines of the project, an agreed upon process for the project and the formulation of an agreement or contract. The chronology is to be determined. In particular we discussed the question of whether we ought to push for rapid, written agreement, or rather engage in a joint learning process that would lead to agreement when the Communities are more knowledgeable. Whatever the decision, the dialogue with communities would revolve around the concept of Lead Community, the terms of the project, the planning and decision-making process, the relationship with the CIJE - including funding and the two projects.

5. Work with educators and rabbis in the community: they usually have strong views, commitments and expectations on which we will want to build.

6. Convene an ongoing (monthly?) planning seminar of the Lead Communities and the CIJE to further develop and design the concept of LC's. Given the innovative and experimental nature of the project much needs to be worked out jointly, with the best available talent joining forces for the design and planning work. This will also provide a basis for networking among LC's.

The character of the first meeting, to be convened as soon as possible, is yet to be determined (e.g. should it be a major meeting aimed at socializing, acquainting, familiarizing the leadership (lay and professional) with the ideas, staff, actors, projects, foundations, related to the CIJE, or should it be a smaller meeting of several representatives of each community and of the CIJE (see appendix B for possible scenario).

7. Set up the various expert contributions of the CIJE:

a> Provide planning guidance and guidance for the community mobilization process (Community organization and ongoing troubleshooting). Prepare guidelines and discuss them with the communities. Assist as needed in the establishment of a strong planning group (committee, commission) with wall-to-wall representation.

b> Negotiate with foundations, organizations and purveyors of programs the nature of their involvement and their contribution to Lead Communities. Begin training them for the assignment (e.g. discuss the institutions of higher Jewish Learning their role in in-service and pre-service training, as well as their role for

the articulation of visions or goals of Jewish education; work with the JCCA, JESNA, CAJE, CLAL; approach program-oriented foundations with specific programs). This requires preparing background documents - for example what would the Israel experience be in a Lead Community - and discussing with the appropriate organization or foundation their interest in taking all or part of the program upon themselves.

c> Provide funding facilitation as required.

d> Provide planning guidance for:

- 1> The self-study
- 2> The one-year plan
- 3> Pilot projects to be launched in year 1
- 4> The five-year plan

e> Complete plans for the introduction of the Best Practices project into the community and make educational consultants available to the communities.

f> Introduce the monitoring and evaluation project in the community (field researchers to conduct preliminary interviews) and help process the findings of the periodic reports (first one in January 1993).

g> Provide guidance for the development of vision, mission, goal-statements at institutional and community levels.

h> Appoint a key staff consultant for each community, to mediate the content (community mobilization; building the profession) and make educational consultants available for specific needs (e.g. develop in-service training program for early childhood educators; re-invent a best-practice supplementary school model into the community).

i> Develop networking between communities

j> Develop means of communications and p.r.

8. Toward the end of the year: gear up towards implementation

Ongoing Work -- general CIJE and related to Lead Communities

- 1) Board Meetings (August and February), Executive group, Board Committees (Lead Communities, Monitoring/Evaluation, Best Practices) and camper assignments
- 2) Senior Advisory group meetings or conference calls
- 3) Monthly CIJE-Lead Communities planning seminar
- 4) Fundraising

- 5) Ongoing contacts with constituencies (organizations, purveyors of programs, foundations lay leaders, educators, rabbis)
- 6) Staff meetings (for planning and discussion of educational content: twice a year
- 7) Guidance to key projects
- 8) Networking with educators, organizations and institutions.
- 9) Plan the second and third years of the project.

C. Beyond Lead Communities:

Major areas of endeavor of the CIJE and suggested action in each area for the next 12 months (please note: areas 1,2, and 3 below must be dealt with both at the continental level and in Lead Communities) :

.. Community Mobilization and communications

Plan and launch the activities that will help mobilize communities, organizations and leaders to Jewish education and create more fertile grounds for access to the resources required (beyond the three communities selected). Areas of endeavor might include:

* work with the 23 applicant communities to the Lead Communities project (or with any differently defined large group of communities) to capitalize on good will, initial interests, local initiatives. This should initially include a very limited number of activities -- until the CIJE's workload permits more. For example, during the coming year one might convene once or twice representatives of the communities to share with them two topics: findings of the Best Practices project and methodology of the Monitoring, Evaluation Feedback project and meeting with programs and representatives of programmatic foundations (CRB for Israel; Melton for the adult mini-school; Revson for media; etc...)

* launch a communications program that will continue the work begun with the publication of "A Time to Act".

In too many quarters the work of the CIJE is not known. This limits our effectiveness, particularly with reference to fundraising, and misses on important opportunities for community mobilization.

This area has not yet been planned and very limited work was done to date.

2. Building the Profession of Jewish education

In order to deal with the shortage of qualified educators a thoughtful plan needs to be prepared concerning action required at the central or continental level. We have deferred dealing with issues such as a portable benefits plan, salary policies; what would it take to meet the shortage of qualified personnel in terms of both pre-service and in-service training (beyond the grants to the training institutions) etc...In the course of the current year we may want to begin the planning the work. (I believe this requires initially an in-house or commissioned planning piece).

3. Developing a Research capability

Two steps were taken so far: the development of two major research projects to support the development effort in Lead Communities (Holtz and Gamoran) and the preparation of a background paper by Dr. Isa Aron. We have not yet found financial support for this project.

4. Establishing Lead Communities (see above).

Fall Seminar -- Some Suggestions

An event to start work, inform, set the terms, create the dialogue.

The components might include:

1. General meeting of CIJE and lead community representatives re-the project in general and CIJE contribution. Includes CIJE and Lead Community Lay leadership. (10-20 people per community plus CIJE staff and consultants, as well as lay people for part of the meetings)

a. Communities introduce themselves, their views, hopes, ideas, past achievements, etc..

b. The CIJE introduces the present state of the Lead Community idea -- its evolution from the Commission to today. The notion of these communities as spearheads for systemic change -- for addressing the problems of Jewish education/continuity.

2. Lay leaders to lay-leaders -- issues of funding and community mobilization

3. Vision and goals: presentation and discussion followed by work with representatives of the training institutions and others who will be leading this effort.

4. Professionals, educators, rabbis: build upon their work, commitments, convictions.

a. discussion of the project, the process, getting to work

b. The Best Practices project: presentation and discussion-- includes consultants on content

c. Monitoring, Evaluation and Feedback :same

d. Planning :

- self study
- pilot projects
- one year plan
- five year plan

-- The ongoing CIJE seminar

5. networking among Lead Communities

6. Meetings with organizations, purveyors of programs and Programmatic Foundations: -- to discuss specific interests and projects:

- in-service training programs
- CAJE

- JESNA
- JCCA
- the Melton mini-school
- the CRB Foundation
- etc..

7. Closing session and discussion of next steps

Appendix 1

CIJE -- Workplan -- Draft

Task Name	Start	End	1992				1993											
			Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	D
Lead Communities	15/Sep/92	02/Sep/93	[Task bar]															
Launch Activities	15/Sep/92	02/Sep/93	[Task bar]															
Prepare written guidelines	15/Sep/92	20/Oct/92	[Task bar]															
Written agreement	15/Sep/92	30/Sep/92	[Task bar]															
Planning guidelines	15/Sep/92	20/Oct/92	[Task bar]															
Negotiate Agreement	15/Sep/92	30/Nov/92	[Task bar]															
Present project to Community	15/Sep/92	01/Dec/92	[Task bar]															
CIJE staff preparation	15/Sep/92	01/Dec/92	[Task bar]															
Launch Monitoring	15/Sep/92	26/Aug/93	[Task bar]															
Introduce in community	15/Sep/92	25/Sep/92	[Task bar]															
Develop feedback loop	15/Sep/92	30/Nov/92	[Task bar]															
Set terms for first report	15/Sep/92	27/Nov/92	[Task bar]															
Feedback from findings	19/Jan/93	26/Aug/93	[Task bar]															
Launch Best Practices	15/Sep/92	02/Sep/93	[Task bar]															
introduce	15/Sep/92	30/Nov/92	[Task bar]															
develop method	15/Sep/92	02/Sep/93	[Task bar]															
provide consultants	15/Sep/92	02/Sep/93	[Task bar]															
Vision project	15/Sep/92	31/Aug/93	[Task bar]															
develop project	15/Sep/92	31/Aug/93	[Task bar]															
work with IHJL etc..	15/Sep/92	26/Aug/93	[Task bar]															
introduce in communities	16/Nov/92	26/Aug/93	[Task bar]															
Convene first planning seminar	01/Dec/92	01/Dec/92	[Task bar]															
Community process	15/Sep/92	26/Aug/93	[Task bar]															
Work with educators, rabbis	15/Sep/92	27/Aug/93	[Task bar]															
Planning guidance	15/Sep/92	26/Aug/93	[Task bar]															
Self study	06/Nov/92	30/Apr/93	[Task bar]															
First year plan	15/Sep/92	31/Dec/92	[Task bar]															
Pilot projects	08/Feb/93	08/Feb/93	[Task bar]															
Five year plan	01/Dec/92	26/Aug/93	[Task bar]															
Work with foundations	15/Sep/92	26/Aug/93	[Task bar]															
Work with program purveyors	15/Sep/92	26/Aug/93	[Task bar]															
Work with national organizations	15/Sep/92	26/Aug/93	[Task bar]															
Funding facilitation	15/Sep/92	26/Aug/93	[Task bar]															

CIJE -- Workplan -- Draft

Task Name	Start	End	1992				1993											
			Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	D
Appoint staff consultant	15/Sep/92	15/Sep/92	△															
Develop Networking between communiti	01/Dec/92	01/Dec/92				△												
Communications and pr	15/Sep/92	26/Aug/93																
Gear up towards implementation	10/Aug/93	10/Aug/93																△
Ongoing	15/Sep/92	02/Sep/93	△															
Fundraising	15/Sep/92	26/Aug/93																
Board meetings	14/Feb/93	14/Feb/93																△
Board Committees	15/Sep/92	15/Sep/92	△							△								△
Executive Committee	29/Nov/92	29/Nov/92				△												△
Senior Advisors	31/Oct/92	31/Oct/92			△													△
Planning Seminar	30/Nov/92	26/May/93																
Mobilizing constitutencies	15/Sep/92	31/Aug/93																
National organizations	15/Sep/92	30/Aug/93																
Puveyors of programs	15/Sep/92	26/Aug/93																
Foundations	15/Sep/92	26/Aug/93																
Individuals	15/Sep/92	31/Aug/93																
Educators and Rabbis	15/Sep/92	26/Aug/93																
Staff seminars	18/Oct/92	18/Oct/92		△														△
Ongoing guidance to projects	15/Sep/92	09/Aug/93																
Networking	15/Sep/92	02/Sep/93																
Plan years two and three	12/Jul/93	30/Aug/93																△
Community Mobilization and Communicati	15/Sep/92	01/Sep/93	△															
Plan	08/Jan/93	26/Aug/93																
From 3 to 23	07/Jan/93	01/Sep/93																
Communications program	07/Jan/93	31/Aug/93																
Building the Profession	15/Sep/92	15/Sep/92	△															
Plan	10/Mar/93	08/Sep/93																
Develop a Research capability	15/Sep/92	15/Sep/92	△															
Decide on next steps	16/Aug/93	16/Aug/93																△
																		△

August 12, 1992

LEAD COMMUNITIES AT WORK

1. INTRODUCTION

The Commission on Jewish Education in North America completed its work with five recommendations. The establishment of Lead Communities is one of those recommendations, but it is also the means or the place where the other recommendations will be played out and implemented. Indeed, a lead community will demonstrate locally, how to:

1. Build the profession of Jewish education and thereby address the shortage of qualified personnel;
2. Mobilize community support to the cause of Jewish education;
3. Develop a research capability which will provide the knowledge needed to inform decisions and guide development. In Lead Communities this will be undertaken through the monitoring, evaluation and feedback project;
4. Establish an implementation mechanism at the local level, parallel to the Council for Initiatives in Jewish Education, to be a catalyst for the implementation of these recommendations;
5. The fifth recommendation is, of course, the lead community itself, to function as a local laboratory for Jewish education.

(The implementation of recommendations at the continental level is discussed in separate documents.)

2. THE SCOPE OF THE PROJECT

1. A Lead Community will be an entire community engaged in a major development and improvement program of its Jewish education. Three model communities will be chosen to demonstrate what can happen where there is an infusion of outstanding personnel into the educational system, where the importance of Jewish education is recognized by the community and its leadership and where the necessary resources are secured to meet additional needs.

The vision and programs developed in Lead Communities will demonstrate to the Jewish Community of North America what Jewish education at its best can achieve.

2. The Lead Community project will involve all or most Jewish education actors in that community. It is expected that lay leaders, educators, rabbis and heads of educational institutions of all ideological streams and points of view will participate in the planning group of the project, to shape it, guide it and take part in decisions.

3. The Lead Community project will deal with the major educational areas -- those in which most people are involved at some point in their lifetime:

- Supplementary Schools
- Day Schools
- JCCs
- Israel programs
- Early Childhood programs

In addition to these areas, other fields of interest to the specific communities will also be included, e.g. a community might be particularly interested in:

- Adult learning
- Family education
- Summer camping
- Campus programs
- etc...

4. Most or all institutions of a given area will be involved in the program (e.g. most or all supplementary schools).

5. A large proportion of the community's Jewish population will be involved.

C. VISION

The Lead Community will be characterized by its ongoing interest in the goals of the project. Educational, rabbinic and lay leaders will project a vision of what the community hopes to achieve several years hence, where it wants to in terms of the Jewish knowledge and behavior of its members young and adult. This vision could include elements such as:

- adolescents have a command of spoken Hebrew;
- intermarriage decreases;
- many adults study classic Jewish texts
- educators are qualified and engaged in ongoing training;
- supplementary school attendance has increased dramatically;
- a locally produced Jewish history curriculum is changing the way the subject is addressed in formal education;
- the local Jewish press is educating through the high level of its coverage of key issues.

The vision, the goals, the content of Jewish education will be addressed at two levels:

1. At the communal level the leadership will develop and articulate a notion of where it wants to be, what it wants to achieve.
2. At the level of individual institutions or groups of institutions of similar views (e.g., all Reform schools), educators, rabbis, lay leaders and parents will articulate the educational goals.

It is anticipated that these activities will create much debate and ferment in the community, that they will focus the work of the Lead Communities on core issues facing the Jewish identity of North American Jewry, and that they will demand of communities to face complex dilemmas and choices (e.g., the nature and level of commitment that educational institutions will demand and aspire to). At the same time they will re-focus the educational debate on the content of education.

The Institutions of Higher Jewish Learning, the denominations, the national organizations will join in this effort, to develop alternative visions of Jewish education. First steps have already been taken (e.g., JTS preparing itself to take this role for Conservative schools in Lead Communities).

D. BUILDING THE PROFESSION OF JEWISH EDUCATION

Communities will want to address the shortage of qualified personnel for Jewish education in the following ways:

1. Hire 2-3 additional outstanding educators to bolster the strength of educational practice in the community and to energize thinking about the future.
2. Create several new positions, as required, in order to meet the challenges. For example: a director of teacher education or curriculum development, or a director of Israel programming.
3. Develop ongoing in-service education for most educators in the community, by programmatic area or by subject matter (e.g. the teaching of history in supplementary schools; adult education in community centers).
4. Invite training institutions and other national resources to join in the effort, and invite them to undertake specific assignments in lead communities. (E.g. Hebrew Union College might assume responsibility for in-service education of all Reform supplementary school staff. Yeshiva University would do so for day-schools)
5. Recruit highly motivated graduates of day schools who are students at the universities in the Lead Community to commit themselves to multi-year assignments as educators in supplementary schools and JCCs.

6. Develop a thoughtful plan to improve the terms of employment of educators in the community (including salary and benefits, career ladder, empowerment and involvement of front-line educators in the Lead Community development process.)

Simultaneously the CIJE has undertaken to deal with continental initiatives to improve the personnel situation. For example it works with foundations to expand and improve the training capability for Jewish educators in North America.

E. DEVELOPING COMMUNITY SUPPORT

This will be undertaken as follows:

1. Establishing a wall to wall coalition in each Lead Community, including the Federation, the congregations, day schools, JCCs, Hillel etc..
2. Developing a special relationship to rabbis and synagogues.
3. Identify a lay "Champion" who will recruit a leadership group that will drive the Lead community process.
4. Increase local funding for Jewish education.
5. Develop a vision for Jewish education in the community.
6. Involve the professionals in a partnership to develop this vision and a plan for its implementation.
7. Establish a local implementation mechanism with a professional head.
8. Encourage an ongoing public discussion of and advocacy for Jewish education.

F. THE ROLE OF THE CIJE IN ESTABLISHING LEAD COMMUNITIES:

The CIJE, through its staff, consultants and projects will facilitate implementation of programs and will ensure continental input into the Lead Communities. The CIJE will make the following available:

1. Best Practices

A project to create an inventory of good Jewish educational practice was launched. The project will offer Lead Communities examples of educational practice in key settings, methods, and topics, and will assist the communities in "importing," "translating," "re-inventing" best practices for their local settings.

The Best Practices initiative has several interrelated dimensions. In the first year (1991/92) the project deals with best practices in the following areas:

- Supplementary schools
- Early childhood programs
- Jewish community centers
- Day schools
- Israel Experience programs

It works in the following way:

a. First a group of experts in each specific area is recruited to work in an area (e.g., JCCs). These experts are brought together to define what characterizes best practices in their area, (e.g., a good supplementary school has effective methods for the teaching of Hebrew).

b. The experts then seek out existing examples of good programs in the field. They undertake site visits to programs and report about these in writing.

As lead communities begin to work, experts from the above team will be brought into the lead community to offer guidance about specific new ideas and programs, as well as to help import a best practice into that community.

2. Monitoring Evaluation Feedback

The CIJE has established an evaluation project. Its purpose is three-fold:

a. to carry out ongoing monitoring of progress in Lead Communities, in order to assist community leaders, planners and educators in their work. A researcher will be commissioned for each Lead Community and will collect and analyze data and offer it to practitioners for their consideration. The purpose of this process is to improve and correct implementation in each Lead Community.

b. to evaluate progress in Lead Communities -- assessing, as time goes on, the impact and effectiveness of each program, and its suitability for replication elsewhere. Evaluation will be conducted by a variety of methods. Data will be collected by the local researcher. Analysis will be the responsibility of the head of the evaluation team with two purposes in mind: 1) To evaluate the effectiveness of individual programs and of the Lead Communities themselves as models for change, and 2) To begin to create indicators (e.g., level of participation in Israel programs; achievement in Hebrew reading) and a database that could serve as the basis for an ongoing assessment of the state of Jewish education in North America. This work will contribute in the long term to the publication of a periodic "state of Jewish education" report as suggested by the Commission.

c. The feedback-loop: findings of monitoring and evaluation activities will be continuously channeled to local and CIJE planning activities in order to affect them and act as an ongoing corrective. In this manner there will be a rapid exchange of knowledge and mutual influence between practice and planning. Findings from the field will require ongoing adaptation of plans. These changed plans will in turn, affect implementation and so on.

During the first year the field researchers will be principally concerned with three questions:

(a) What are the visions for change in Jewish education held by members of the communities? How do the visions vary among different individuals or segments of the community? How vague or specific are these visions?

(b) What is the extent of community mobilization for Jewish education? Who is involved, and who is not? How broad is the coalition supporting the CIJE's efforts? How deep is participation within the various agencies? For example, beyond a small core of leaders, is there grass-roots involvement in the community? To what extent is the community mobilized financially as well as in human resources?

(c) What is the nature of the professional life of educators in this community? Under what conditions do teachers and principals work? For example, what are their salaries and benefits? Are school faculties cohesive, or fragmented? Do principals have offices? What are the physical conditions of classrooms? Is there administrative support for innovation among teachers?

The first question is essential for establishing that specific goals exist for improving Jewish education, and for disclosing what these goals are. The second and third questions concern the "enabling options" decided upon in *A Time to Act*, the areas of improvement which are essential to the success of Lead communities: mobilizing community support, and building a profession of Jewish education.

3. Professional services:

The CIJE will offer professional services to Lead Communities, including:

a. Educational consultants to help introduce best practices.

b. Field researchers for monitoring, evaluation and feedback.

6

- c. Planning assistance as required.
- d. Assistance in mobilizing the community.

4. Funding facilitation

The CIJE will establish and nurture contacts between foundations interested in specific programmatic areas and Lead Communities that are developing and experimenting with such programs (e.g., the CRB Foundations and youth trips to Israel; MAF and personnel training; Blaustein and research).

5. Links with purveyors or supporters of programs

The CIJE will develop partnerships between national organizations (e.g., JCCA, CLAL, JESNA, CAJE), training institutions and Lead communities. These purveyors will undertake specific assignments to meet specific needs within Lead Communities.

G. LEAD COMMUNITIES AT WORK

The Lead Community itself will work in a manner very similar to that of the CIJE. In fact, it is proposed that a local "CIJE" be established to be the mechanism that will plan and see to the implementation and monitoring of programs.

What will this local mechanism (the local planning group) do?

- a. It will convene all the actors;
- b. It will launch an ongoing planning process; and
- c. It will deal with content in the following manner.
 - 1. It will make sure that the content is articulated and is implemented.
 - 2. Together with the team of the Best Practices project and with the Chief Education Officer, it will integrate the various content and programmatic components into a whole. For example: it will integrate formal and informal programs.

It will see to it that in any given area (e.g., Israel experience) the vision piece, the goals, are articulated by the various actors and at the various levels:

- by individual institutions
- by the denominations
- by the community as a whole.

In addition, dealing with the content will involve having a "dream department" or "blueskying unit," aimed at dealing with innovations and change in the programs in the community (this is elaborated in a separate paper).

H. LAUNCHING THE LEAD COMMUNITY -- YEAR ONE

During its first year (1992/93) the project will include the following:

1. Negotiate an agreement with the CIJE including:
 - a. Detail of mutual obligations;
 - b. Process issues -- working relations within the community and between the community, the CIJE and other organizations
 - c. Funding issues;
 - d. Other.
2. Establish a local planning group, with a professional staff and with wall-to-wall representation.
3. Gearing-up activities, e.g., prepare a 1-year plan, undertake a self-study (see 6 below), prepare a 5-year plan.
4. Locate and hire several outstanding educators from outside the community to begin work the following year (1993/94).
5. Preliminary implementation of pilot projects that result from prior studies, interests, communal priorities.
6. Undertake an educational self-study, as part of the planning activities:

Most communities have recently completed social and demographic studies. Some have begun to deal with the issue of Jewish continuity and have taskforce reports on these. Teachers studies exist in some communities. All of these will be inputs into the self-study. However, the study itself will be designed to deal with the important issues of Jewish education in that community. It will include some of the following elements:

- a. Assessment of needs and of target groups (clients).
- b. Rates of participation.
- c. Preliminary assessment of the educators in the community (e.g., their educational backgrounds).

The self-study will be linked with the work of the monitoring, evaluation and feedback project.

Some of the definition of the study and some of the data collection will be undertaken with the help of that project's field researcher.

* * * * *

G-A. Hagoz Speech
MCM speech

MEETING WITH ART ROTMAN

NATANYA - 11/10/92

AGENDA

1. CIJE WORKPLAN
2. LEAD COMMUNITIES: LAUNCH PLAN
3. LEAD COMMUNITIES: STAFF TRAINING

Simulation
1 - prepare

RESEARCHERS TRAINING

4. LEAD COMMUNITIES: UPTRAINING THE COMMUNITIES (PROFESSIONAL AND LAY LEADERS, EDUCATORS, RABBIS)
5. LEAD COMMUNITIES: ~~PLANNERS~~ SEMINAR + Lay, pros & educators
6. THE LETTER OF AGREEMENT
7. THE PLANNING OUTLINE
8. BARRY HOLTZ
9. DATES, DURATIONS, TASKS
10. NEXT STEPS
11. GA SPEECHES
12. TRAINING PROGRAMS: MAROM/WYGODA
13. FUNDRAISING

Proposal on hand for CRB

CR on both

send Art-School name

Send out list of what needs doing in ches & what SRE can do ~~to~~ now versus not now.

write for Art

Best Practices to be neg. with BH

Best Practices [≡ (list)]
Communities - mainly under OA
direct in introducing
Best Practices for translation
Head
conduct shadchan etc with principals.

Vera: a list of 12
list: 12

August 4, 1992

The Best Practices Project
Progress Report and Plans for 1992-93
Barry W. Holtz

Introduction

In describing its "blueprint for the future," A Time to Act, the report of the Commission on Jewish Education in North America, called for the creation of "an inventory of best educational practices in North America" (p. 69).

The primary purpose of this inventory is to aid the future work of the CIJE, particularly as it helps to develop the group of Lead Communities which will be selected this summer. As the Lead Communities devise their educational plans and put these plans into action, the Best Practices inventory will offer a guide to Jewish educational success that can be adapted for use in particular Lead Communities.

In addition, the Best Practices Project hopes to make an important contribution to the knowledge base about North American Jewish education by documenting outstanding educational work that is currently taking place.

The Best Practices Project as of today

This past year has been spent in designing a methodology for conducting a project that has never really been done in Jewish education before in such a wide-scale fashion. How do we locate examples of best practice in Jewish education? As the year has proceeded both an approach to the work and a set of issues to explore has evolved. We began by identifying the specific programmatic "areas" in Jewish education on which to focus. These were primarily the venues in which Jewish education is conducted such as supplementary schools, JCCs, day schools etc. A best practices team is being developed for each of these areas. These teams are supervised by Dr. Shulamith Elster and me.

We have come to refer to each of the different areas as a "division," in the business sense of the word. (Thus the Best Practices Project has a supplementary school division, an early childhood division, etc.) Each division's work has two phases. Phase 1 is a meeting of experts to talk about best practice in the area and to help develop the criteria for assessing "success"; Phase 2 is the site visit and report writing done by members of the team.

This year four different divisions were launched. We began with the supplementary school primarily because we knew that a) there was a general feeling in the community, particularly in the lay community, that the supplementary school had not succeeded; b) because the majority of Jewish children get their education in the supplementary school

and because of that perception of failure, the Lead Communities would certainly want to address the "problem" of the supplementary school; c) as the director of the project, it was the area in which I had the most experience and best sense of whom I could turn to for assistance and counsel.

As I reported earlier this year, a group of experts was gathered together to discuss the issue of best practice in the supplementary school. Based on that meeting I then wrote a Best Practices in the Supplementary School guide (see Appendix). A team of report writers was assembled and assignments were given to the team to locate both good schools and good elements or programs within schools (such as parent education programs).

We currently have a team of seven people looking and writing reports (see Appendix). By the end of the summer we should have the reports on ten schools as written up by the group members. The first results indicate that, indeed, there are successful supplementary schools and we are finding representative places that are worth hearing about and seeing. In the spirit of Professor Lee Shulman's talk at this year's GA, we have discovered real examples that "prove the existence" of successful supplementary schools. These are sites that people in the Lead Communities can look at, visit and learn from.

In May Dr. Elster and I launched our second division, early childhood Jewish education. We met with a group of experts (see Appendix) in this field and following up that meeting I wrote a Guide to Best Practice in Jewish Early Childhood Education . Many of the members of the group have already agreed to join our team of report writers. The writing will take place in September and October.

A third division, education in the JCC world, is in the early stages of development. Dr. Elster and I met with a team of staff people at the JCCA. Mr. Lenny Rubin of the JCCA is putting together a group of JCCA staff and in-the-field practitioners to develop the Phase 1 "guidelines" for this area. We will work with them in writing up the document. After this is completed (in the fall) a team of report writers (from that group and others) will be assembled to do the actual write-ups.

Finally, a fourth area-- best practices in the Israel Experience-- has been launched thanks to the work of the CRB Foundation. The Foundation has funded a report on success in Israel Experience programming which was written by Dr. Steven M. Cohen and Ms. Susan Wall. The CLJE Best Practices Project will be able to use this excellent report as the basis of further explorations in this area, as needed by the Lead Communities.

Next Steps: The 1992-1993 Year

New Areas

As mentioned above, we should have reports of the Early Childhood division completed in the early fall. The JCC division should be operationalized in the fall. During the 1992-3 year we also plan to launch the following areas: day schools, adult education, etc. Each presents its own interesting challenges. Of these we have already begun to plan in a preliminary way for the day schools division. Here the goal is to gather together experts from the academic world of Jewish education (like our supplementary school group) as well as actual practitioners from the field. The current plan is to have each school that is written up be analyzed for one particular area of excellence and not for its over all "goodness." Thus we would have X school written up for its ability to teach modern Hebrew speaking; another for its text teaching; another for its parent education programs; another for its in-service education, etc.

Documentation

Another task that needs to be considered is finding more examples of best practices within those areas that we have already looked at, or to look at the examples we currently have in even greater depth. This applies particularly to supplementary schools because we will have only explored ten schools and programs and there is such a wide range of supplementary schools across America that we ought to have some more breadth in this area. A similar case could be made for early childhood programs.

At the time of our first exploration of supplementary schools, we sent a letter to all the members of the Senior Policy Advisers asking for their suggestions. In addition, we worked with Dr. Eliot Spack, Executive Director of CAJE, to send a similar letter to "friends within CAJE." Because of these initiatives we now have a list of 20 to 30 Hebrew schools that we might want to investigate.

Dr. Jonathan Woocher, Executive Director of JESNA, has asked the following question: "for the purposes of the project, how many examples of best practice do you really need in any one given area?" Do we need to have ten reports of supplementary schools or twenty or sixty? Another question might be raised about the "depth" of the current reports. Many of the report writers have said that they would like the chance to look at their best practice examples in more detail than the short reports have allowed. I have called this the difference between writing a "report" and writing a "portrait" or study of an institution.

The research component of the Best Practices Project would certainly welcome either greater breadth or greater depth, but at the present moment we believe that the first priority is to answer another question: What do the Lead Communities need? After

meeting with the representatives of the Lead Communities that are chosen, we will have a better sense of the next stages of the Lead Community Project-- what the planning and implementation needs will be. At that point we will be able to decide the best direction the documentation should move in.

Lead Communities: Implementation-- and How to do it

Aside from launching the other divisions mentioned above the other main initiative of the Best Practices Project for the coming year will be thinking through the issue of best practices and Lead Communities. Professor Seymour Fox has often spoken about the Best Practices Project as creating the "curriculum" for change in the Lead Communities. The challenge this year is to develop the method by which the Lead Community planners and educators can learn from the best practices that we have documented and begin to introduce adaptations of those ideas into their own communities. This can occur through a wide range of activities including: site visits by Lead Community planners to observe best practices in action; visits by best practices practitioners to the Lead Communities; workshops with educators in the Lead Communities, etc. The Best Practices Project will be involved in developing this process of implementation in consultation with the Lead Communities and with other members of the CIJE staff.

From Best Practice to New Practice

On other occasions we have spoken about the need to go beyond best practices in order to develop new ideas in Jewish education. At times we have referred to this as the "department of dreams." We believe that two different but related matters are involved here: first, all the new ideas in Jewish education that the energy of the CIJE and the Lead Community Project might be able to generate and second, the interesting ideas in Jewish education that people have talked about, perhaps even written about, but never have had the chance to try out. It is likely that developing these new ideas will come under the rubric of the Best Practices Project and it is our belief that the excitement inherent in the Lead Community Project will give us the opportunity to move forward with imagining innovative new plans and projects for Jewish educational change.

APPENDIX

Team Members: Best Practice in the Supplementary School

Report Writers:

Ms. Kathy Green (Reconstructionist Rabbinical College, Philadelphia)
Ms. Carol Ingall (Melton Research Center and BJE, Providence, RI)
Dr. Samuel Joseph (HUC-Cincinnati)
Ms. Vicky Kelman (Melton Research Center and Berkeley, CA)
Dr. Joseph Reimer (Brandeis University)
Dr. Stuart Schoenfeld (York University, Toronto)
Dr. Michael Zeldin (HUC-LA)

Additional Consultants:

Dr. Isa Aron (HUC-Los Angeles)
Ms. Gail Dorph (University Of Judaism, Los Angeles)
Dr. Samuel Heilman (Queens College, NY)

Team Members: Early Childhood Jewish Education

Report Writers

Ms. Miriam Feinberg (Washington, DC);
Dr. Ruth Pinkenson Feldman (Philadelphia);
Ms. Jane Perman (JCC Association);
Ms. Esther Friedman (Houston);
Ms. Esther Elfenbaum (Los Angeles);
Ms. Ina Regosin (Milwaukee);
Ms. Charlotte Muchnick (Haverford, PA);
Ms. Rena Rotenberg (Baltimore);
Ms. Shulamit Gittelson (North Miami Beach);
Ms. Lucy Cohen (Montreal);
Ms. Roanna Shorofsky (New York);
Ms. Marvell Ginsburg (Chicago).

To: Seymour

From: Barry Holtz

I'd like to get a sense of your schedule for your upcoming visit and wonder if you could call or FAX to let me know when you have free. Here is what is on my mind:

- 1) Shulamith and I have talked about the two of us meeting with you on Wednesday, November 18th from 3 to 5 PM.
- 2) Do you think you could find time to meet with Edy and me to talk about Melton issues-- in particular thoughts you might have about us approaching Sam and Florence for funding; future directions for the Center, etc.
- 3) My friend Alan Mintz, now a Professor of Hebrew lit at Brandeis has a very interesting proposal about setting up some work at Brandeis in dealing with the Hebrew issue for Jewish education. He would like to talk to you about this with the thought that this might tie in to CIJE work, Mandel institute interests, Mort's interests, etc. I would personally appreciate it if you could meet or talk with him.

If you have time free for any of the above, I'd like to know when that might be. Thanks.

MELTON RESEARCH CENTER
for Jewish Education

Jewish Theological Seminary
3080 Broadway
New York, NY 10027
(212) 678-8031
Fax (212) 749-9085*

To: Seymour and Annette

At FAX Number: Manhat Institute

From: BARRY HOLTZ

Date: May 15

Total pages including this one: 3

RE:

Sorry to lay so many Faxes on you in one day!
Please note the letter I received from Barry
Chazan and my reply (on the next two sheets)
for future discussion.

Barry J CCA

*If you experience difficulty transmitting to this FAX number,
please use the JTS main FAX number as an alternate: (212) 678-8947.
Kindly indicate that this message should be forwarded to the Melton
Research Center. Thank you.

**Israel Office**

12 Hess St., Jerusalem 94185

Tel. 02-231071/231265 Fax 02-249967

International SAN: 072-2-247707

212 749 9085 12 May 1992

TO: Barry Holtz
Melton Research Center

FROM: Barry Chazan

RE: Best Practices and Life

It was great seeing you twice at JCC Association during my recent trip. Indeed, I am pleased that you have increasingly become a "ben bayit" in the center world and that the center world has been able to profit from your work. Also, I am pleased that it has enabled us to spend more time together.

I thought that the Wednesday meeting with you and Shulemit was excellent. It brought out the best in the JCC people and enabled them to reflect on issues and on a level in away that isn't always possible.

Indeed, they got quite taken with the idea of JCC being able to develop some more serious kind of "study" (the album idea) of venues and "cultures" of outstanding Jewish educational worlds in JCC's and the idea was discussed in greater detail on Thursday by the two key execs of the agency. The idea of CIJE financing that was briefly floated at our Weds. meeting interested them and there is a good chance that we could put together a nice study project (which I would do since I am taking a leave from teaching next year) if they can get some funds for it. To the extent that you can comment on this (this is an informal "schmooze" between us): do you think that there is a real possibility of CIJE funds for this, and if so, in what range? I believe that we might be able to put together something valuable here if we can recruit some support funds for it.



**MELTON
RESEARCH
CENTER**
for Jewish Education

Jewish Theological Seminary
3080 Broadway
New York, NY 10027
(212) 678-8031
Fax (212) 749-9085*

To: Dr. Barry Chazan

At FAX Number: JCCA

From: BARRY HOLTZ

Date: May 15 1992

Total pages including this one: 1

RE:

Thanks for your Fax. Yes, we would like to pursue this, but the issue is what kind of budget exists for this. As yet that has to be examined. As the JCCA works out a plan with us for examining Best Practice, we should keep this on the agenda. Thanks!

B.

*If you experience difficulty transmitting to this FAX number, please use the JTS main FAX number as an alternate: (212) 678-8947. Kindly indicate that this message should be forwarded to the Melton Research Center. Thank you.

**MELTON
RESEARCH
CENTER**
for Jewish Education

Jewish Theological Seminary
3080 Broadway
New York, NY 10027
(212) 678-8031
Fax (212) 749-9085*

To: Seymour Fox + Annette Hochstein

At FAX Number: Mandel Institute

From: Barry Holtz

Date: May 15

Total pages including this one: 7

RE:

*If you experience difficulty transmitting to this FAX number, please use the JTS main FAX number as an alternate: (212) 678-8947. Kindly indicate that this message should be forwarded to the Melton Research Center. Thank you.

 **MELTON
RESEARCH
CENTER**
for Jewish Education

May 15, 1992

To: Mort Mandel, Isa Aron, Adam Gamoran, Mark Gurvis, Steve Hoffman, Jack Ukeles & Jim Meier, Jon Woocher, Seymour Fox & Annette Hochstein

From: Barry Holtz

Friends,

The enclosed article just came out in the new Melton Journal. Since it deals with issues that have come up in our CIJE work, and indeed discusses some of our projects, Shulamith suggested that I send out a "reprint" version to each of you.

Many thanks to Seymour and Annette who first suggested that I read the Smith and O'day article discussed in the article.

Barry

THE MELTON JOURNAL

ISSUES AND THEMES IN JEWISH EDUCATION

5, Spring 1992

Melton Research Center for Jewish Education/The Jewish Theological Seminary of America

Iyar 5752

Making Change Happen: Prospects for Innovation in Jewish Education

By Barry W. Holtz

It would not be an exaggeration to say that the issue of change and innovation has been the dominant concern in American educational writing for the past two decades. In fact, as one recent article put it, "William Torrey Harris, whose influence waned in the early 1900s, was the last major figure in American education not identified with change!"

Of course the term "change" means different things to different writers. For some it means finding ways to change the current pedagogic practices used in schools.

For these writers change can happen through new curricular materials or teacher education programs (either in the "pre-service" phase of teacher training or through innovative "inservice" programs). For others it means focusing on issues of personal growth either for students or teachers. For others still, it suggests developing systems through which educational structures such as schools can avoid being locked into rigidity. Change in this last case is a matter of administrative and systemic flexibility.

Although the literature employs all three of these meanings for change, by far the most prevalent usage is the first: change means introducing new ways of teaching and learning into educational settings. The search for the "new and improved" is a particularly American concern, of course, but in a certain sense, this enormous emphasis on change points to a deeper malady: any educational system which so obsessively looks toward change must have considerable doubts about its own success or effectiveness! Jewish education, too, shares these doubts, thus the literature on change and innovation has significant implications for our work as well. What does contemporary writing about change tell us? And in what way is this research relevant to the situation of Jewish education today?

The process of change, as understood in the manner that we are using it here, essentially consists of three related phases. First, the educational setting must sense dissatisfaction with the way that something is currently operating. Second, an alternative educational mode must be proposed, whether it be a method of teaching, a conception of subject matter, a vision of educational organization, or anything else. The alternative mode may be a new creation or it may be adaptation of an idea or approach currently in practice (this is sometimes called the "best practice" approach) elsewhere. Finally, the innovation must be introduced into the field, tested and evaluated. Thus, to choose a well-known example, the dissatisfaction with the teaching of science in American public schools in the late 1950s, spurred on by the Russian Sputnik launch, led to the creation and implementation of the "new science" curricula of the period.¹

Of the three stages of change it is the last—the implementation phase—that has engendered the most research. The reason may be obvious: there is no dearth of information about phase one, dissatisfaction with education (both in general and Jewish contexts). And in the general education field there is certainly a good deal of literature proposing innovation and delineating best practice. The deep question is something else: why—with our discontent and with all of the many proposals that people have made for in-

Barry W. Holtz is co-director of the Melton Research Center and an editor of this Journal.

vation—why has so little changed? As Marshall S. Smith and Jennifer O'Day, authors of an important recent essay on the topic, have put it:

The past decade has seen a blizzard of reports, Federal and state legislation, and local efforts designed to stem the "rising tide of mediocrity" in US education. . . .

Yet for all this effort, evaluations of the reforms indicate only minor changes in the typical school, either in the nature of classroom practices or in achievement outcomes. . . . For the most part, the processes and content of instruction in the public school classrooms of today are little different from what they were in 1980 or in 1970. . . .²

Smith and O'Day are by no means the first to raise this kind of complaint. Their essays echo one of the classic works in the field, Seymour Sarason's *The Culture of the School and the Problem of Change* (Allyn and Bacon, 1971). It was Sarason who neatly summed up his thesis by asking: why is it true that in education the more things change, the more they remain the same? As a social psychologist, Sarason saw the answer in the nature of human interactions in fixed structures such as schools.

Sarason pointed out that work in schools proceeds by a set of established frameworks and ways of acting which he termed "regularities." Some regularities are "programmable," that is they relate to the specific programs of the school (sometimes the state or district mandates these)—such as the number of hours that certain subjects meet, the dismissal time, the report cards, etc. Other regularities are "behavioral"—they concern those specific activities which tend to be on the "small scale" such as the number of questions that teachers ask students when running a class. In both cases, Sarason pointed out, the established patterns of action are very difficult to change. When Sarason as a researcher began raising issues about the nature of both programs and behavior, he faced enormous resistance.

Sarason would challenge his listeners by playing the role of a visitor from Mars who asked the most basic questions about why we do the things we do in schools. He pushed people to think about "what is the universe of alternatives that could be considered" and "what is the intended outcome of the programmatic regularity." He was especially concerned about situations in which there were programs in place for many years, when the way things were done seemed to be the *only* way that one could do them. What Sarason discovered from these exercises of analysis and questioning was that the normal modes of behavior were so powerful that people often could see no other way of acting.

We know the phenomenon of regularities well from Jewish education. For example, many aspects of the program at Camp Ramah (how Shabbat meals are done; prayer; organizational structure; classes, etc.) have often seemed inviolate. *These are the way things have to be done.* If you ask why, you can often get a host of interesting answers, but more often than not, lurking behind them is the real point: *because it's the way things have always been done.*

Or consider another example: Some years ago the Melton Center tried to argue in its curriculum for Holi

days/Mitzvot/Prayer that Hebrew schools should eliminate the school-wide model seder. The curriculum writers made a strong, and I believe convincing, case for the change. The problem was no one would accept it. The model seder was *torah min ha-shamayim*—to change it, to eliminate it, was impossible, no matter how incisive and compelling our argument was.

Sarason's book was a powerful report on the problems of innovation, but one reads it almost with a sense of hopelessness. Can nothing make a difference? Perhaps Sarason's psychological orientation exacerbates the despair by giving his presentation an air of inevitability: this is how human beings behave; there is little we can do about it. More recent writers, however, have tried to explore the question of change from different perspectives to see if there may be some way in which change can effectively be implemented.

Probably the most famous of all the recent explorations of change in schools was the project launched by the Rand Corporation in the late 1970s, usually called the "change agent" study.⁴ Recently, one of the principal researchers in the

change agent study, Milbrey W. McLaughlin, revisited the Rand study to reflect on what the passage of 15 years had meant to her view of the original work.⁵ The article provides both a useful summary of the earlier findings and thoughts by the author on which of those findings have held up and which have not.

One of the important findings of the original study had to do with the relationship between "outside" agents for change and the internal staff of a school. The original study pointed out the many inadequacies of the typical "top down" approach to implementing change. Rand argued that projects planned in a *collaborative* way with teachers and staff work better than either top-down or bottom-up approaches to inservice work.

Although McLaughlin's new thinking does not reject the original finding about collaboration as the optimal model for inservice work, she now amends that position and argues that sometimes "belief follows practice". That is, it is possible for the outside agent to come in and "convert" the on-site people to the need for change, even if the insiders didn't invent

or call for the new program or change to be implemented.

The "new" Rand, likewise, is much less skeptical about the role of "external agents and their ability to promote positive change in local practice."⁶ The real key, McLaughlin points out, is that the outside consultants must not impose a standardized practice from above, but rather must recognize the importance of "mutual adaptation."

The other main emphasis in the new Rand echoes other recent writing about the change process—the need to view change as part of a *large scale* effort rather than attempting to introduce small bits of innovation in a piecemeal way. As McLaughlin states toward the end of the article, "special projects focused on single issues ignore the systemic and interconnected conditions that influence classroom practice." And "reform needs to be systemic and on-going."⁷

The issue of systemic change is also discussed perceptively by Larry Cuban in an article that explores the reasons for the failure of school reform. Cuban suggests that we can define two types of change—"first-order changes" are those which change particular practices in schools, "without disturbing the basic organizational features, without substantially altering the way that children and adults perform their roles."⁸ Such changes might include "raising salaries . . . selecting better textbooks . . . and introducing new versions of evaluation and training."⁹

Second-order changes are more radical. They effect the deepest structures of schools themselves. They "introduce new goals, structures and roles that transform familiar ways of doing things into new ways of solving persistent problems."¹⁰ These might include open classrooms, voucher programs or teacher-run schools. It is this type of radical change which schools have resisted most powerfully. The problem, Cuban argues, is that reformers tend to underestimate the problems of introducing second-order change, and in doing so they make promises that cannot be fulfilled. "For those who seek

fundamental, second-order changes that will sweep away current structures and start anew . . . *basic social and political changes would need to occur outside of schools*" (emphasis his).¹¹ What Cuban calls for is "clearer and more modest" as of what is possible within current structures of schooling.¹²

Nothing more characterizes the recent literature on change than the focus, such as Cuban's, on the ways to effect the structures of institutions. One of the best examples of a "systems" approach to change is the article by Smith and O'Day mentioned previously. These two writers argue that current research has shown certain basic characteristics of good schools—"a school wide vision and school climate conducive to learning, enthusiastic and knowledgeable teachers, a high quality curriculum and instructional strategies, a high level of engagement, shared decision-making, and parental support and involvement."¹³ The problem, then is not that we don't know what works: what we need to discover is "why aren't more of our schools like this? . . . why are these schools so exceptional and vulnerable?"¹⁴

For Smith and O'Day the answer is that most reforms which have been introduced have not touched the basic structures of schools; they have been scattershot and unintegrated. Smith and O'Day want to see approaches that hit the basic organizational modalities of schools: "If the new reform movement is to have a lasting effect on what happens in the classroom, it will thus have to overcome the current fragmentation of the system and provide a coherent direction for change and the resources to accomplish those changes."¹⁵ In their article they try to outline what this would mean. By and large the recommendations of the Smith and O'Day article aim at utilizing the power of states (rather than local authorities) to "design and orchestrate the implementation of a coherent instructional guidance system." Here is how they sum up their ideas:

The cornerstone of the system would be a set of challenging and progressive curriculum frameworks. The frame-

works would be developed through a collaborative process involving master teachers, subject matter specialists, and other key members of the state community and would be updated on a regular basis. . . . The state would be responsible for establishing a set of challenging student achievement goals, based on the frameworks. Teachers and other local school professionals would be responsible for designing and implementing the curriculum and pedagogical strategies for their schools. . . . to best meet the needs of their particular students.¹⁶

In addition, Smith and O'Day argue, these "curriculum frameworks" would form the basis of both preservice and inservice education programs by giving the planners of those programs a clear sense of the goals that would need to be achieved in helping teachers grow and develop.

Smith and O'Day are not, I believe, calling for "second-order" changes in the way that Cuban has described this phenomenon. They are hoping to improve what currently exists rather than seeking to reconceptualize the whole notion of schools and schooling. In that sense one might believe that what they propose has the possibility for success. As Cuban has suggested, most reforms since the turn of the century have succeeded to the extent that they supported and improved "the quality of what already existed—what had come to be called traditional schooling—and not to alter the existing organizational structures."¹⁷

But to my mind Smith and O'Day are overly optimistic in believing that the state could take such an active and positive role in determining curriculum, learning objectives and teacher education programs. They very much want to retain the local autonomy of teachers by saying that the state should merely set the frameworks, and that the local school will plan the curriculum. Yet in real life it is unlikely that this subtle distinction will be maintained. We are more likely to get, I believe, at best a rather flat and uninteresting set of "objectives" with no bite or content or at worst the serious meddling into educational planning that will completely disenfranchise the teacher. I hope Smith and O'Day are right, but I don't hold much hope their plan will be implemented with the seriousness that they recommend. Without that, it seems unlikely to me that it will work.

Looking at their article, however, gives us a sense of the ways that Jewish education both resembles and differs from education in the public sector and suggests ways that the issue of change may be approached within the field of Jewish education.

To begin with, of course, like the field of general education in America, there is a good deal of dissatisfaction with contemporary Jewish education and the desire to implement change is in the air. American education has seen a plethora of reports and recommendations during the last decade and a half in which a number of ideas for change have been articulated.¹⁸ The nearest thing to such a report that we have in the Jewish community is the recent publication of the Commission on Jewish Education in North America, a distinguished panel of community leaders, institutional professionals and academicians. The Commission's report, *A Time to Act*, outlines the crisis in contemporary Jewish education and sounds a call for change and innovation. Thus like American education, Jewish education has entered the first phase of change—determining that something is wrong.

When we turn toward the second phase of change—ideas for innovation and practice—the situation differs from what we have seen in American education. To take the Commission on Jewish Education as an example, we note that unlike reports such as the Carnegie Commission or *A*

Nation at Risk, *A Time to Act*, does not outline a specific agenda for change beyond two important recommendations, namely the need for "building community support" for Jewish education and for "building the profession" of educators through recruitment, training, and techniques of retention. The Commission refused to choose specific "programmatic options" for change (e.g. focusing on day schools or early childhood education or media for Jewish education), although it listed twenty-three such options that had been raised in its meetings.

Instead the Commission called for establishing a group of model Lead Communities. "local laboratories for Jewish education" in which the best ideas available about educational practice would be tried out. It seems that two factors influenced the decision not to choose specific programmatic approaches. First, the Commission wished to hold on to the unusually broad-based coalition that it had managed to assemble. Had it opted for some programs over others, it might have endangered that delicate balance. But beyond that specifically structural agenda, something more important was at work here.

the Commission...
...now which one to choose. In other words,
...the state of Jewish educational research
...and the particular nature of Jewish educa-
...on and its issues (as opposed to general
...education) is such that we simply do not
...know whether an investment in, say, early
...childhood education is better than invest-
...ing in college age students or curriculum
...reform. We have opinions or hunches, but
...here is no inherent logic by which the
...efficacy of one option over another could
...be proved.

A century of research in general educa-
...tion has led to conclusions about what
...works and what doesn't. But the goals of
...Jewish education are different from gener-
...al education, especially when the stakes
...raised by the Commission's report are so
...high: nothing less than the continuity of
...the Jewish people. In those areas in which
...Jewish education closely resembles gener-
...al education (such as day school educa-
...tion), we might be able to extrapolate
...from one to the other and say that in so
...far as any school is still a school, we can
...guess what would probably work in a Jew-
...ish day school.

But nothing in general education can
...determine what will help children identify
...with Israel or learn to experience prayer
...or celebrate the Jewish life cycle. At this
...time we do not know what aspects of Jew-
...ish education, if any, will really enhance
...the possibilities for longterm Jewish conti-
...nuity. Thus the call for the establishment
...of living laboratories through the Lead
...Communities takes the term quite literal-
...ly: perhaps by such experiments, by blend-
...ing options in interesting ways, we can
...begin to figure out what really will make
...for success.

When the research in general educa-
...tion can be helpful is in the issues of the
...third phase of change—implementing
...innovations. First, the findings of the
...Rand studies seems to urge us toward at
...least a certain level of boldness. McLaugh-
...lin points out that "ambitious efforts were
...more likely to stimulate teacher change
...and involvement than were modest, nar-
...row projects."¹⁹ At the same time she
...warns that these changes need to be intro-
...duced in a way that they would not over-
...whelm the implementing system. To me
...this suggests that it is important to think
...globally, to plan serious and significant
...changes for Jewish education, but to be
...careful to build support and structure for
...these changes in a meticulous and carefully
...constructed fashion.

The new Rand findings stating that out-
...side consultants can be of assistance in
...implementing change is also a hopeful sign
...for innovation work in Jewish education.

Nonetheless, the warning that these out-
...side consultants must work in an "adap-
...tive" way with the local constituents is
...something that we must take quite seri-
...ously. In Jewish education, even more
...than in general education, we tend to
...believe (and perhaps accurately) that
...there is a great paucity of expertise at the
...local level. Many teachers, for example, in
...the supplementary schools are not pro-
...fessionally trained or see themselves as
..."avocational"; a similar situation obtains
...in much informal Jewish education.
...Nonetheless, the need to adapt to the spe-
...cific setting to work collaboratively with
...the local personnel is crucial to success. As
...McLaughlin puts it, "Rand's conclusion
...that local choices about how (or whether)
...to put a policy into practice have more sig-
...nificance for policy outcomes than do such
...policy features as technology, program
...design, funding levels or governance
...requirements. Change continues to be a
...problem of the smallest unit" (emphasis
...mine).²⁰

Finally, we must heed the warning that
...a focus on single issues is unlikely to pro-
...duce significant results. Change needs to
...be broad, systemic and on-going.

But what are the means of moving the
...system toward change? Jewish education
...exists both on a different scale from gen-
...eral education and within a different orga-
...nizational system. Thus it is unclear if the
...suggestions in the article by Smith and
...O'Day can be of assistance in thinking
...about Jewish education. Smith and O'Day
...assume an educational framework which
...is under the supervision of public officials
...and under the control of state authorities.
...Their idea is to use that legal structure as
...a way of goading the system into action.
...Whether such an approach can be success-
...ful is irrelevant to our concerns here; what
...matters is that essentially Jewish educa-
...tion is a voluntary system that has few of
...the enforcement controls that general
...education does. By comparison to public
...education with its legal controls, the
...Jewish Federation framework is a weak
...enforcement agency and while certain
...financial power is in the hands of Federa-
...tion, much of Jewish education (for exam-
...ple, congregational schools) answers
...primarily to itself and not to any outside
...agency.

Of course, this is not necessarily so.
...Unlike the complex legal and bureaucrat
...structures of public education, Jewish ed
...cation is (at least in theory) significant
...leaner and easier to move. Jewish educa
...tion may be ready, in other words, for th
...second-order changes that Larry Cub
...has discussed.

It seems to me that the particular natu
...of the concerns of Jewish education m
...help lead toward reform. I see this in tw
...almost contradictory ways: First, becau
...of the sense of crisis engendered by th
...recent CJE National Jewish Populatio
...Survey,²¹ particularly around the issue
...intermarriage, there is a considerab
...interest in viewing Jewish education as
...means of ensuring Jewish continuity fr
...the next generation. An impetus towa
...change may emanate out of both the an
...xiety created by the CJE study and the pe
...ception that until now Jewish educatio
...has failed. In other words, the leadersh
...of the community may feel that if th
...future of the Jewish people is to be pr
...served, we must now introduce serio
...change into Jewish education.

Ironically, change may also be possib
...because of another tendency as we
...Namely, the very marginality of Jewi
...education in the lives of most Jews. Th
...factor might work in the following way:
...public education every proposed chan
...calls forth an enormous hue and cry. Maj
...political battles are fought; special intere
...protect their turf; unions and minoritie
...parents and teachers view any possib
...change with a great deal of seriousness a
...often suspicion. Moreover, in a certa
...sense the entire system in set up in a w
...that will not allow change to happen.²²

But perhaps in Jewish education chan
...can happen more easily because the stak
...are perceived as being so low! That
...except for the leaders of the communi
...who are disturbed by the CJE study a
...who hope that education may be able
...stem the tide of intermarriage, mo
...American Jews find Jewish education
...be rather low on their list of priorities
...certainly not as high as the public or p
...vate education that their children are ge
...ting. It is this latter form of educatio
...after all, that will get their kids into co
...leges and careers. Jewish education, f
...most of American Jewry, may be a kind
...barely tolerated frill.

Because of that very fact, howeve
...because the concern is low, changes in th
...system of Jewish education, even maj
...second-order changes, have the kind
...chance to be introduced in a way th
...would never be able to happen in pub
...education.²³ No matter what the moti
...tion much will depend on whether we, t
...Jewish educational community, have t
...will, the imagination and the boldness
...aim for serious change.

- 1 Daniel J. Walsh, et al., "Changing One's Mind—Maintaining One's Identity: A First-Grade Teacher's Story," *Teachers College Record* 93:1 (Fall, 1991), p. 73.
- 2 Historians of education have shown that contrary to the popular image of the period, Sputnik did not cause the renewed curricular emphasis on science education, but it did serve as a powerful goad that enabled educators to mobilize public support for innovations that were already in the planning stages. See Diane Ravitch's *The Troubled Crusade* (Basic Books, 1983), pp. 228-232, and Lawrence A. Cremin's *The Transformation of the School* (Knopf, 1961) p. 347.
- 3 Marshall S. Smith and Jennifer O'Day, "Systemic School Reform," in *Politics of Education Association Yearbook 1990*, p. 233.
- 4 A well-known summary of the results, "Staff Development and School Change" by Milbrey W. McLaughlin and David Marsh, appeared in *Staff Development*, edited by Ann Lieberman and Lynne Miller (Teachers College Press, 1979).
- 5 *Educational Researcher* Volume 19:9 (December 1990), pp. 11-16.
- 6 McLaughlin, p.13.
- 7 *Ibid.*, 15.
- 8 Larry Cuban, "A Fundamental Puzzle of School Reform" in *Phi Delta Kappan* 69:5 (January, 1988), p. 342. The terms come from a book by Paul Watzlawick, John Weakland and Richard Fisch, *Change: Principles of Problem Formation and Problem Resolution* (Norton, 1974).
- 9 *Ibid.*
- 10 *Ibid.*
- 11 *Ibid.*, p. 344.
- 12 *Ibid.*
- 13 Smith and O'Day, p. 236.
- 14 *Ibid.*
- 15 *Ibid.*, p. 245.
- 16 *Ibid.*, p. 261.
- 17 Cuban, p. 343.
- 18 They include: *A Nation at Risk* (National Commission on Excellence in Education; 1983), *High School* (by Ernest Boyer, for the Carnegie Foundation for the Advancement of Teaching; 1983), *A Place Called School* (by John Goodlad; 1983), *Tomorrow's Schools* (the Holmes Group; 1990), etc.
- 19 McLaughlin, p. 12.
- 20 *Ibid.*
- 21 Barry Kosmin, et al., (Council of Jewish Federations, 1990).
- 22 Cuban discusses this in another article, "Reforming again, again, and again" published in *Educational Researcher* 19:1 (1990).
- 23 Oddly enough, for that very reason, it is the area of day school education that we may see the least openness to change. Since day schools are not only responsible for the Jewish education of children, but for their general education as well, parents may be much more wary of introducing second-order change into the day school. There the stakes are perceived as being "Higher"!

A NEW RITE OF PASSAGE

bringing the Israel Experience
to Jewish high school youth
of North America
a pilot project

United Jewish Appeal
Council of Jewish Federations
Jewish Community Centers Association
Jewish Education Service of North America
in cooperation with
The CRB Foundation

announce a continent-wide initiative to mobilize the leadership of the North American Jewish Community to the imperative of providing all North American Jewish High School Youth with the opportunity to participate in an Israel Experience Program. Believing that the Israel Experience holds great promise for heightening awareness, strengthening identity, and, making a significant contribution to contemporary Jewish life and education and Jewish continuity, the CJF, CRBF, JCCA, JESNA and UJA have joined together to increase the current level of participation in these programs throughout the United States and Canada.

In order to effectively coordinate these efforts with the North American Jewish Youth Organizations, a senior Advisory Committee will consist of representatives of the American Zionist Youth Foundation (AZYF) and the North American Jewish Youth Directors Association (NAJYD). Consortium staff will consult regularly with the Advisory Committee.

The campaign will focus on 8-10 communities selected for their potential to produce effective change: heightened recognition of the importance of the Israel Experience amongst lay and professional leaders; increased numbers of participants in Israel Experience programs; increased pre and post-trip programs for teenagers and their families; increased availability of scholarships, saving plans, and other financial mechanisms to support a greater number of participants; and other elements that the communities consider appropriate for their particular needs. Programs will be developed with the goal of producing replicable models for use throughout the continent. The Consortium will facilitate the sharing of these approaches and programs with communities beyond the pilot project.

with side *

Projected Pilot Community Program:

Upon selection, Communities will receive a challenge grant each year of the pilot project. In addition, CRBF staff ¹ will consult with the pilot communities to determine which of the following services may be provided:

- a) marketing advice, program development, and other related guidance. Marketing consultation will be provided by JCCA Marketing Services.
- b) feasibility assessment of establishment of local community-based Israel experience programs within the framework of existing national organizations and/or as new independent programs.
- c) Guidance in the development of financial packages to provide necessary scholarship assistance, matching savings plans, and other creative techniques to effectively reduce the financial barrier to greater participation.
- d) Assistance in the identification and mobilization of local lay leadership for Israel Experience initiatives.
- e) Dissemination of research from CRBF sponsored studies covering such topics as: components of the Excellent Israel Trip, Economics of trips, etc. will be made available to community planners.
- f) Coordination with current marketing outreach initiatives being conducted by recipients of CRBF/JAJZE support with efforts in pilot communities (wherever possible).
- g) Assistance in the development of comprehensive pre-and post-trip programs.

The Consortium is focused on high school age, but also encourages those communities who may wish to direct some of their efforts at college-age.

The program envisages a three year commitment in the pilot communities. Communities are expected to phase-in their own commitment to the program during the three year pilot project so that it will emerge self-sufficient at the end of the pilot period.

¹ In coordination with and with participation of designated staffs of consortium agencies.

Selection Criteria

The Management group will receive recommendations (from staff committee) of pilot communities. (We seek to complete this process before the GA.) Selection will be based upon the following criteria:

1. Communities which have undertaken to develop (or agree to develop) broad-based local coalitions aimed at strengthening Jewish continuity.
2. Communities which will (or commit to) establish an Israel Experience Committee with the participation of the highest level of lay and professional leadership representing all appropriate local agencies (e.g., Bureaus, Federation, JCC's, Synagogues, Zionist Youth Movements, etc.).
3. Communities which have evinced interest in expanding their work in the Israel Experience area (e.g., through the development of proposals to The CRB Foundation/Joint Authority for Jewish Zionist Education (JAJZE) Marketing Initiative).
4. Communities which will commit to providing a staff member(s) to coordinate these efforts in the local community.
5. Communities which will commit to the development of comprehensive programs for teenage participants in Israel Experience programs including pre-trip preparation of child and family and post-trip follow-up.
6. Communities will be expected to identify college students to serve in positions as staff members for local as well as continental programs. This will include support for student participation in continental staff training programs provided by CRBF.
7. Communities will be required to participate in an evaluation of their project.

In addition to the above, communities will have to commit to a *minimum* annual financial commitment of matching (by a three to one ratio) the funds provided by UJA (50% of that total to be used for partial scholarships and 50% for other local initiatives, staffing, etc.) Communities that already have significant funds directed to Israel Experience Programs and/or staff may choose to receive a lower matching grant than offered. Matching funds, however, must represent new funding. Funds received from UJA *must* be used only for scholarships. Budgets must be submitted to the consortium for review.

2
"rigorous"

Project

Selection Procedure:

1. The Consortium will utilize the extensive research done by CIJE to assist in selecting pilot communities. The 3 CIJE lead communities (Atlanta, Baltimore, and Milwaukee) will be approached immediately to ascertain their interest in committing to this project. We have decided to offer participation initially to these communities because of the anticipated potential benefit of integrating the Israel Experience into the overall educational changes to take place within these cities. (They will, of course, have to agree to meet all of the selection criteria.)
2. Winnipeg, where The CRB Foundation has supported community-wide initiatives in this area for the past several years, will serve as a *resource* community.² At least one additional Canadian community will be chosen from amongst Montreal, Ottawa, Toronto, and Vancouver.
3. Up to 4 additional communities will be chosen from amongst the 20 remaining applicants to the CIJE Lead Community Project. Each of the members of the management group may recommend additional non-CIJE communities for consideration. A report (with pilot community recommendations) will be rendered to the Management group by the end of October, 1992.
4. Finally, New York and/or Los Angeles, although not applicants to the CIJE project, will be considered, with at least one being a confirmed recommendation from our earlier discussions. Work in these communities will be in targeted catchment areas and will require greater commitments of matching funds from the local Federations.

¹ Please note: Winnipeg has already reached very high levels of youth participation in Israel Experience Programs, (in part through the initiative supported by The CRBF). Therefore, it is suggested that Winnipeg serve as a "resource community", given their several years of experience, and that an additional Canadian Community be chosen through the selection process, most probably Toronto.

Operational Plans:

Operational planning has just begun, however several conclusions have already been drawn:

1. While selection will include 8-10 communities, work will be phased in over the next 12-18 months, beginning in one of the Lead Communities, one Canadian community, New York or Los Angeles, and one additional community in the Fall/Winter, 1992-93. The program will expand into two additional communities in the Spring, 1993. Work in the other selected communities is expected to begin in Fall/Winter, 1993-94.
2. We expect that a major portion of Jay Levenberg's time will be provided by JCCA as their contribution to the Consortium. This will allow for the creation of small field teams to be assigned to each of the pilot communities. CRBF staff and consultants available for this role are: Mark Charendoff, Barry Chazan, Peter Geffen, Irwin Kula, Jay Levenberg, John Ruskay. Staff from the Consortium members are also available.
3. Consortium staff will be meeting on a monthly basis over the coming months.
4. A meeting of the Management group with the inclusion of the advisory committee is being considered.
5. The announcement document for the GA must be approved by the Management group and a dissemination plan and Press Release developed.

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Possible distribution schedule for UJA Matching Funds					
COMMUNITY	year 1	year 2	year3	year4	year 5
1	50000	35000	20000		
2	50000	35000	20000		
3	50000	35000	20000		
4	50000	35000	20000		
5		50000	35000	20000	
6		50000	35000	20000	
7		50000	35000	20000	
8			50000	35000	20000
9			50000	35000	20000
advance for previous year				25000	
	200000	290000	285000	155000	40000
	carry over	carry over	take advance	balance avail	balance avail
	50000	10000	of additional	95000	210000
	into year 2	into year 3	25000		
			from '96		
Total UJA Funding	970000				
5 years					

AGENDA

MEETING WITH J.B. UKELES & AH

NOVEMBER 19, 1992 -- NEW YORK

1. Write planning guidelines and self-study guide
2. Help communities with planning assignments
3. Help communities with self-study
4. Train project directors for performance management
5. His article
6. Israel visit

9

A MODEL FOR PROGRESSIVE PLANNING IN THE JEWISH COMMUNITY

Jacob B. Ukeles

AMERICAN JEWISH
ARCHIVES

INTRODUCTION

The Need for Progressive Policy Planning

The policy choices faced by the American Jewish community in both the international and the domestic arenas require the best possible analysis of policy alternatives and their consequences as well as the highest possible quality of leadership. Among the many challenges facing Jewish leaders in the United States are the need to strengthen Jewish identity and affiliation, modernize Israel-Diaspora relations, rescue Soviet Jewry, support the Jewish family, mitigate the impact of poverty and near-poverty on Jews, and maintain and enhance quality Jewish care for the elderly and the disabled.

Yet despite the demands of these challenges, the methods, tools, and data used for Jewish policy planning are often primitive. Research efforts are often postponed because, in the face of the need to resettle the remnant of European Jewry, to establish and support the State of Israel, and to strengthen Jewish life in North America, the community has been reluctant to invest scarce communal dollars in research and planning. This approach is understandable but short-sighted. Many talented volunteers and professionals in a variety of Jewish communal organizations struggle with complex problems on a day-to-day basis, without adequate methods or support. Scarce resources will go further if solutions are thought through. Even in the most forward-looking secular organization, the pressure to act does not necessarily encourage contemplation and analysis. Jewish communal institutions are no different.

Scope of This Chapter

The purpose of this chapter is to suggest a model for policy planning¹ appropriate to the Jewish communal enterprise in North America in the 1990s.

The purpose of policy planning is to improve the content and process of community decision making. By "improved decisions" we mean that decisions are more rational in the use of scarce communal resources, more humane and just in the tradition of the Jewish prophets, and more effective in improving the quality of Jewish life and reducing conflict.

There are several important caveats that limit this discussion. First, the role of lay leadership in planning and the interaction between lay leaders and professionals in the Jewish communal planning process is a very important subject requiring an exposition of its own. An in-depth treatment is beyond the scope of this chapter. In general it is assumed that professionals collect and analyze information and clarify choices while lay leaders make policy decisions, often with professionals providing recommendations. This is not to suggest that the relationship is always so clear. Second, planning for fund-raising or for resource development in general is a separate subject. Some of the principles of planning developed below are relevant, but fund-raising tends to operate as a separate field. Third, this is not a discussion of planning at the level of "technique," such as how to conduct a field survey, computer mapping, or the construction of forecasting models. Such subjects require a separate treatment and are too specific for this volume.

THE ELEMENTS OF A MODEL FOR JEWISH COMMUNAL PLANNING

The Context: The Voluntary Sector

When a Jewish community entity engages in planning, it shares some common elements with any other organization or institution. Typically, at least in North America, Jewish community institutions are part of a vast "third sector"—the voluntary or not-for-profit sector, sometimes called the independent sector. Universities, hospitals, and settlement houses are part of a huge world perched, often precariously, between the worlds of government and the private sector. Planning in the independent sector shares some elements with each. Like government, voluntary agencies respond to social rather than economic objectives. Multiple constituencies each have their own definition of the community interest. Like private industry, voluntary agencies do not have to deal with the vagaries of electoral politics or the frequent changes in direction associated with newly elected officials. Voluntary agencies are "between" the two worlds of government and the private sector in another sense as well. They often receive funding both from public agencies as well as from private sources.

A Model for Progressive Planning

173

The complexity of this context for Jewish planning, as well as the complexity of the Jewish community itself, suggests that the planning model cannot be a simplistic one. Rather, it is a multidimensioned model featuring response to at least three dimensions: first, geography or scale; second, the content of the policy agenda; and third, the size and complexity of the policy problem.

The Structure of Jewish Communal Planning

One way to organize the structure and content of Jewish policy planning is in relationship to the geography of Jewish policy making. The rationale for this approach—clearly not the only one—is that the institutions and policy issues associated with various levels of geography tend to be different.

Policy planning can take place at any one of five different scales: international, continental/national, regional, local, community, or neighborhood. A complete planning model or system would have a fully developed apparatus for planning at each level. An apparatus for planning should include a base of information and analysis and a multiorganization institution for using that information to make decisions that ideally initiate or stimulate action on a comprehensive agenda. Of course, planning on the neighborhood level only makes sense for the largest Jewish communities. The only relatively well-developed element in Jewish policy planning at the present time is the local level. The local federation is typically the most important central institution for the development and implementation of a community's Jewish policy.

Coordinative bodies involved in international and national or continental policy are limited to a narrow range of issues (e.g., the Conference of Presidents of Major Jewish Organizations or the World Zionist Congress) or are essentially advisory (e.g., the Council of Jewish Federations or the National Jewish Community Relations Advisory Committee). Much of the discussion about Jewish life does deal with international or national/continental issues, but there is no Jewish communal structure for meaningful international or national planning. A key missing factor in the domestic arena has been the failure to develop meaningful regional entities. In an informal way, communities such as Atlanta, Chicago, and Denver do play an important role in relation to their region and the Jewish life in smaller, neighboring communities. But many aspects of Jewish communal existence would benefit from formal, ongoing cooperation among communities in the different regions of North America.

In the largest metropolitan areas, "decentralization" is on the communal agenda. With Jews living in so many different parts of a metropolitan area, neighborhood planning is an important element in Jewish policy planning. In Los Angeles and New York, for example, this planning at the neighborhood or "community" level is likely to have an impact in the future on the organization of decision making, fund-raising, and service.

The Policy Agenda

While some issues or concerns exist at every level of Jewish life (e.g., maintenance of Jewish culture and identity), many issues are specific to a particular planning level.

The International Planning Agenda. This, the broadest scale of Jewish planning, is defined by the forces that affect Jews everywhere; by the movements—voluntary and otherwise—of Jews from one continent or country to another; by the relationship with Israel; and by special situations or crises in one part of the world that require the concern and involvement of Jews in other places. Facing the 1990s, the most important of these issues involves the relationship between Israel and the Diaspora, the development of a Soviet Jewish community and resettlement of those who can leave; and rescue and relief of oppressed Jews (Arab countries and Ethiopia). Existing international programs in Jewish culture and education in the effort to enhance Jewish identity are likely to be expanding in the coming years.

The Continental/National Planning Agenda. National levels of Jewish planning are defined by issues specific to a given continent or country that are likely to affect many or all Jews within that area. For example, differences in climate, economy, history, and the dominant culture are likely to create different Jewish agendas in South America and in Europe. In North America, the Jewish agenda is deeply affected by relationships between the Jewish community and the federal government among different groups of Jews and between Jews and non-Jews. The movement of Jews from the older cities of the Northeast and the Midwest to the Sunbelt creates problems and opportunities that should be dealt with nationally. The sometimes conflicting goals of maintaining Jewish unity while respecting Jewish pluralism need to be addressed nationally. Current concerns about the recruitment and Jewish education of future Jewish leaders is similarly a national issue.

The Regional Planning Agenda. By definition, the Jewish planning agenda in each region of North America is likely to be different. Geographical areas that are experiencing Jewish population growth have different problems than do areas that face Jewish population decline. Some issues may more appropriately be addressed at the regional level. For example, the organization and management of services to Jewish college students is increasingly being viewed in a regional, rather than a local or national, planning framework. While national policies regarding the recruitment of Jewish educators are needed, the development of specific programs to recruit, train, and place Jewish educators—principals and teachers—is likely to be pursued most sensibly on a regional basis.

The Local Planning Agenda. Local agendas are diverse and often differ from area to area. In some communities, maintaining ties between the Jewish and non-Jewish populations is crucial; for example, as Jewish leaders work to maintain a broad coalition with racial or ethnic groups, both to ensure Jewish security and to retain government funding on a local level for critical human services.

In many localities concern about intermarriage and identity loss has fueled greater interest in and support for Jewish education. Developing appropriate strategies for caring for an increasingly varied and much older population of Jews is such an important theme that perhaps it belongs simultaneously on the local and on the regional, national, or international agendas as well. Programs for Jewish singles and for the growing number of single-parent families are also increasingly important elements in local Jewish planning agendas.

The structure and content of policy define two dimensions of the planning model; the nature of the policy problems themselves provides another.

TYPES OF PLANNING PROBLEMS

Policy problems range from the general to the specific, from the complex to the not-so-complex. Planning studies can take several years with reams of data or a few weeks with limited data and a good deal of "expert opinion." For example, a community-wide policy on the response to Jewish poverty could involve a process of research, policy formulation, action demonstration, and evaluation, costing many thousands of dollars and taking several years to design. At the other extreme, a donor or foundation might make a grant available for a weekend volunteer-based feeding program for the poor, if the site could be selected and the program set up within thirty days.

A system of four classes of policy problems is helpful in thinking about, and engaging in, Jewish communal planning: (1) issues; (2) programs; (3) priorities; and (4) strategies.

This sequence of types of policy problems is distinguished by increasingly complex policy questions and an increasingly broad policy-making environment as one moves from "issues" through "programs" to "priorities" and "strategies." A planner facing the task of developing a "strategy" needs to respond with a wide range of alternatives based on broad criteria, and must have substantial lead time and resources to conduct research and collect information. A planner facing the resolution of an "issue" typically needs less time and data, and can be satisfied with fewer alternatives and criteria.

Issues

Issues are a class of policy problems that require relatively specific policy choices in a policy-making environment that includes a relatively small number of clearly defined decision makers. Often the range of alternatives is effectively defined by the agency framework where relatively narrow criteria apply (e.g., time, cost, feasibility, and limited definitions of effectiveness). Under such circumstances, it is appropriate to assign a limited amount of time for data gathering and analysis. Assessments of probable consequences of alternatives are likely to be highly conjectural. Given such a problem, a planner is likely to do relatively little original research, and is more likely to rely on existing data

sources, careful interviewing of actors in relation to the problem, and previous studies.

Any specific community decision can turn into an "issue"—if important decision makers or the constituencies they represent disagree or are uncertain about how to proceed. Issues are often precipitated by a crisis or a new opportunity.

Case Example: Issue. An old nonsectarian summer camp on a beautiful site has run through its endowment income and is about to close. Its predominantly Jewish board is prepared to offer the site to the local federation, free of charge, if they agree to operate it as a Jewish camp. The decision must be made in several weeks or it will be offered to a nonsectarian sponsor.

Some community decision makers are enthusiastic—focusing on the tradition of service to be maintained, the belief that the community is short of quality camping facilities, the beauty and economic value of the site. Others are skeptical—worried about maintenance costs and the restrictions on future use—and remind other leaders of a previous bad experience with a "white elephant."

The planner is asked to assess the pros and cons of accepting the site and to come up with a recommendation. This is a classic issue—short lead time, limited options, many unknowns, and controversy. Clearly, such a situation does not allow one to ask and answer fundamental questions (e.g., the total need for camp slots), nor to develop new programs (e.g., family camping for single-parent families). One is constrained by existing programs and is limited to shorthand methods of estimating needs and costs. The issue is defined, ideas about alternative uses of the site are collected, the costs and benefits of each recommendation are assessed quickly, and a recommendation is made. The process of developing a recommendation includes some negotiation with the existing camp board to allow for long-term use of the site for other than camp purposes, thus reducing the opposition to the acceptance of the gift.

The next, somewhat larger policy problem involves decisions about entire programs.

Programs

This class of policy-planning problems involves the development, review, and evaluation of specific types of service or response to needs. Program planning and priority planning (the next class) involve policy problems and appropriate analytic tools of intermediate complexity and scope. Program studies tend to be somewhat more general and longer-range than planning to resolve issues. Thus these problems lend themselves to somewhat broader efforts at information-gathering and analysis and involve more decisions than planning to resolve issues. Jewish communities are often involved in program design—the development of new programs to respond to new problems or to renew the communal attack on old problems. Communities or organizations have recently launched programs

A Model for Progressive Planning

177

to combat homelessness, to support Jewish AIDS victims, and to provide Jewish education to board or professional leadership.

Central organizations—federations or foundations—frequently review programs that already exist: deciding whether or not to fund, to renew or not to renew a previous grant, to expand or keep the funding at the same levels. For example, the board of a community center may call for a review of a program for teens or of one for single-parent families.

From time to time (although not often enough) a Jewish organization will launch a full-scale evaluation of a program (e.g., a summer camping experience for older persons). Such a review might focus on the extent to which a program's objectives are being met and on the balance of costs and benefits to participants and to the community at large.

Needs assessment is often an integral part of program design or evaluation. However, the question "is this program really needed" too often is answered subjectively—based on a limited number of anecdotes about a few individuals. While "needs" cannot be measured scientifically, one can move beyond the purely subjective.

Estimating needs for services involves significant problems of measurement. Statements about need contain value judgments. For example, looking at the same population, two observers will draw different conclusions about the number of day care slots needed, if the first believes that day care suits only children 2 years or older, and the second believes that day care is appropriate for children of 6 months and older. Thus, there is a subjective component to needs assessment.

Second, objective data about needs and about services are hard to assess. For example, there is little information about the amount of services actually being delivered, and even less information about the quality of service. It is even more difficult to find information on the degree to which services are utilized or how much people would use the services if they were available.

At best, only an approximate measure of need is feasible. Some analysts have relied on the judgment of key informants to overcome these difficulties; others have tried to "mine" such quantitative measures as are available. Both approaches should be used.

Data analysis, the first method, compares data on the number of people in each population group (likely to be in need) to the amount of service available within a specific geographic area, or in the entire city. Thus if one analyzes the need for home care service for the elderly, the relevant data involves the number of older persons (by age category: e.g., 60 to 69, 70 to 79, 80 and over; and possibly also by income level); the hours of home care service currently available (by type and cost of program); and a standard to suggest whether more home care is needed.

Standards of judgment are sometimes relative—perhaps based on the percentage of older persons living in the neighborhood being studied compared with the percentage of home care slots available in the same neighborhood. Comparing the percentage of people in a particular population group in a region with the

percentage of services provided that population in the region will show whether or not that population is receiving its "proportionate share" of the community's services.

In other cases, standards of need may be absolute (i.e., the hours of home care that should be provided—based, for example, on guidelines set by a national authority—per hundred older persons multiplied by the number of older persons in the area). This need would be compared with the amount of service available to get an estimate of the "net need" or size of the service gap.

In addition to the data analysis, information about service gaps is also derived from expert judgment, the responses of knowledgeable persons. Key informants might be professionals, board members of relevant agencies, or service users themselves.

Priorities

Jewish communal organizations face the classic allocation dilemma of central funding organizations: needs typically outweigh resources. This general problem is exacerbated by a particular one: Jewish communal fund-raising nationally is growing very slowly. Thus, for the foreseeable future in most communities there will be a relatively small amount of new money each year.

The purpose of a community priority system is to ensure that scarce communal dollars are allocated according to the community's priorities. Establishing priorities for any community is extremely difficult because of the multiplicity of constituencies and their differing values. A particular service may be very important to one group and unimportant to another. The challenge is to design and implement a system that integrates and balances varying perspectives on need.

In principle, it would be desirable to base community priorities on an assessment of *unmet needs*: the gap between the needs of a specific population and the available services equals unmet needs. The larger the gap between what is needed and what is available, the more acute the unmet needs, and, by extension, the more urgent the priority to provide more of that type of service.

It is easier to reach agreement about priorities where life and death are involved: nutritional needs of the elderly, for example. It is more difficult to assess the need for services such as those offered by community centers. Some services are used by the entire community rather than by any particular individual—such as activities on behalf of Soviet Jewry or neighborhood preservation.

Since the focus is on setting priorities, it is sufficient to develop a sense of relative needs rather than to attempt the more difficult task of measuring absolute needs.

Three dimensions of priority are relevant: services, people, and geographic areas. Thus a priority-allocation system should be able to support comparisons among different kinds of services, different groups of people, and different geographic areas.

The three dimensions of choice identified above—services, people, and geo-

A Model for Progressive Planning

179

graphic area—need to be spelled out concretely in three classifications. The geography of the service area needs to be divided into meaningful segments, a definition of population groups established, and a program or service classification selected.

The identification of useful criteria for decision making involves the identification of relevant values; for example, giving the highest priority to programs that serve those in greatest need. It also requires the specification of an index or standard to provide a way to measure need.

Especially in the design of an initial information system, criteria need to be relatively simple and relatively few in number. Often "surrogate measures" are used when we cannot measure need directly; so we measure it indirectly, such as using a per capita distribution of an existing service to rank geographic areas.

Using criteria to rank possible programs, areas, or population groups requires the collection of information. This information makes it possible to develop and apply the standard, whether the focus is on client populations, unmet needs, or where the greatest needs exist. Collecting useful information is costly, and there are limits to the amount of information that can be absorbed by decision makers. It is difficult to conceive of managing the complexity of priority choice in all but the smallest communities without using a computer. There are a number of possible approaches: at a minimum, one should use a computer to store information and produce specified reports on a prearranged schedule. At a maximum, one could develop an interactive system in which an individual decision maker can be presented with a series of computer screen menus relating information to the choices to be made. The consequences of each set of decisions could be computed.

Strategies

Strategic analysis defines a class of policy problems in which the policy problem is very large—an economic development strategy for a region, for example. The policy-making environment is diffuse and likely to involve many decision makers as users of the analysis. Alternatives developed in such an environment should be more wide-ranging, involving the search methods designed to generate alternatives and broad criteria focusing on short- and long-range costs and the probable effectiveness and impact from a variety of points of view. Such problems are likely to have substantial lead times for research, such as the opportunity to generate primary data through surveys.

The purpose of strategic planning is to chart an overall direction for an agency—not a detailed blueprint for action. Strategic planning is an ongoing process—rather than a one-time effort. The document called the strategic plan is a summary of the strategic thinking of an organization at a particular point in time. Sensible strategic planning is mid-range: a time horizon of three to five years is the maximum feasible given the uncertainties of communal organizational life. The heart of a strategic plan is a mission statement.

A mission statement should project a clear view of the self-image of the organization; what it seeks to accomplish and how it relates to the community; whom it seeks to serve and how. The purpose of the mission statement is to suggest priorities for action, and the overall emphases in the organization's program. A good mission statement conveys not only what the organization is trying to be but also what it is *not* trying to be. The process of developing a mission statement should itself be a community-building exercise, involving representatives of key constituencies along with board and professional leadership. Most important, *the process of preparing a mission statement should confront and resolve major choices of direction facing the agency. Conflicts over role and purpose should be dealt with openly and not papered over.*

THE USES OF STRATEGIC PLANNING

Strategic planning should *guide* (and not determine) specific decision making in many areas, such as:

- Client-group emphases
- Service/program mix
- Location/facilities
- Public image and communications
- Budgeting
- Fund-raising
- Board development
- Staff development

In the previous two sections of this chapter, two dimensions of a planning system have been defined: geography and type of policy problem. In the next section, a general method for Jewish policy planning will be suggested.

A GENERAL METHOD OF JEWISH POLICY PLANNING

The literature of planning over the last thirty years has been dominated by the debate between the rationalists and the incrementalists. The classic theory of planning is rooted in the theory of rational action. It posits a model that begins with the establishment of a goal; the identification of alternative means to attain the goal; the collection and analysis of information bearing on the relationship between means and ends (such as the probability and degree or value of goal attainment associated with each of the alternative means); and the selection of the means with the highest expected value (the highest probability of attaining the highest possible level of goal attainment).

In response to this model, the incrementalists have argued that in the community setting (typical of the voluntary sector, including the Jewish community)

A Model for Progressive Planning

181

or the governmental setting, it is extremely difficult to reach agreement about goals. In the Jewish community, different constituencies—defined by ideology, socioeconomic status, age, etc.—are likely to approach different community issues with different images of the appropriate goals. In any event, the cognitive burdens of ascertaining (or predicting) all the possible means and the expected value of each means-goal combination are too great.

In contrast, incrementalists have suggested that community or governmental decision making involves a mixture of competition and cooperation among competing interests in which the "public interest" is analogous to the unseen hand of the economic marketplace. People strive to agree on means without necessarily agreeing on or even explicating goals.

In effect, the incrementalists make a case against planning. Yet those who see the world as eminently improvable, wonder: if the unseen hand is so beneficial, why are there so many obviously unsolved communal problems? Increasingly, planners are recognizing that there is a "middle way." Unlike the pure rationalist, they have no expectation that specific community goals can be set and agreed to or that all the alternative courses of action can be identified. There is an acceptance of the reality and legitimacy of a variety of interest groups competing with one another for their own interests.

On the other hand, unlike the incrementalist, the modern community planner believes that systematic analysis of appropriate facts and an effort to explicate relevant values can yield a better community result than the clash of competing interest-groups alone.

While every locality and every policy problem is unique, the following general steps are applicable.

Step One: Identify the policy issue or problem needing resolution in the community: In a community planning process, the first critical step is to reach agreement among participants as to what the problem or issue is. While this step seems obvious, the formulation of the problem is often left implicit. In almost any kind of problem solving, a useful problem definition is at least 50 percent of the solution. For example, a committee looking at the status of Russian Jewish immigrants in a community might do well to reach agreement as to whether the critical concerns are in the area of resettlement; in the areas of jobs and housing; in the area of acculturation to American norms, such as voting participation and literacy; or in the area of Jewish acculturation, in levels of participation in Jewish educational and cultural activity. An agenda for a comprehensive planning study might include all three issue sets, but the planner(s) should explicate the decisions to be made and the areas of concern.

Step Two: Assess the policy-making environment within which the policy problem or issue resides. Deciphering the environment of a policy decision is like preparing a road map of an island before climbing to its summit. Planning does not take place in a vacuum. Establishing a committee, commission, task force, project, or study to develop policy normally means that important individuals or groups in the community have become concerned about a subject or issue. It

is rare for any issue to be completely new. One needs to understand the sources of concern that lead to the new focus or interest.

In undertaking planning, it is important to develop an early and systematic understanding of the decision makers and other actors likely to affect the outcome of a planning recommendation, the agency or agencies likely to be involved, and the constituencies with a stake in the outcome.

Step Three: Identify policy options that represent alternative ways to resolve the policy issue or problem. Once the policy problem or issue is defined and a "road map" of the policy environment is developed, the next step involves the search for possible solutions or resolutions.

The development of policy options is likely to involve substantial information gathering and analysis—interviews with decision makers, service providers and users, analysis of recommendations or actions in similar situations in this or other communities, brainstorming with "wise people," and construction of decision trees or options graphs to clarify choices. The product of this step is a list of two or more alternative possible courses of action or options.

Step Four: Identify the criteria that are relevant to choosing among alternatives. The purpose of this step is to specify the criteria or standards relevant to choosing among the alternatives identified in step three above. In the multi-constituency environment typical of Jewish communal life, different criteria reflecting different values are likely to be important to different groups. The policy analyst seeks to define criteria reflecting a range of values representative of the concerns of different groups.

The extent to which different options are likely to advance particular values can be seen as "measures of effectiveness." Thus in selecting among alternative sites for a community center, one site may be more "effective" in terms of its accessibility to older persons living in a next-door senior housing development and another site may be more "effective" in terms of its accessibility to families because of superior parking. In addition to "effectiveness" measures, criteria are likely to involve considerations of cost, timing, and feasibility.

Step Five: Assess the pros and cons of each alternative in terms of relevant criteria and identify the preferred solutions. The fifth and final step in the planning model involves an effort to predict the consequences of each option or alternative in terms of each criterion. If a reasonable estimate can be made of the probable impact of each option, the pros and cons of each option can be constructed: "pros" are a likely positive outcome with regard to a criterion or value. In almost any planning situation, the selection of an option involves "tradeoffs," weighing different mixes of gains and losses.

The results of such a process are illustrated in Table 9.1. The pros of the first option are effectiveness in terms of the first criterion, and low cost. The "cons" are low effectiveness in terms of the second criterion and slow implementation speed. On the other hand, the "pros" of the second option are effectiveness in terms of the second criterion, and probable speedy implementation; the "cons" are low effectiveness in terms of the first criterion and high projected cost. Each

Table 9.1
Criteria—Alternatives Matrix

	Effectiveness Criterion 1	Effectiveness Criterion 2	Cost	Feasibility	Time
Option A	Not Effective	Effective	High	Feasible	Fast
Option B	Not Effective	Not Effective	High	Feasible	Slow

In this table, it can be seen that the problem comes down to choosing among two options (e.g., two sites for a geriatrics center; two plans for combatting homelessness; two different policy proposals for enhancing the Jewish family, etc.); and five criteria—two kinds of “effectiveness” or value satisfaction criteria; cost; feasibility (e.g., community acceptance); and time (e.g., time to implement).

of these options appears to be feasible. Thus the analyst's contribution in this case is to provide the basis for eliminating other options (which might have substantial political support), and clarifying the choices or tradeoffs involved in choosing the first or second options. This five-step model is adaptable to a wide variety of policy-planning situations and problems. But as described above, policy planning can range from large comprehensive, multiyear studies to relatively quick "think pieces" or policy responses on a specific issue or decision. The "client" could be an international organization or a neighborhood group. The model does have to be adjusted to fit the specific circumstances.

CONCLUSIONS: TOWARD A COMPREHENSIVE PLANNING SYSTEM IN THE JEWISH COMMUNAL SETTING

Planning implies coordination and some degree of centralization. It suggests a rational process of decision making rather than one based on whim, emotion, or power alone. It implies a balance between the use of information and infusion of relevant values; it involves content as well as process. Jews venerate the past and live in the present. History has taught us not to expect too much from the future. We tend to be crisis-responsive, reactive, and not proactive. Yet unless we plan more systematically, complex problems will linger instead of getting resolved. Precious time, money, and energy will continue to be wasted in duplication of effort in some areas while other issues will fall between the cracks.

While the commitment to communal planning, at least at the local level, seems to be growing in North America, we have a long way to go. In all of North America, there is no national Jewish policy think tank—no Brookings Institution, no Kennedy School, no Rand Institute. The last such effort—the Institute of Policy Analysis of the Synagogue Council of America—died through lack of support.

A serious commitment to a planning system—one capable of dealing with issues, programs, priorities, and strategies at the global, continental/national, regional, metropolitan area, and neighborhood level—requires a radical reorganization of Jewish life, a radical change in the recruitment and training of Jewish professionals, and a major commitment on the part of Jewish lay leadership to a new way of doing business.

In the early part of the twentieth century, in community after community, Jewish federations were forged to bring order out of chaos in Jewish organizational life. Today, nothing short of such a major effort on a global, if not a national level, will bring Jewish communal planning to a central role in communal life.

NOTE

1. The terms "policy planning," "social policy analysis," and "policy analysis" will be used interchangeably in this chapter. Policy planning is defined as the development

A Model for Progressive Planning

185

and presentation of policy options, together with pros and cons of each option. The process uses explicit criteria, projects the probable consequences of alternatives, and makes explicit value judgments about various outcomes. The approach is issue-oriented and data-intensive.

*When ... version
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meeting*

[draft 10-21-92]

Lead Communities Planning Guide Preliminary Outline of Contents

I. Analysis of needs

A. Profile of current community demographics:

1. General population characteristics: cohort sizes
2. Other Jewish education sub-group sizes (e.g., early childhood, supplementary school, day school, lay leaders, adult education learners, communal service professionals, college-age youth, other special groups)

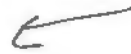
B. Profile of present Jewish education personnel

1. Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood ...) by institution/program
2. Skills, expertise and background

Handwritten notes in a bracketed area next to B.1 and B.2.

C. Program capacities and participation rates (formal and informal programs, by institution/program)

D. Estimate of community need/demand (in categories of A2 & B1)



E. Gaps [D - C]

II. Assessment of strengths and weaknesses (What works, what doesn't work)

A. Areas for assessment

1. Students and programs (e.g. levels of attainment)
2. Personnel
 - by program: quality, assets and limitations
 - professional development programs and opportunities
3. Community support
 - Lay involvement and leadership
 - Coordination and collaboration within system
 - Funding: Amounts and participation rates
4. Other system and planning issues (e.g.):
 - Fundraising and allocations
 - Information (system capabilities)
 - Uses of technology

B. Exploratory comparisons (Programs and performance in other places)

*Call
Isaiah
what
time
Karna
any
...
...
...*

*Specify the range within
mean*

III. Strategic issues (confronting and resolving critical choices)

- A. Identify strategic choices
- B. Resolve strategic choices
- C. Develop community-wide mission or vision statement(s)

IV. Establishing strategies and priorities

- A. Formulate strategies
- B. Establish priorities
 - 1. Population groups/program areas
 - 2. Personnel
 - 3. Community support

V. Designing programs (to address priorities)

- A. Initiate program ideas or strategies/preliminary proposals
 - 1. Leadership (lay and professional) and community support (e.g.):
 - coalition building
 - recruitment (of leadership and community involvement)
 - 2. Programs for personnel - *Building on...*
 - 3. Programs (e.g.: Israel trips, innovation)
 - 4. Planning and evaluation *Management of implementation*
 - 5. Financial resources

B. Select program priorities/phasing

VI. Prepare implementation strategy: multi-year framework, first year action program

- A. Program/Task
- B. Responsibility
- C. Cost and funding
- D. Timetable
- E. Performance Management
- F. Program Evaluation

VII. Next Steps: Implementing the plan

- A. First-year action plan oversight
- B. Mid-course modifications
- C. Prepare second-year action plan

APPENDICES

General format for each section

Section heading

Rationale: What the section is about, why it is important, how it relates to the planning process.

Deliverables: Important junctures, or deliverables, and when they must be completed to keep the project on schedule.

Benchmarks: Critical requirements and optional steps/tasks to achieve the benchmarks for the phase.

Methods: "How" to do the task.

Comment Box

For elaborative comments, suggestive hints, or enhancement options.

Point person(s): Recommendations on who should oversee task, and who needs to be involved or have input.

Time guidelines: Approximate minimum/maximum time to set aside to carry out task.

Examples:

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128 • New York, NY 10003
Phone: (212) 532-1961 FAX: (212) 213-4078

TELEFAX

TO: Annette Hochstein **DATE:** November 6, 1992

FROM: Jo Ann Schaffer **FAX #:** 619 452

Number of pages (including this sheet) 2

MESSAGE:

THE ATTACHED HAS BEEN FAXED TO THE LEAD COMMUNITIES.

PLEASE HOLD THESE DATES

MONDAY, NOVEMBER 23

AND

TUESDAY, NOVEMBER 24

The Council for Initiatives in Jewish Education will host a dialogue in New York with Atlanta, Baltimore, and Milwaukee planners on immediate and long-range plans for the revitalization of Jewish education through its Lead Communities Project.

We will begin with dinner at 6:00 p.m. on Monday and continue till 4:30 p.m. on Tuesday. Please contact Jo Ann Schaffer at (212) 532-1961, if you would like her to make hotel arrangements for you.

MEMORANDUM

To: Annette Hochstein
From: Jack Ukeles *Jack*
Date: October 5, 1992
Re: Lead Communities Letter of Understanding

לד"ר מ'ח' מ'ר' מ'ר'

I am writing to continue our discussion about the Letter of Understanding on Lead Communities. I had hoped to have a teleconference before Art left for Europe, but we were not able to get it together, because of chagim and individual schedules.

As I understand it, you and Seymour have two major concerns:

- 1) that the draft letter does not appropriately convey the idea that the Lead Communities Project is about systemic change, it sounds like just another commission.
- 2) that the document needs to include much more of the specific content of the Lead Communities Project as envisioned in "A Time to Act" and subsequent materials.

We may have a disagreement about the nature and purpose of this document; we may also disagree about how to generate change.

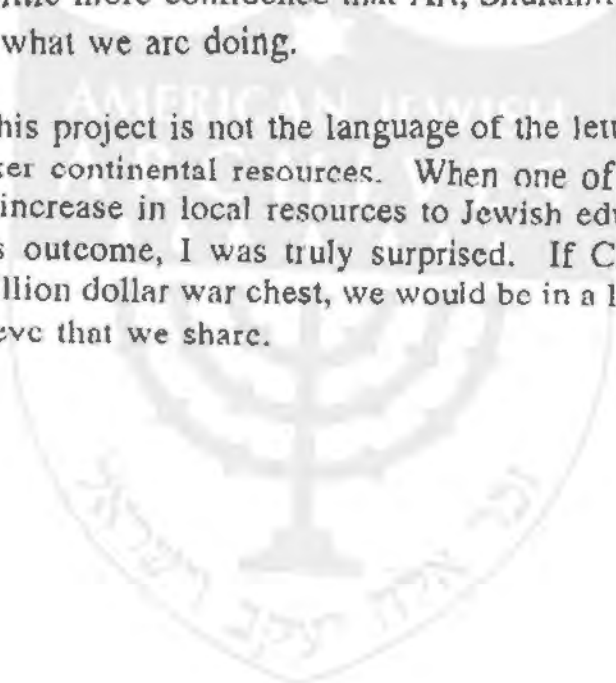
I believe that we need to do it, not talk about it. The Letter of Understanding represents talk, not deeds; the longer we spend processing the Letter of Understanding, the more frustrated everyone will get. Our initial visits to the three communities where we talked through the draft document (but didn't give them anything in writing) reveals that:

- 2) they now know what CIJE brings to the collaboration and what is expected of the communities.
- 3) they want to get on with it.

The only way to develop a commitment to systemic change is to work with the communities in a careful year-long educational process. That should be our goal for this year's work -- their plan should be a concrete expression of the maximum that is achievable.

I understand your anxiety given all that you and Seymour have invested in this. But I look for a little more confidence that Art, Shulamith and I share your basic vision and know what we are doing.

The real risk to this project is not the language of the letter of understanding, but the effort to broker continental resources. When one of the CIJE "fund-raisers" projected a 10% increase in local resources to Jewish education as an acceptable lead communities outcome, I was truly surprised. If CIJE had a solid plan to assemble a ten million dollar war chest, we would be in a lot better shape to pursue the agenda I believe that we share.



Handwritten notes in a box: "11-05-92" and "11-05-92" with other scribbles.

Program

Monday, November 23

- 6:00PM Welcome
Workshop Introduction Art Rotman - *Shulamith Elster*
Jack Ukeles
- 6:30PM Dinner *(meal & guide)*
- 7:30PM ~~Towards Systemic Change in Jewish Education~~
~~The Genesis of the Lead Communities Concept~~ Seymour Fox
Annette Hochstein
Idea of and implementation of
- 9:00PM ~~Open Discussion of the Lead Communities Project~~ Shulamith Elster
introduce tomorrow's agenda Annette Hochstein

Tuesday, November 24

- 8:00AM Coffee *"Lead Communities at work"*
- 8:30AM ~~Review of Lead Communities Planning Calendar~~ Jack Ukeles
= Progress in the community
- 9:00AM A sketch of each Lead Community as a context for improving Jewish education Art Rotman & Jack Ukeles
and staff members
 - Atlanta
 - Baltimore
 - Milwaukee
- 10:30AM ~~A Portrait of a Lead Community (Plan)~~ Shulamith Elster
- 11:30PM Planning Guide Jim Meier
- 12:30 Lunch
- 1:30PM Connections
 - Introducing Best Practices Barry Holtz
 - The Talent Bank Jim Meier
 - Continental Educational Resources Shulamith Elster
 - Continental Financial Resources Shulamith Elster
- 3:00 Issues Jack Ukeles
 - *CJK* *copy* Toward a common language: what do we mean by "improvement"; "system"; "settings" "populations" "and "programs" *what's what?*
 - How should the CIJE staff interact with the Community staffs
 - When should we work as a foursome and when as a set of doubles? *stand out*
 - Where in the process it makes sense to have a community-specific approach and where it makes sense to have a general North American Approach.
 - Agenda: Timing and content of Meeting in January with execs and lay leadership
- 4:30 Adjournment

Handwritten notes on the left side: "has not", "7:30", "11:30", "13:00", "13:00".



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November 6, 1992

Dr. Julie Tammivaara
Somewhere in America

Dear Julie,

Sorry I haven't been able to respond sooner to the revised interviews. I intended to take time to think about them, but not this much time! In general I am delighted with the progress you've made, and have far fewer suggestions this time. I think the division into background, preparation/mobilization, and professional lives is fine, as long as it is understood that questions about vision appear within these sections. It should be clear that we are not abandoning questions about vision, but are taking a more subtle approach because at this stage visions are, as you put it, "very nascent in the communities if (they) exist at all."

Background questions

In your cover letter, you say that this section is, in part, for "demographic purposes." What do you mean by that? Do you expect the sample of respondents to be representative in some way? If so, in what way(s)? I think that would be a major enhancement to the study if that is so--for example, if the interviewees represent educational leaders in the community, or the most active federation lay people in the community, or any subset(s) that can be clearly described.

How will you introduce the background questions? What will you say to lead into them? I want to alert you to two sections I see as sensitive: the section on marital history, and the section on religious practices. I think it will take all your skill to ask these questions in a non-threatening way.

I think it is unfortunate that you have not been able to pilot the questions. I think that would be useful, especially for Roberta, who has the least experience in this type of interviewing. (Hi, Roberta!) I suggest that Roberta try to pilot the questions--from this section and the professional lives section if that is to be used in Milwaukee--with a Jewish educator in Madison during the next week. You could then have a de-briefing session just before you begin to use the interviews in Milwaukee. The de-briefing session would both help Roberta reflect on how best to carry out the interviews, and would warn you and Claire of any difficulties in carrying out the interviews.

*Write the
out of sequence
signature -
no action
no mechanism
No agreement yet
no planing
then think
there is
something?
Is this
out of
sync?*

Preparation and mobilization

Combining prep. and mobil. was a good idea. The heading to this section says, "Questions for Jewish Educators," but surely these questions are not just for the educators, right?

Given both the partly retrospective nature of this section, and our desire to monitor change in issues addressed by this section, it seems important to ask these questions during the fall visit. Is that the plan?

There is one set of questions I'd like to ask you to add to this section. I think we need to know what the participants think a lead community is, and what good they think it may do for them to be involved with the CIJE. I suggest the following questions, perhaps to come after question 9:

What does the term "lead community" mean to you?

What benefit, if any, do you see from (name of community)'s designation as a lead community?

- Do you anticipate benefits for the community as a whole?
- Do you anticipate benefits for specific institutions within the community?
- Do you anticipate benefits for American Jewish education outside this community?

I am, of course, open to your suggestions for modifications to these questions. I am getting a sense that l.c. means different things to different people, and if so I think we need to document that.

Professional lives of educators

I think these questions are superb.

I assume that not all educators will be asked the preparation/mobilization questions, since not all were/are involved with the CIJE so far. For those who've had little involvement with CIJE, I suggest that you ask a few general questions--e.g. "Are you familiar with the CIJE? Have you heard about (name of community)'s designation as a lead community? What have you heard? What do you think about it? What, if anything, will it mean for you or your work?"--and then go on to questions 12 through 26 from the preparation/mobilization questions. This will let us know whether these educators have heard of the CIJE and of the community's designation as a l.c., and whether they have or anticipate having any involvement.

Implications of my comments

The implications of my suggestions for who gets asked what are:

- (1) Everybody gets asked the background questions. In addition:
- (2) People involved with the CIJE lead community process get the preparation/mobilization questions; and

(3) Educators get the professional lives questions. Educators also get some preparation/mobilization questions--those who are involved with CIJE so far get all of them, those who are not (yet) involved get a shorter version.

How does this fit with your plans?

Good luck in Milwaukee! I am eager to hear how it goes.

Best,

A handwritten signature in cursive script that reads "Adam".

Adam

P.S. Since there's a chance I'll miss you in Spokane, I am also faxing this to Roberta. Please contact Roberta and arrange for one of you to send this to Claire also. Thanks.

BACKGROUND QUESTIONS

FAMILY

Date of Birth: _____ Place of Birth: _____
(Continent, Region, Nearest large city)

Religious Denomination: _____ Congregational Affiliation: _____

Profession: _____

Siblings: (Name, Gender, Birth Order, Religious Denomination)

Parents: (Name; Biological, Step, or Fictive; Religious Denomination)

Marital Status:

Never married _____ Married _____ Divorced _____ Widowed _____

If married, widowed, or divorced, name, origin, and religion of spouse(s):

1st _____
2nd _____
3rd _____

Children: (Name, Gender, Status [biological, step, adopted]), Religion)

Family origin:

Region: Paternal side _____

Maternal side _____

Approximate date of immigration to USA: Paternal side _____

Maternal side _____

Religious Practice: AMERICAN JEWISH
 A R C H I V E S

Pesach _____
 Chanukah candles _____
 Shabot candles _____
 Kashrut _____
 Shomer Shabot _____

EDUCATION

Formal: (Place, Type, Number of Years)

Pre-School: _____

Grammar School: _____

High School: _____

College: _____

Informal: (Adult Education, Trade School, Religious Instruction, etc.)

COMMUNITY

If relevant,

Current Role: (Note whether professional or lay, time in role,
circumstances of entering)

Participation in non-role Jewish activities: (Note type, level, when)

Participation in non-Jewish activities (current):

1. How would you describe the Jewish community in (name of city) to a friend who lives far away?
2. What are the biggest pleasures you derive from this Jewish community?
3. What are some challenges facing this Jewish community?
4. Think for a moment about Jewish education in (name of city).
 - a. Including all forms of education for all ages of individuals, which is strongest in (name of city)?
 - b. Which is most in need of attention?
5. Have you ever been to Israel? _____ *If yes,*
When did you go, for how long, for what purpose?

General Concerns:

Family:

Place of Birth could be problematic as national borders have changed over the years and cities have been renamed or possibly disappeared altogether. I think getting the general region will be adequate.

Siblings could be problematic if parents have remarried. Should we get more specific information, i.e., whether half- or step-siblings, etc.?

Marital Status is also problematic; one could be never legally married but have children with a long-term companion, for example. If married, divorced, and/or widowed, indicate how many times in blanks.

Children may present a problem if marriage was mixed. Probe for religious orientation and practices in those cases. For example, a child may be Jewish but participate in Christian practices with the non-Jewish parent. A mixed marriage might include the practice of a "Chanukah bush" emulating a Christmas tree in December; is this important? Children have been known to convert upon marriage. Need to get enough information so these determinations can be made.

Family Origin is an attempt to get at ethnic origins. In some cases, this may be very complex, e.g., if residence in U.S. is especially long term. The idea is to get a general sense of origin on both sides of the family.

Religious Practice is taken from Himmelfarb's Gutman scale of practice as detailed by Roberta. While individuals and families construct very different patterns of practice, for our purposes, this scale seems most useful.

Formal Schooling refers to primary, secondary, and tertiary forms of schooling sanctioned by the state. Specialty schools whether religious, vocational, or recreational are referred to as *Informal Schooling*. I would put non-degree courses of study in the category of "informal schooling."

Current role refers to the individual's publically acknowledged, formally defined role in the Jewish community, e.g., teacher in day school or executive director of federation. For many parents and students, this question is irrelevant.

Participation in non-role Jewish activities refers to those things the individual participates in beyond what is required of his or her role. Appropriate activities include but are not limited to: summer camps, Jewish sororities and fraternities, retreats, fund-raising activities, memberships in Jewish organizations (Hadassah, B'Nai Brith, the Anti-Defamation League, Simon Wiesenthal Foundation, etc.), and recipient of Jewish-oriented periodicals.

Participation in non-Jewish activities should include community, national, and international activities not specifically identified as Jewish. This would include political activities, humanitarian groups, fraternal organizations, and the like. We should attempt to discern the motivation for such participation, i.e., whether as bridge building between Jewish and non-Jewish community or as a move toward assimilation.

Roberta Goodman
Claire Rottenberg
Julie Tammivaara

Questions for Jewish Educators

20 August 1992
edited 11 October 1992

PREPARATION AND MOBILIZATION

This interview focuses on the evolution of a community's involvement with the CIJE. It is in part retrospective, in part prospective. The intent is to identify the sequence of events that led to involvement and the people who played a part in the realization of relationship.

n.b. Need to keep in mind who are the mobilizers, who are the mobilized.

1. (Name of community) has negotiated a relationship with the CIJE. I am interested in how this relationship began. Think back to when you first learned of the CIJE. When was that and how did you learn of it?
2. What were your thoughts when you first learned of this project? (Probe: what advantages did you consider? What misgivings (if any) did you have?)
3. What were your first steps after having learned of this project? (Probe: what did you do? With whom did you do it?)
4. Who do you see as the key people involved in motivating (name of community) to become involved in this project?

Briefly describe each person and the gifts they had to offer this effort.

5. Did you personally contact anyone outside (name of community) regarding this project? *If so*, whom did you contact and what did you discuss? (Get names of any formal leaders of CIJE, e.g., Morton Mandel, Seymour Fox, Annette Hochstein, Shulamith Elster, etc.)

What advice did you receive from those you consulted?

6. How has your idea of this project changed from when you first heard of it to the present?
7. What were the biggest challenges to getting the proposal prepared?
8. Who took the major roles in preparing the proposal?

*art of
spreads*

9. Who planned the presentation to the site visiting team? Were there objections to the way it was planned? *If so, what were they?*
10. One of the aims of the CIJE is to work with a full coalition of representatives of the Jewish community. What different groups became involved and how was their participation assured?
11. Are there any groups not involved in (name of community)'s partnership with the CIJE? *If so, who are they and why have they chosen not to become involved?*

Realistically, do you see any chance of them becoming involved at a later time?
12. What has been done to get people involved in Jewish life in (name of community)?
13. How have strategies differed for different types of people, e.g., single adults, families with young children, older persons, etc.?
14. What further efforts could or should be made to get people involved?
15. In what ways do you feel connected to (name of community)'s Jewish community? (Probe: in what ways are you proud of it?)
16. In what ways do you feel alienated from it? (Probe: what makes you feel ashamed of it?)
17. Most educational programs for youth emphasize the importance of traveling to Israel. How do you feel about this emphasis?

Of what importance is Israel in your life? (Probe: level of support, support based on religious vs. national survival, etc.)
18. What are the major challenges facing Jews in (name of community)?
19. What are the major threats to Jews nationally and internationally?
20. In what ways are you prepared to support Jewish education? In what other ways must it be supported?
21. What signs would indicate to you that Jewish education was improving in (name of community)?
21. What would inspire you to become even more involved in Jewish education?
22. Many adults criticize their early Jewish education. Why do you think this is so?
23. Who is not reached by your community's efforts to increase involvement?

24. Who chooses not to become involved? Why?
25. Who shapes policy and funding decisions about Jewish education?
26. Who should be given or take a bigger role in Jewish education in (name of community)?

Nota bene: I have collapsed "preparation" and "mobilization" sections. They seemed to be related. What do you think?

Julie Tammivaara

Roberta Goodman
Claire Rottenberg
Julie Tammivaara

11 October 1992

PROFESSIONAL LIVES OF EDUCATORS

These questions are to be asked of professional educators. The interview is to be preceded by the background interview. This interview consists of eight parts.

Recruitment

This section is designed to determine how personal decisions interact with social constraints to move people into the field of teaching.

My first set of questions will focus on how you came to be a Jewish educator.

1. At what point did you make a definite decision to become a Jewish educator?
(Probe: what were specific circumstances at the time? Get time, place, people, etc.)
2. What were the main attractions teaching held for you?
3. What people were influential in your decision to become an educator?
(Probe: Family, Friends, Other Educators, Others?)
4. Thinking back to when you decided to become an educator... What qualities did you possess that you thought suited you to this work?
5. Would you describe your position here (or, at name of school) please? (Get as much as possible on grade or level, extracurricular duties, etc.)

Socialization.

Socialization here refers to how an occupation organizes the experience of neophyte teachers (or fails to do so).

1. In what ways is your work different from what you expected when you began as an educator?
2. What advice did you receive from people at (name of school) when you began teaching here?

3. What has become more important to you since you have been teaching at (name of school)?
4. Most teachers find that there is a best time of the day or week for really getting something across to students. What do you consider the best circumstances for getting something across to students?
5. How many other educators work with you?
6. How long have each of them held their current position?
7. Imagine you were having a conversation with a prospective educator. How would you describe what you do? (*Probe:* frustrations and benefits of work as well as content.)
8. What would you tell prospective students and parents about your educational program?
9. To what extent do you feel free to do more or less what you think best? (*Probe:* Get at those areas they do not feel free in; what are they? who or what stands in the way?)
10. If you had a gift of ten more hours a week to be devoted to your work, how would you spend it?
11. Since we are talking about time, I wonder if you could give me a rough picture of how you distribute your time during a typical school week?

First, how much time do you spend on school premises? _____

How do you distribute your time between:

- | | | |
|----|---|-------|
| 1. | Actual classroom teaching | _____ |
| 2. | Preparation for class such as lesson planning, setting up equipment, etc. | _____ |
| 3. | Routine paper work and marking papers | _____ |
| 4. | Seeing students individually | _____ |
| 5. | Talking with parents | _____ |
| 6. | Meetings | _____ |
| 7. | Other--specify _____ | _____ |
| | | _____ |
12. How much time, including weekends, do you spend preparing for school at home during the average week? _____

13. Do you spend time on school work other than at school or at home-- such as meetings of professional groups or at classes? If yes, how many?

Rewards

This section deals with the daily tasks of teaching and what meanings the educator attaches to them.

1. Every so often teachers tell me they have had a really good day. What is a good day like for you? What happens?
2. Please recall some occasion when you felt especially proud of something you achieved as a teacher. Please tell me about it.
3. Are there other things you have experienced when have made you feel proud?
4. Most of us have some occasions when we feel ashamed about something we have done. What kinds of things have you regretted doing?
5. What are the main ways you determine you are doing a good job? (Probe: what happens? What are some indicators you are effective?)
6. If you were to ask someone to *privately* help you assess your own work, who would you turn to? (Probe: why this person? What could he/she tell you?)
7. You are one of many Jewish educators in the United States. What do you think attracts these teachers to the work they do?
8. As far as you personally are concerned, what are the major satisfactions you receive in your work as a Jewish educator? (Get as many as possible.)

Of those you have mentioned, which do you feel is *the most important* satisfaction?
9. Have you found a satisfaction in teaching you didn't expect when you began as a teacher? If so, what is it?
10. What salary and/or benefits do you receive?
11. Looking ahead, what career opportunities do you see for yourself?
12. What career opportunities would you like to see made available to you?

13. What opportunities for professional growth (workshops, college courses, conferences, etc.) have you had? Are you taking any classes now?
14. In what areas of your work do you feel powerful? Not so powerful? (*Probe: explain in detail*)
15. How do lay people assist you in your work?
16. How *should* they be assisting you?
17. What "facilities" are important to you in your teaching? What I mean is what "things"--books or equipment or whatever--really make a difference in the kind of job you can do? (*Probe for specifics.*)

Purpose

What hopes and ideals do educators have? What are their perspectives on their colleagues? What makes them proud?

In this section I would like to learn how your hopes for Jewish education and how you think about others in the profession.

1. As you think about your work, what do you see as the main purpose(s) of Jewish education?
2. How would you like to see your students changed or transformed as a result of your teaching?
3. Describe a model 40-year-old Jewish person. (Allow for multiple descriptions.)
4. Thinking back on your own Jewish education, describe a really wonderful teacher you had.
5. Describe a teacher who was not so wonderful.
6. What changes have you effected in the structure of your educational program?
7. In what ways have you been especially successful as a Jewish educator?
8. Describe an ideal fellow educator, i.e., one you would especially enjoy working with. What qualities would this person have?
9. What kind of *knowledge* must a Jewish educator have to be able to do a good job of teaching of the kind you do?

What is *most* important?

10. What must a teacher be able to do--what *skills* must he or she have--to do a good job at the kind of teaching you do?

What is *most* important?
11. Have you ever experienced what might be called a "turning point" or an "epiphany" where you knew you had become a "pro" as a Jewish educator? (If yes, ask educator to describe.)
12. How would you like to be remembered by the students you have taught?
13. If you could choose your students in the coming year, which would you choose and why?
 - a. A group of students whose emotional needs are a challenge to the teacher.
 - b. A group of nice kids from average homes who are respectful and hard-working.
 - c. A group of creative and intellectually demanding students calling for special effort.
 - d. A group of underprivileged children from difficult homes for whom school can be a major opportunity.
 - e. Children of limited ability who need unusual patience and sympathy.

Which would be your second choice? Why?

Discontent.

Those things that make an educator's goals difficult to reach are the focus of this section.

1. What little things irritate you in your work?
2. What changes would help alleviate these irritations?
3. What circumstances would cause you to leave your position?
4. When was the last time you were tempted to leave? (*Probe: What were specific circumstances? What happened?*)
5. What two or three changes would significantly improve your situation?

Sentiments

The educator's preoccupations (aspects of the environment that are heeded), beliefs (theories they use to explain behavior), and preferences in working arrangements are the focus here.

1. When you enter your classroom at the beginning of the day's work, how must it be arranged so you can teach effectively? That is, how do you like it to look?
2. When the students enter the room, can you tell what kind of a day or period it is going to be? If so, what tells you?
3. What kinds of things make it more difficult for you to get your job done? (*Probe: material and emotional states.*)
4. Think about a really good day you had recently. What made it a good day?
5. Think about a particularly difficult student you had to deal with. What was the problem and why did he or she have it?
6. What kinds of decisions do you participate in at your school? (*Probe: specific examples.*)
7. What resource materials are available to you?
8. How is curriculum chosen? Modified?
9. How has status of Jewish educators changed since you became involved either as a student or teacher?

Interpersonal Preferences

The nature of relationships with parents, peers, and supervisors.

1. How many parents, on the average, do you see in a month?
2. For what reasons do you seek to meet with parents?
3. For what reasons do parents seek to meet with you?
4. Would you like to meet with parents more or less often? Why?
5. What, from your point of view as a teacher, makes a "good" parent?
6. Think for a moment about your fellow educators.
 - a. When and where do you interact with them? (*Probe: singly or in groups*)
 - b. How are educators as a group perceived by others?

- c. How do others show they respect (or do not respect) you?
7. Do you ever work together with other teachers on lessons? *If yes, describe how this work is done?*
 8. Do you prefer to work alone or with other teachers?
 9. What, in your opinion, makes someone a good "fellow teacher?"
 10. Some people think that a school should be operated like a well-run business where everyone's responsibility is clearly stated and the lines of authority are sharp. Others think that schools should be organized loosely and that relationships among members of the staff should tend toward equality. Which of these two views is closer to yours? Why?
 11. What do you consider to be the major responsibilities of the school director toward you?
 12. What do you consider your major responsibilities to the school director?
 13. What questions would you ask a school director if you were to seek a position at a new school?

Nota Bene: There are only seven sections in this interview; The eighth one we discussed, change, seems to be incorporated in other sections. Should we pull these out for a separate treatment? Also, leading statements for each section are not completed. Any suggestions? Please feel free to suggest changes.

Julie Tammivaara

SIGNIFICANT POINTS FROM ADAM GAMORAN'S PAPER

ON LESSONS FROM THE NEW FUTURES INITIATIVE FOR THE CIJE

1. MUCH MORE TIME SHOULD HAVE BEEN INVESTED FROM THE BEGINNING IN DEVELOPING COLLABORATIVE RELATIONSHIPS AND COORDINATING EFFORTS, page 5: "...James Van Vleck, chair of the collaborative in Dayton: "As we've sobered up and faced the issues, we have found that getting collaboration between those players is a much more complicated and difficult game than we expected". Part of the difficulty lay in not spending enough time and energy building coalitions and consensus at the outset. Otis Johnson, who leads the Savannah collaborative, is quoted as saying: "If we had used at least the first six months to plan and do a lot of bridge-building and coordination that we had to struggle with through the first year, I think it would have been much smoother."

page 8: Those involved in New Futures believe they should have spent more time building coalitions and establishing strategies before introducing new programs...Institutional change cannot be changed by fiat, but only through a slow process of mutual consultation and increasing commitment.

2. WHAT EACH LEAD COMMUNITY SHOULD BE ABLE TO ANSWER, pages 6-7: "Although New futures provided general guidelines, no particular programs were specified... Each lead community must be able to answer the question, "how should students' and educators' daily lives be different?"

3. IN RESPONSE TO CYNICISM ABOUT POSSIBILITIES OF FIGHTING AGAINST THE TIDE: "Jewish educators would be quite correct to claim that if North American youth fail to remain Jewish, it is largely due to circumstances beyond the educators' control. But this is besides the point. At issue is not external impediments, but how educational and social agencies can respond to changing external circumstances. In New Futures cities, educators have mainly attempted to get students to fit existing institutions. If CIJE communities do the same, their likelihood of failure is equally great. Instead, lead communities must consider changes in their organizational structures and underlying assumptions to meet the needs of a changing Jewish world."

4. THE IMPORTANCE OF BLANCING ENTHUSIASM WITH PLANNING: page 9: If "lead communities" is a twenty-year project, surely it is worth taking a year or more for presentation. Deliberation at the planning stage creates a risk that momentum will be lost, and it may be important to take steps to keep enthusiasm high, but the lesson of New Futures show that enthusiasm must not overtake careful planning."

THE CHALLENGE OF SYSTEMIC REFORM:
LESSONS FROM THE NEW FUTURES INITIATIVE FOR THE CIJE

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THE CHALLENGE OF SYSTEMIC REFORM: LESSONS FROM THE NEW FUTURES INITIATIVE FOR THE CIJE

In 1988, the Annie E. Casey Foundation committed about \$40 million over a five-year period to fund community-wide reforms in four mid-sized cities: Dayton, Ohio; Little Rock, Arkansas; Pittsburgh, Pennsylvania; and Savannah, Georgia.¹ The reforms were aimed at radically improving the life-chances of at-risk youth, and at the core of the agenda were changes in educational systems and in relations between schools and other social service agencies. Despite major investments, not only financial but in time, energy, and good will, from participants as well as the Foundation, the New Futures Initiative has made little headway in improving education.

According to a three-year evaluation:

The programs, policies, and structures implemented as part of New Futures have not begun to stimulate a fundamental restructuring of schools. For the most part, interventions were supplemental, leaving most of the basic activities and practices of schools unaltered. At best, these interventions have yet to produce more than superficial change (Wehlage, Smith, and Lipman, 1991, p. 51).

This is not a matter of failing to allow time for programs to take effect, nor is it the problem that weak outcome indicators prevented recognition of the benefits of innovative programs. Rather, the programs themselves have been weakly conceived and poorly implemented.

There are striking similarities between the action plans of New Futures and the CIJE's lead communities project. Consideration of the struggles of New Futures therefore provides important lessons for the CIJE which may allow us to avoid the pitfalls that New Futures has encountered. In this paper, I will describe the design and implementation of New Futures, and show its similarities to the CIJE's agenda. Next, I will summarize New Futures' successes and frustrations.² Finally, I will explore the implications of the New Futures experience for the CIJE.

The Design of New Futures

Just as the CIJE was born out of dire concern for the fate of American Jewry, the New Futures Initiative emerged in response to a sense of crisis in urban America. Like the CIJE, New Futures is concentrating major assistance in a few locations, and emphasizing community-wide (or systemic) reform, rather than isolated improvements. At the heart of New Futures' organizational plan are community collaboratives: local boards created in each of the New Futures cities which are supposed to build consensus around goals and policies, coordinate the efforts of diverse agencies, and facilitate implementation of innovative programs. These collaboratives began with detailed self-studies which served both as part of their applications to become New Futures cities, and as the groundwork for the agendas they developed subsequently. Each city developed a management information system (MIS) that would gauge the welfare of youth and inform policy decisions. Like the CIJE, the Casey Foundation listed certain areas of reform that each city was required to address, and encouraged additional reforms that fit particular contexts.³

Another similarity between New Futures and the CIJE is the decision to play an active part in the development and implementation of reforms. Unlike the sideline role played by most grant-givers, New Futures provided policy guidelines, advice, and technical assistance. New Futures has a liaison for each city who visits frequently. According to the evaluators, "the Foundation attempted to walk a precarious line between prescribing and shaping New Futures efforts according to its own vision and encouraging local initiative and inventiveness" (Wehlag, Smith, and Lipman, 1991, p. 8).

The New Futures Initiative differed from the CIJE in that it began with clear ideas about what outcomes had to be changed. These included increased student attendance and achievement, better youth employment prospects, and reductions in suspensions, course failures, grade retentions, and teenage pregnancies. New Futures recognized, however, that these were

long-term goals, and they did not expect to see much change in these outcomes during the first few years. The three-year evaluation focused instead on intermediate goals, asking five main questions (Wehlage, Smith, and Lipman, 1991, p. 17):

1. Have the interventions stimulated school-wide changes that fundamentally affect all students' experiences, or have the interventions functioned more as "add-ons"...
2. Have the interventions contributed to...more supportive and positive social relations...throughout the school?
3. Have the interventions led to changes in curriculum, instruction, and assessment...that generate higher levels of student engagement in academics, especially in problem solving and higher order thinking activities?
4. Have the interventions...give(n teachers and principals) more autonomy and responsibility...while also making them more accountable...?
5. Have the interventions brought to the schools additional material or human resources...?

Although Wehlage and his colleagues observed some successes notably the establishment of management information systems, and exciting but isolated innovations in a few schools, by and large the intermediate goals were not met: interventions were supplemental rather than fundamental; social relations remained adversarial; there was virtually no change in curriculum and instruction; and autonomy, responsibility, and community resources evidenced but slight increases.

New Futures' Limited Success

New Futures' greatest achievement thus far may be the "improved capacity to gather data on youths" (Education Week, 9/25/91, p. 12). Prior to New Futures, the cities had little precise information on how the school systems were functioning. Basic data, such as dropout and achievement rates, were not calculated reliably. Establishing clear procedures for gathering information means that the cities will be able to identify key areas of need and keep track of progress. For example, the data pointed to sharp discrepancies between black and white

suspension rates, and this has made suspension policies an important issue. The outcome indicators showed little change over the first three years, but they were not expected to. New Futures participants anticipated that data-gathering will pay off in the future.

The intermediate outcomes, which were expected to show improvement from 1988 to 1991, have been the source of frustration. None of the five areas examined by Wehlage's team showed major improvement. For example, the most extensive structural change was the rearrangement of some Little Rock and Dayton middle schools into clusters of teachers and students. This plan was adopted to personalize the schooling experience for students, and to offer opportunities for collaboration among teachers. Yet no new curricula or instructional approaches resulted from this restructuring, and it has not led to more supportive teacher-student relations.

Observers reported:

(A)t cluster meetings teachers address either administrative details or individual students. When students are discussed, teachers tend to focus on personal problems and attempt to find idiosyncratic solutions to individual needs. They commonly perceive students' problems to be the result of personal character defects or the products of dysfunctional homes. "Problems" are usually seen as "inside" the student and his/her family; prescriptions or plans are designed to "fix" the student. Clusters have not been used as opportunities for collaboration and reflection in developing broad educational strategies that could potentially address institutional sources of student failure (Wehlage, Smith, and Lipman, 1991, p. 22).

The failure to take advantage of possibilities offered by clustering is symptomatic of what the Wehlage team saw as the fundamental reason for lack of progress: the absence of change in the culture of educational institutions in the New Futures cities. Educators continue to see the sources of failure as within the students; their ideas about improvement still refer to students' buckling down and doing the work. The notion that schools might change their practices to meet the needs of a changed student population has yet to permeate the school culture.

Another example of unchanged culture was manifested in strategies for dealing with the suspension problem. As New Futures began, it was not uncommon for a third of the student

body in a junior high school to receive suspensions during a given school year. In some cases, suspended students could not make up work they missed; this led them to fall further behind and increased their likelihood of failure. In response, several schools began programs of in-school suspensions. However, out-of-school suspensions remained common, and in-school suspensions were served in a harsh and punitive atmosphere that contradicted the goal of improving the schools' learning environments.

The newspaper account of New Futures' progress focused on a different source of frustration: the complexity of coordinating efforts among diverse social agencies, schools, and the Foundation. This task turned out to be much more difficult than anticipated. The article quotes James Van Vleck, chair of the collaborative in Dayton: "As we've sobered up and faced the issues, we have found that getting collaboration between those players is a much more complicated and difficult game than we expected" (p. 12). Part of the difficulty lay in not spending enough time and energy building coalitions and consensus at the outset. Otis Johnson, who leads the Savannah collaborative, is quoted as saying: "If we had used at least the first six months to plan and to do a lot of bridge-building and coordination that we had to struggle with through the first year, I think it would have been much smoother" (p. 13).

The push to get started led to an appearance of a top-down project, though that was not the intention. Teachers, principals, and social workers--those who have contact with the youth--were not heavily involved in generating programs. Both the news account and the evaluation report describe little progress in encouraging teachers and principals to develop new programs, and school staff appeared suspicious about whether their supposed empowerment was as real as it was made out to be (see Wehlage, Smith, and Lipman, 1991, p. 31).

Inherent tensions in an outside intervention contributed to these difficulties. The use of policy evaluation has made some participants feel "whip-sawed around" (Education Week, 9/25/91,

p. 15). A Dayton principal explained, "We were always responding to...either the collaborative or the foundation. It was very frustrating for teachers who were not understanding why the changes were occurring" (Education Week, 9/25/91, p. 15). Another tension emerged in the use of technical assistance: While some participants objected to top-down reforms, others complained that staff development efforts have been brief and limited, rather than sustained.

According to the evaluation team, the New Futures projects in the four cities have suffered from the lack of an overall vision of what needs to be changed. How, exactly, should students' and teachers' daily lives be different? There seem to be no answers to this question.

Implications: How Can the CIJE Avoid Similar Frustration?

The New Futures experience offers four critical lessons for the CIJE: (1) the need for a vision about the content of educational and community reforms; (2) the need to modify the culture of schools and other institutions along with their structures, (3) the importance of balancing enthusiasm and momentum with coalition-building and careful thinking about programs; and (4) the need for awareness of inherent tensions in an intervention stimulated in part by external sources.

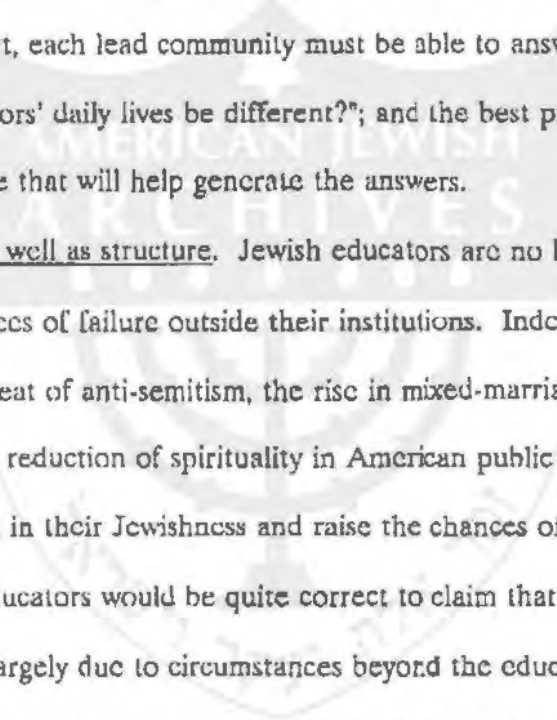
The importance of content. Although New Futures provided general guidelines, no particular programs were specified. This plan may well have been appropriate in light of concerns about top-down reform. Yet the community collaboratives also failed to enact visions of educational restructuring, and most new programs were minor "add-ons" to existing structures. Wehlage and his colleagues concluded that reforms would remain isolated and ineffective without a clear vision of overall educational reform. Such a vision must be informed by current knowledge about education, yet at the same time emerge from participation of "street-level" educators--those who deal directly with youth.

This finding places the CIJE's "best practices" project at the center of its operation. Through a deliberate and wide-ranging planning process, each lead community must develop a broad vision of its desired educational programs and outcomes. Specific programs can then be developed in collaboration with the CIJE, drawing on knowledge generated by the best practices project. In addition to information about "what works," the best practices project can provide access to technical support outside the community and the CIJE. This support must be sustained rather than limited to brief interventions, and it must be desired by local educators rather than foisted from above. In short, each lead community must be able to answer the question, "how should students' and educators' daily lives be different?"; and the best practices project must provide access to knowledge that will help generate the answers.

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Changing culture as well as structure. Jewish educators are no less likely than staff in secular schools to find sources of failure outside their institutions. Indeed, the diminished (though not eradicated) threat of anti-semitism, the rise in mixed-marriage families, disillusion with Israel, and the general reduction of spirituality in American public and private life,⁴ all may lower the interests of youth in their Jewishness and raise the chances of failure for Jewish education. Thus, Jewish educators would be quite correct to claim that if North American youth fail to remain Jewish, it is largely due to circumstances beyond the educators' control. But this is besides the point. At issue is not external impediments, but how educational and social agencies can respond to changing external circumstances. In New Futures cities, educators have mainly attempted to get students to fit existing institutions. If CIJE communities do the same, their likelihood of failure is equally great. Instead, lead communities must consider changes in their organizational structures and underlying assumptions to meet the needs of a changing Jewish world.



How do CIJE plans address this concern? The intention to mobilize support for education, raising awareness of its centrality in all sectors of the community, is an important first step, particularly since it is expected to result in new lay leadership for education and community collaboration. New Futures' experience shows that this tactic is necessary but not sufficient. In New Futures cities, community collaboratives galvanized support and provided the moral authority under which change could take place. Yet little fundamental change occurred. Educators have not experimented much with new curricula, instructional methods, responsibilities or roles, because their basic beliefs about teaching and learning have not changed.

It is possible that the CIJE's strategy of building a profession of Jewish education address this problem. Perhaps unlike the secular educational world, where methods are well-entrenched, professionalization in Jewish education will carry with it an openness to alternatives, encouraging teachers to create and use new knowledge about effective programs. Professionalization may bring out the capacity to experiment with "best practices" and a willingness to adopt them when they appear to work.

Balance enthusiasm with careful planning. Those involved in New Futures believe they should have spent more time building coalitions and establishing strategies before introducing new programs. Douglas W. Nelson, executive director of the Casey Foundation, regrets that more time was not taken for planning. He observed: "We made it more difficult, in the interest of using the urgency of the moment and the excitement of commitment, to include and get ownership at more levels" (Education Week, 9/25/91, p. 13). Again, it is not just the structure that requires change--this can be mandated from above--but the unspoken assumptions and beliefs that guide everyday behavior which require redefinition. Institutional culture cannot be changed by fiat, but only through a slow process of mutual consultation and increasing commitment.

Lead communities also need a long planning period to develop new educational programs that are rich in content and far-reaching in impact. This process requires a thorough self-study, frank appraisal of current problems, discussions of goals with diverse members of the community, and careful consideration of existing knowledge. If "lead communities" is a twenty-year project, surely it is worth taking a year or more for preparation. Deliberation at the planning stage creates a risk that momentum will be lost, and it may be important to take steps to keep enthusiasm high, but the lesson of New Futures show that enthusiasm must not overtake careful planning. The current schedule for the lead communities project (as of January, 1992) appears to have taken account of these concerns.

Awareness of unavoidable tensions. New Futures' experience highlights tensions that are inherent to the process of an outside intervention, and the CIJE must be sensitive so the effects of such tensions can be mitigated. The CIJE must recognize the need for stability after dramatic initial changes take place. The CIJE's evaluation plan must be developed and agreed upon by all parties before the end of the lead communities' planning period. Technical support from the CIJE must be sustained, rather than haphazard. While the CIJE cannot hold back constructive criticism, it must balance criticism with support for honest efforts. Many of these tactics have been used by New Futures, and they may well account for the fact that New Futures is still ongoing and has hopes of eventual success, despite the frustrations of the early years.

Conclusion

The New Futures Initiative, the Casey Foundation's effort to improve the lot of at-risk youth in four American cities, has been limited by supplemental rather than fundamental change, the inability to modify underlying beliefs even where structural changes occur, and by the complexities of coordinating the work of diverse agencies. Although it will be difficult for the CIJE to overcome these challenges, awareness of their likely emergence may help forestall them

or mitigate their consequences. In particular, the CIJE should help lead communities develop their visions of new educational programs; think about cultural as well as structural change; ensure a thorough self-study, wide-ranging participation, and careful planning; and remain sensitive to tensions that are unavoidable when an outside agent is the stimulus of change.

Lo alecha ha-m'lacha ligmor, v'lo ata ben horin l'hibatei mi-menah. Ha-yom katzar v'ha-m'lacha m'rubah, v'ha-poalim atzeylim, v'ha-sahar harbeh. U-va'al ha-bayit dohek --- Pirke Avot.

(It is not your responsibility to finish the task, but neither are you free to shirk it. The day is short and the task is large, the workers are lazy, and the reward is great. And the Master of the House is pressing --- Sayings of the Fathers.)

NOTES AND REFERENCES

1. Lawrence, Massachusetts, was originally included as well, with an additional \$10 million, but it was dropped during the second year after the community failed to reach consensus on how to proceed.
2. This account relies largely on two sources. One is an Education Week news report by Deborah L. Cohen, which appeared on Sept. 25, 1991. The second is an academic paper by the Casey Foundation's evaluation team: Gary G. Wehlage, Gregory Smith, and Pauline Lipman, "Restructuring Urban Schools: The New Futures Experience" (Madison, WI: Center on Organization and Restructuring of Schools, May 1991).
3. The reforms required (or "strongly encouraged") by the Casey Foundation were site-based management, flexibility for teachers, individualized treatment of students, staff development, and community-wide collaboration. This list is longer than the CIJE's, whose required elements are building the educational profession and mobilizing community support.
4. On the decline of spirituality in America, see Robert N. Bellah et. al, Habits of the Heart (Berkeley, CA: University of California Press, 1985).

Vera

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Date: Fri, 13 NOV 92 15:36:50
From: EKJC68@ERCVAX.EDINBURGH.AC.UK
To: annette@hujivms
Subject: anticipated content of first reports -- for discussion
Sender: JANET "EKJC68@UK.AC.EDINBURGH.ERCVAX"
<EKJC68@ERCVAX.EDINBURGH.AC.UK>

CIJE Evaluation Project

ADAM

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Anticipated Content of First Reports
November, 1992

COMMENTS WELCOME



The first reports from the monitoring, evaluation, and feedback project are due at the end of January, 1993. The reports, one for each community, will be based on initial visits to the communities during November-December 1992. Each local CIJE director will receive the report on his/her community, and the field researchers will be available to present relevant portions of the reports orally to appropriate groups within the communities. A summary report will also be prepared for the CIJE staff and board subcommittee on evaluation.

What will the reports contain? The task of the evaluation project during the CIJE's first year is to monitor the process

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becoming a lead community, with attention to emerging visions of Jewish education, and a focus on the "enabling elements" described in A Time to Act: community mobilization, and the professional lives of educators. The reports will serve as "mirrors" to the community, displaying the current state of Jewish education and the ongoing efforts to improve it. The first reports will be primarily descriptive rather than analytic, and we anticipate discussion of the following areas:

Description of the community and its education system

(1) The community as a whole: What is the character of this Jewish community? What do some of its leaders perceive as important strengths and resources upon which to build?

(2) Education system: What is the structure of Jewish education in this community? What institutions are involved, and, roughly, what is the nature of their personnel?

Becoming a lead community

(1) Preparation: What motivated participants to become

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Involved in the lead community proposal? What did/do they hope to gain--for their own communities, and for American Jewry more generally? Who was involved in the proposal-writing process? How, if at all, has participation in the local CIJE effort changed since then? What does the concept of a "lead community" mean to members of this community?

(2) Mobilization: Who is presently involved in the community's CIJE effort? Who is not involved? What role do educators play in the CIJE, and/or what role is envisioned for them? To what extent are diverse groups represented in the local CIJE efforts? What attempts are underway to broaden financial support for Jewish education?

(3) Visions: Who in the community has given thought to goals for Jewish education? What programs are envisioned or newly established? What is the diversity of views about the desired future of Jewish education in this community? To what extent are these views seen as attainable?

Challenges to the community

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This section will focus on issues that emerge as key challenges to the efforts to establish a broad-based planning process for community-wide improvement of Jewish education. For example, the need to develop visions for Jewish education, or to draw educators into the local CIJE effort, might turn out to be important issues. This section is based on the premise that the CIJE lead communities project is more than "just another project;" its goal is fundamental, systemic invigoration of Jewish education in these communities and, ultimately, throughout North America.

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Via: UK.AC.ED.ERCVAX; 11 NOV 92 14:21:54 GMT
Date: Wed, 11 NOV 92 14:21:56
From: EKJC68@ERCVAX.EDINBURGH.AC.UK
To: annette@hujivms
Subject: meeting on the 23/24
Sender: JANET "EKJC68@UK.AC.EDINBURGH.ERCVAX"
<EKJC68@ERCVAX.EDINBURGH.AC.UK>

I'm glad it will work out to send a f.r. to the meeting on the 23/24. I am sure any of them would represent the project well. If one must be recommended I suggest Claire since she has been presenting the project so much lately.

However, let me make one more pitch to send all three field researchers.

First, I made an issue of this a couple of weeks ago so they already think all three of them are going. Second, all three will be visiting all three communities at some times, and it would be good for them to be introduced to the leaders of the other communities. Third, they would just be in the background during the meetings and not speak except to answer questions and to present the project if asked, and then only one of them would present.

P.S. I received a letter from Julie today in which she says they have an appointment to meet with Barry Holtz prior to the meeting on the 23rd-- "an informal get-acquainted session" she calls it. So it looks like they've already set up their trips. That's my fault--I told them they were going a couple of weeks ago.



CENTRE FOR EDUCATIONAL SOCIOLOGY

A Designated Research Centre of the ESRC

Directors: Andrew McPherson and David Raffe

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August 28, 1992

Ms. Annette Hochstein
Mandel Institute of Jerusalem
22a Hatzfira St.
Jerusalem 93012 ISRAEL

*Spk with
Adam on
16/9
Annette*

Dear Annette,

As usual I enjoyed our visit today and found it very helpful for stimulating my thinking about the evaluation project. I enclose a draft of the tentative schedule for field research. Following our discussion, I would add the following items:

- (a) Late October: conference call with evaluation staff (AG, EG, and field researchers) and AH and SF to discuss the probable content of the January reports. This will be preceded by informal sharing of ideas about what might go into the reports within this group and with others e.g. Art, Barry.
- (b) Mid-January: advisory committee (SF, AH, JC, MI) will review a draft of the report to be released at the end of the month. We will get this to you as early in January as possible, and we will need a quick turnaround on your response.

The tentative schedule was prepared to give us a sense of what our workload is and how much we can get done in a year. It is definitely subject to modification to take into account the needs of the lead communities and other contingencies that may arise.

As I explained today, the initial visit is not intended to be a rigorous data-gathering exercise, but is aimed more at orienting ourselves to the communities, introducing ourselves to the local CIJE organizers, finding a place to live for Claire and Julie, etc. It will be a low-key visit. I think your suggestion of asking Shulamith to introduce us to the local CIJE leader(s) will facilitate this approach. It may be useful to arrange a meeting with her first, to work out the guidelines for entry into the lead communities. Alternatively, we may work on this long-distance and ask her to meet with each researcher separately for a short time immediately prior to their first trip to their own communities.

The second set of visits (Nov.-Dec) will be more intensive, consisting primarily of interviews which will address all three of our substantive questions. Because the visit will be only a week long, the number of respondents will be limited, probably including the first and part of the second segments of our "snowball" sample (local CIJE leaders and leading educators).

With regard to the question you raised about what if a respondent says, "I don't know about goals, you tell me," the interviewers will have a variety of probes which may simulate responses despite initial hesitation. More generally, I agree that we need to prepare the field researchers as well as possible so such responses will not take them by surprise. I hope that by posing the question about goals, we will stimulate participants in lead communities to think about aims for

Jewish education, and provoke a dialogue among them. Incidentally, I would not be too dismayed if the federation professionals are unconcerned or are unable to articulate goals for education. After all, that is not their area. I think it is more important that CIJE induce the educators in the community to articulate a (hopefully coherent and as cohesive as possible) vision or visions, and to think about how the vision(s) might be attained. But the visions question cannot be restricted to the educators, but rather reach out to the communal professionals, the lay leaders, congregants, etc. We will be examining not only the visions themselves, but the process each lead community lays out for itself to establish and achieve educational goals.

I also like your suggestion of contacting people outside the local communities, particularly persons at the national training seminaries. There could be two purposes to such discussions: (1) Provide background information for field researchers on the range of possible goals for Jewish education that may or may not be expressed in lead communities; (2) Gather information on the links, if any, between the training institutions (and/or their affiliated movements) and the lead communities. The down side to this plan is that our time is limited and I'm not sure how to work it in. At a minimum, I think it is important that we make time for the field researchers to meet with Barry Holtz.

I'm glad things went well in the States and I'm delighted and excited that the project has truly started. I think you and Seymour should take pride in each major step. We in the evaluation project will try to do our part to keep things moving in the right direction.

As always,



Adam

CC: Ellen Goldring
Roberta Goodman
Claire Rottenberg
Julie Tammivaara

P.S. I have enclosed my receipts for the trip to London. They include:

airfare	189 pounds sterling
taxis	21
underground	5

TOTAL 215 pounds sterling

If you prefer to reimburse me in dollars, this comes to \$430.



A Designated Research Centre of the ESRC

Directors: Andrew McPherson and David Raffie

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TOTAL 215 pounds sterling

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ACCOMMODATE SPECIALS TO
tentative questions:



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September 9, 1992

Dr. Julie Tammivaara
South 4319 Miami
Spokane, WA 99223

Dear Julie,

I was so pleased to receive your letter with the draft of the interview questions. I think the team is making excellent progress. I've taken a few extra days to respond since you've given me a lot to respond to!

I'd like to raise three general issues, and then a few specific points about each section:

GENERAL QUESTIONS

(1) All three lists of questions are termed "Questions for Jewish Educators." Yet questions about vision and about mobilization need to be asked of a broader set of respondents, including professional and lay leaders in communal organizations, parents/congregants, members of JCC's, perhaps unaffiliated Jews, etc. How will you handle these different audiences? Will you develop separate protocols for each category? I'm sure that many of the same questions can be asked of different types of persons, but some questions might be more appropriate for educators than for other respondents. Particularly in the questions about vision, we need to think about varied ways of approaching the subject.

Perhaps we should step back and lay out the possible different categories of interviewees. These might be:

- professional educators (mainly teachers and principals)
- rabbis (who are educators to varying degrees)
- students (would need to limit this: e.g. secondary only?)
- parents of students
- congregants who are not parents
 - especially lay leaders of congregations
- JCC members
- professional leaders of communal organizations (eg, Fed, JCC)
- lay leaders of communal organizations
- persons unaffiliated with congregations and JCC's

I want to raise some questions about this list. First, what have I left out? Second, how are we going to prioritize conducting interviews with persons in these groups? Will we omit some of them? Which ones? Third, how will the interview questions be modified for these groups of respondents?

As a first cut, let me go back to the methods section of my "tentative plan" which I presented in August. I listed three starting points from which we would snowball outward:

- (1) Key actors involved in the l.c. proposal
- (2) Leaders of communal organizations involved in education
- (3) Random samples of lay persons not included in (1) or (2)

If we follow this plan, we would first need interview questions for professional and lay leaders of communal organizations, professional educators and rabbis, and lay leaders of congregations. (Perhaps lay leaders of communal organizations could have the same interview questions as lay leaders of congregations.) This plan gives lower priority to interviewing students.

This discussion leads me to conclude that you will need three versions of the questions about vision, and possibly mobilization:

- (a) questions for educators
- (b) questions for other professionals
- (c) questions for lay persons, including leaders of communal organizations and of congregations, parents, etc.

Time permitting, there could be a fourth version of the questions about vision for students.

How does this sound to you? I'd be happy to hear about alternative approaches. I'm sure there will be a lot of overlap among these versions of the questions--perhaps the main difference would be in the way you introduce the questions.

(2) There are a lot of questions here!! I am concerned about the length of the interviews, particularly for educators, who would presumably be responding to all three sections. How can these questions be prioritized? Here are a couple of alternate ideas:

- (a) Ask only the visions questions in the Nov.-Dec. visits. In the Jan.-Apr. visits, ask the mobilization and professionalism questions of persons interviewed previously, and ask the visions questions of a broader sample. In the May-June visits, ask again about visions and mobilization (to monitor changes), and ask about professionalism from a broader sample.
- (b) From a limited sample, ask about all three subjects in the Nov.-Dec. visits.

(Non-educators would not be asked about professionalism.) Broaden the sample and ask about all three subjects in Jan.-Apr. For the May-June visits, return to key respondents to monitor changes in vision and mobilization.

My concern with plan (b) is that there would be a lot of questions for one round of interviews. Of course, many variations on these ideas are possible. For example, you could follow plan (a) but add mobilization questions numbers 1 - 7 for the Nov.-Dec. interviews. I hope you will discuss these and other plans that you devise and let me know what you intend to do.

(3) Do you have any plans to pilot the questions? I urge you to do so. The easiest thing is to try them out on each other, and that is certainly a good way to start. But I suggest finding some interview subjects outside the lead communities who would be willing to help out by responding to the questions. As you well know, practice interviews of realistic subjects will help prepare you for the kinds of responses you may receive in the I.C.'s. In addition, practicing the interviews will show if I am right to be concerned about the length of the interviews.

SPECIFIC QUESTIONS

Generally I think you've devised some high-quality questions. A few reactions:

Vision questions:

Obviously you need some sort of warm-up here, and as I noted above, the warm-up will likely be different for different categories of respondents. Non-educators will have much less to say about these questions. What sort of probes can we devise to help them along? For example:

What should Jewish education in this community look like in five years? How does that differ from what exists today?

What kind of Jewish education would you like your children or grandchildren to receive? Is that type of education available today? (If not): What changes are needed to bring that about?

Mobilization questions:

Again, some sort of introduction is needed. What is the process referred to in question 1?

What are the points behind questions 8 and 9? (I can make some guesses, but I'd like to hear your views. I'm not criticizing, just wondering.)

I think question #13 is great. Why does it come under mobilization? Does it link up with the visions questions?

What do we mean by "policy and funding decisions" in question #16? We definitely need to know this, but I wonder if we need a more subtle way of asking it.

Professionalization questions:

We've been using "professionalization" and "professionalism" as a shorthand for referring to this topic. Let's not lose sight of the fact that most Jewish educators are not full-time professionals, and many are not making a career of Jewish education. Nor should we take it as given that this is a goal of the reform of Jewish education. So let's use our shorthand, but remember that, more accurately, these questions are about the professional lives of educators, i.e. the conditions under which they work and the efforts they expend. We can take it as a given that one goal is to improve the professional lives of educators--that is a required element of A Time to Act.

Unlike the other sections, these questions are clearly intended only for educators. Questions for non-educators about the professional lives of educators would come under vision.

At the beginning of this section (or elsewhere), we need to establish some basic background information such as how much they teach/administer, what their subjects are if they are teachers, how long they've been Jewish educators, etc.

Generally I think these questions get at the heart of the matter. Someone should review the Los Angeles Jewish Teachers Survey--and any other community teacher survey--to see if there are other ideas.

I hope these responses are helpful, and that you can discuss them in upcoming weekly conference calls as well as in group meetings. I just heard from Ellen that the first "official" team visit may be to Atlanta in late October, so that leaves about five weeks to address these issues and polish the questions. I would appreciate the opportunity to respond at least once more to the next draft of the questions and to any decisions you make regarding which sections to ask of whom at what point in the year. If time gets short, remember that you can reach me by fax.

Thanks much for keeping me up-to-date.

Best,

Adam

cc: Roberta, Claire, Ellen, Annette

20 August 1992

VISION

VISION From Old French *videre*, to see.

To have vision implies the ability to see things as they are, as they can be, and as they should be. A visionary thinks beyond the present; ideas have a shape; persistence is crucial. Vision and visionary can denote both qualities of unusual discernment (positive) and of unrealistic fantasy (negative). Where the line is drawn may depend upon realization; that is, when the vision is realized, its holder is redeemed. To see things as they are is a skill; as they can be is a political one, and as they should be is a moral issue.

1. What is the purpose of Jewish education?
2. Describe changes you have seen in Jewish education over the years.
 - a. What beliefs have been confirmed?
 - b. What beliefs have been challenged?
3. What is your vision of Jewish education? (*Probe* for specifics in organization, process, outcome, clients, etc.)
4. How shared is your vision with others?
5. Who does not share your vision? Why?
6. What is needed to realize your vision?
7. Realistically, what could be achieved in the next five years or so?
8. Who and what are your sources of influence? (*Probe*: reading, talking, workshops, courses, etc.)
9. What are two or three Jewish precepts that have guided you?
10. What are some important precepts that particularly apply to Jewish education or schooling? (*Probe*: give some alternatives.)

Roberta Goodman
Claire Rottenberg
Julie Tammivaara

Questions for Jewish Educators

20 August 1992

MOBILIZATION

n.b. Need to keep in mind who are the mobilizers, who are the mobilized.

1. Who is involved in the process?
2. Who is the "driver?"
3. What has been done to get people involved in Jewish life in your community?
4. What would you like to see done? (Alternative: What should have been done?)
5. How do strategies differ for different categories of people? (For example, families with young children, families with grown children, families with no children, singles, intermarried couples, etc.)
6. In what ways do you feel connected to the Jewish community?
7. When do you (or in what ways do you) feel alienated from the Jewish community? (*Probe:* What makes you proud/ashamed of the community?)
8. What does Israel mean to you? (Get at unconditional versus conditional support issue, religious vs. national issue, etc.)
9. What are the major threats to the survival of the Jews in this country? Worldwide?
10. What constitutes support for Jewish education? (*Probe:* resources, people, attitudes, etc.)
11. What signs would indicate to you things were improving in Jewish education?
12. What would inspire you to become even more involved in Jewish education?
13. Many adults criticize their early Jewish education. Why do you think this is so?

14. Who is not reached by your community's efforts to increase involvement?
15. Who chooses not to become involved? Why?
16. Who shapes policy and funding decisions about Jewish education?

Roberta Goodman
Claire Rottenberg
Julie Tammivaara

Questions for Jewish Educators

20 August 1992

PROFESSIONALIZATION:

1. At what point did you make a definite decision to become an educator?
(Probe: what were specific circumstances at the time?)
2. What were the main attractions the job held for you?
3. What people were influential in your decision to become an educator?
(Probe: Family, Friends, Other Educators, Others?)
4. Thinking back to when you decided to become an educator... What qualities did you possess that you thought suited you to this work?
5. In what ways is your work different from what you expected when you began as an educator?
6. Tell me about your formal schooling.
 - a. Grammar school
 - b. High school
 - c. College
 - d. Non-formal training
7. How long have you held your current position?
8. What positions (and for how long) did you hold before this one?
(Affirm non-paying, non-institutional work.)
9. How many other educators work with you?
10. How long have each of them held their current position?
11. Imagine you were having a conversation with a prospective educator. How would you describe what you do? (Probe: frustrations and benefits of work as well as content.)
12. What would you tell prospective students and parents about your educational program?
13. Think for a moment about your fellow educators.

- a. When and where do you interact with them? (*Probe:* singly or in groups)
 - b. How are educators as a group perceived by others?
 - c. How do others show they respect (or do not respect) you?
14. What salary and/or benefits do you receive?
 15. Looking ahead, what career opportunities do you see for yourself?
 16. What career opportunities would you like to see made available to you?
 17. What opportunities for professional growth (workshops, college courses, conferences, etc.) have you had?
 18. In what areas of your work do you feel powerful? Not so powerful? (*Probe:* explain in detail)
 19. Thinking back on your own Jewish education, describe a really wonderful teacher you had.
 20. Describe a teacher who was not so wonderful.
 21. How do lay people assist you in your work?
 22. How *should* they be assisting you?
 23. As you think about your work, what do you see as the main purpose(s) of Jewish education?
 24. How would you like to see your students changed or transformed as a result of your teaching?
 25. Describe a model 40-year-old Jewish person. (Allow for multiple descriptions.)
 26. What changes have you effected in the structure of your educational program?
 27. What circumstances would cause you to leave your position?
 28. When was the last time you were tempted to leave? (*Probe:* What were specific circumstances? What happened?)
 29. What two or three changes would significantly improve your situation?
 30. What kinds of decisions do you participate in at your school? (*Probe:* specific examples.)
 31. What resource materials are available to you?
 32. How is curriculum chosen? Modified?

33. How has status of Jewish educators changed since you became involved either as a student or teacher?



A Designated Research Centre of the ESRC

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August 28, 1992

Ms. Annette Hochstein
Mandel Institute of Jerusalem
22a Hatzfira St.
Jerusalem 93012 ISRAEL

Dear Annette,

As usual I enjoyed our visit today and found it very helpful for stimulating my thinking about the evaluation project. I enclose a draft of the tentative schedule for field research. Following our discussion, I would add the following items:

(a) Late October: conference call with evaluation staff (AG, EG, and field researchers) and AH and SF to discuss the probable content of the January reports. This will be preceded by informal sharing of ideas about what might go into the reports within this group and with others e.g. Art, Barry.

(b) Mid-January: advisory committee (SF, AH, JC, MI) will review a draft of the report to be released at the end of the month. We will get this to you as early in January as possible, and we will need a quick turnaround on your response.

The tentative schedule was prepared to give us a sense of what our workload is and how much we can get done in a year. It is definitely subject to modification to take into account the needs of the lead communities and other contingencies that may arise.

As I explained today, the initial visit is not intended to be a rigorous data-gathering exercise, but is aimed more at orienting ourselves to the communities, introducing ourselves to the local CIJE organizers, finding a place to live for Claire and Julie, etc. It will be a low-key visit. I think your suggestion of asking Shulamith to introduce us to the local CIJE leader(s) will facilitate this approach. It may be useful to arrange a meeting with her first, to work out the guidelines for entry into the lead communities. Alternatively, we may work on this long-distance and ask her to meet with each researcher separately for a short time immediately prior to their first trip to their own communities.

The second set of visits (Nov.-Dec) will be more intensive, consisting primarily of interviews which will address all three of our substantive questions. Because the visit will be only a week long, the number of respondents will be limited, probably including the first and part of the second segments of our "snowball" sample (local CIJE leaders and leading educators).

With regard to the question you raised about what if a respondent says, "I don't know about goals, you tell me," the interviewers will have a variety of probes which may simulate responses despite initial hesitation. More generally, I agree that we need to prepare the field researchers as well as possible so such responses will not take them by surprise. I hope that by posing the question about goals, we will stimulate participants in lead communities to think about aims for

Jewish education, and provoke a dialogue among them. Incidentally, I would not be too dismayed if the federation professionals are unconcerned or are unable to articulate goals for education. After all, that is not their area. I think it is more important that CIJE induce the educators in the community to articulate a (hopefully coherent and as cohesive as possible) vision or visions, and to think about how the vision(s) might be attained. But the visions question cannot be restricted to the educators, but rather reach out to the communal professionals, the lay leaders, congregants, etc. We will be examining not only the visions themselves, but the process each lead community lays out for itself to establish and achieve educational goals.

I also like your suggestion of contacting people outside the local communities, particularly persons at the national training seminaries. There could be two purposes to such discussions: (1) Provide background information for field researchers on the range of possible goals for Jewish education that may or may not be expressed in lead communities; (2) Gather information on the links, if any, between the training institutions (and/or their affiliated movements) and the lead communities. The down side to this plan is that our time is limited and I'm not sure how to work it in. At a minimum, I think it is important that we make time for the field researchers to meet with Barry Holtz.

I'm glad things went well in the States and I'm delighted and excited that the project has truly started. I think you and Seymour should take pride in each major step. We in the evaluation project will try to do our part to keep things moving in the right direction.

As always,



Adam

cc: Ellen Goldring
Roberta Goodman
Claire Rottenberg
Julie Tammiivaara

P.S. I have enclosed my receipts for the trip to London. They include:

airfare	189 pounds sterling
taxis	21
underground	5

TOTAL 215 pounds sterling

If you prefer to reimburse me in dollars, this comes to \$430.

Via: UK.AC.ED.ERCVAX; 11 SEP 92 12:24:41 BST
Date: Fri, 11 SEP 92 12:23:46
From: EKJC68@ERCVAX.EDINBURGH.AC.UK
To: annette@hujivms
Subject: reports
Sender: JANET "EKJC68@UK.AC.EDINBURGH.ERCVAX"
<EKJC68@ERCVAX.EDINBURGH.AC.UK>

Annette,

In anticipation of introductory meetings in the lead communities,

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The field researchers are asking what they should say about reports. Ellen and I have decided we need to come up with something more definite than we've said so far. This would be part of an informal presentation that the field researchers will make when they are introduced by Shulamith to people in their own l.c.'s. These meetings will stress our collaborative spirit and show that we view them as clients as well as our subjects. It will provide opportunities for questions as well as for l.c. participants to say how monitoring and evaluation can help them, what types of information they would like, etc.

What follows is a draft of what we could say about reporting. I'd welcome any comments you may have.

Field Researcher reports in lead communities:
A Tentative Proposal

The tentative plan of work for field researchers calls for preparing three written reports, to be released in late January, early May, and early July. The first two reports will be primarily descriptive, while the third will be more analytic, and

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Addresses address changes that occur over the course of the year.

The purpose of these reports is to provide feedback to both the national and local CIJEs on each community's progress toward planning and, ultimately, implementing programs that will substantially improve Jewish education and that can serve as a model for the rest of North America. It is not possible to say at this point what we mean by "improve"; indeed part of the field researchers' task will be to discover and articulate each community's visions of improvement. Based on A TIME TO ACT, we anticipate that progress will occur in mobilizing the community--lay and professional--in support of Jewish education, and in enhancing the profession of Jewish education, among other areas.

Written reports will be presented to the Director of the CIJE and to the local Chairs of the CIJE project. For the first two reports, community members will receive only the reports on their own communities, and will make their own decisions on wider distributions. In addition, the field researchers will be available to make oral reports to groups within the lead communities as mutually agreed upon by the field research team



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November 6, 1992

To: Art Rotman
From: Adam Gamoran and Ellen Goldring
CC: Evaluation project advisory committee
Re: Proposed feedback mechanism for CIJE and lead communities

The purpose of this memo is to propose a system for distributing and disseminating the quarterly reports prepared by our field researchers. We offer it now for your approval, with the suggestion that you present it for discussion to members of the lead communities, so they can have some input regarding the form and content of the quarterly reports.

The memo describes the distribution of quarterly reports, with each community receiving its own report. In addition, we mention a summary report. The summary report is intended for the CIJE administration (and, at your discretion, for the board subcommittee on evaluation). It will contain comparative information about the three communities, as well as an overall assessment of the CIJE's progress.

Post-It™ brand fax transmittal memo 7671		# of pages » 2
To ANNETTE LAHSTEIN	From ART ROTMAN	
Co.	Co.	
Dept.	Phone #	
Fax #	Fax #	

Proposed feedback mechanism in lead communities

The field researchers are expected to prepare quarterly reports on their findings in lead communities. During the first year, the reports will document the state of Jewish education in the three communities, with particular reference to visions for change, mobilization of the communities, and the professional lives of educators. (These reports will presumably be complemented by local self-studies addressing participation rates and other quantitative indicators.) Especially in the first quarterly report, the field researchers will document the process of becoming a lead community, and they will monitor this process throughout the year. Each community's report will reflect the particular pace and direction of planning within that community.

Preparation and dissemination

The field researchers, with input from the director and associate director of evaluation and their advisory committee, will produce a first set of reports on the lead communities by the end of January.

The January reports will be delivered to Art Rotman, the Director of the CIJE. He will send each community's report to the respective local project directors. In a cover letter, he will offer to have our field researchers provide one or more oral presentations to professional and/or lay leaders (at the discretion of the local project director) based on the portions of the report that are appropriate for wider dissemination. Each community will receive only its own report.

In addition, the evaluation staff (director, associate director, and field researchers) will prepare a summary report. The summary report will include comparative information about the three communities, and an assessment of CIJE progress to date. This report will be delivered to Art Rotman, who may wish to share it with the CIJE Board subcommittee on evaluation.

Subsequent quarterly reports will be disseminated in the same manner, subject to modification based on our experience in January.

Content of the first report

The first report must document the process of becoming a lead community. It must reveal the critical issues facing the lead communities as they attempt to mobilize and invigorate their systems of Jewish education. Examples of possible issues are:

- mobilization and cooperation among various groups within lead communities, e.g. federation professional and lay leaders
- achieving consensus within communities about what it means to be a "lead community"
- bringing educators into the lead community process
- getting community members to express visions for Jewish education

Proposed feedback mechanism in lead communities

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What will happen to these reports? Who will receive them? How will they be disseminated? What, more specifically, will they contain? I propose the following:

Preparation and dissemination

The field researchers, with input from Adam, Ellen, and the advisory committee, will produce a first set of reports on the lead communities by the end of January.

After review by our advisory committee, the January reports will be delivered to Art Rotman, the Director of the CIJE. He will send each community's report to the respective local project directors. In a cover letter, he will offer to have our field researchers provide one or more oral presentations to professional and/or lay leaders (at the discretion of the local project director) based on the portions of the report that are appropriate for wider dissemination.

Communities will not receive reports on the other communities. However, each report will have a section on experiences in the other communities that are relevant for their own efforts.

Art may also present all three reports to the CIJE board subcommittee for evaluation. Alternatively, he may ask for a summary report based on the three reports.

Subsequent quarterly reports will be disseminated in the same manner, subject to modification based on our experience in January.

Content of the first report

The first report must document the process of becoming a lead community. It must reveal the critical issues facing the CIJE as it attempts to create lead communities in Atlanta, Baltimore, and Milwaukee. These issues may include:

- educating federation lay and professional leaders about the concept of a lead community (so far, community members and CIJE staff do not seem to share the same idea of what a lead community is)
- bringing federation professional and lay leaders together (early indications show important divisions between these groups in the lead communities)
- getting educators involved (where are the educators in the lead community coalitions?)
- getting community members to express visions for Jewish education

August 1, 1992

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

I. CONTENT

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

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

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

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

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

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

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

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

Recent advances in educational theory also emphasize the importance of community-wide, “systemic” reform instead of innovations in isolated programs. Educational change is more likely to succeed, according to this view, when it occurs in a broad, supportive context, and when there is widespread consensus on the importance of the enterprise. Hence, an important issue for the evaluation of lead communities is the breadth and depth of participation in the project. What formal and informal linkages exist among the various agencies of the community? Which agencies participate in the visions of change that have been articulated?

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

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

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

II. METHODS

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

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

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

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

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

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

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

Second Planning Workshop of the CIJE

July 14-18, 1991

Day One 14/7/91

Participants: Barry Holtz, Alan Hoffman, Mark Curvis, Barry Chazan, Ami Bouganim, Isa Aron, Jonathan Woocher, Jacob Ukeles, David Resnick, Daniel Marom, Ze'ev Mankowitz, Seymour Fox, Annette Hochstein, Adam Gamoran, Shulamith Elster, Daniel Laufer, Steve Hoffman (chair)

The purpose of this workshop is to develop working concepts and pre-structured approaches so as to come to working understandings of what to do next. The assembled group is an ad hoc committee of individuals who were asked to join the working group. The results of this workshop will be reported to the Senior Policy Advisors on August 18th, and at the end of August, the entire product will be brought to the Board in New York.

The working paper prepared by Seymour Fox and Annette Hochstein, "Implementing the Recommendations of the Commission for Jewish Education in North America" (Appendix I) is the basis for the initial deliberations of the working group. The lead community will be the focal point of the discussions since all ideas put forward by the CIJE, both conceptual and programmatic come together there. Discussions will then be translated into an action plan and a work plan.

Questions:

- When would the process of choosing lead communities begin?
- By the beginning of 1992, the process will begin, but when each of the steps is to be taken is something we will have to discuss.
- Do all these "good things" happen before or after they are chosen.
- This will be discussed in the small groups.
- How will lead communities be chosen?
- Two possible approaches.
 - a) The buckshot approach --all interested communities would submit their candidacy.
 - b) Approximately 10 communities which would seem natural candidates for lead communities would be asked to submit their candidacy. From this list, some 3 to 5 communities would be selected. If the buckshot approach is taken, it could take years to sift through all the materials.
- What is the definition of "community"? Is it a geographical site or a community of like entities, i.e. day schools, preschools, camps, etc.
- Some voted for geographical locations. Some advocate an alternate approach.
- ~~- Is this still open for debate.~~
- Not final, but appears to be decided in favor of geography.
- A community is more than a sum of its parts.
- What criteria would make a community a likely candidate? Is this what we'll discuss in small groups?
- In small groups, should discuss the entire paper. We'll ask

for specific recommendations from subsequent small groups.

- The purpose of this discussion is to point out problems, weaknesses and omissions in thinking in this paper before presenting it to the Senior Policy Advisors.

Break up of plenary into two working groups

Group I (Shulamit Elster, Mark Gurvis, Barry Chazin, Daniel Marom, Jack Ukeles, Seymour Fox, Jonathan Woocher)

- How should we define a lead community.
- The term community was chosen because it is greater than the sum of its parts. It allows for combinations of formal and informal education. The larger the system, the greater the impact.
- We are now in a state when communities are major planning forces. There is already an effective mechanism called community.
- If we are interested in networking, there will be a price to pay in developing it
- The existence of denominations will probably be our biggest problem.
- Where is networking in the issue of priorities?
- There is an assumption that there are two enabling options community and personnel. These will be expressed in the lead communities but will not be limited to lead communities.
- The problem of the denominations remains. They will probably have their own goals which is why goals was avoided in the commission discussion.

- They will be encouraged to define what they consider to be success.
- Who decides outcomes?
- Each denomination will define this on their own. Each denomination would be encouraged to develop its goals.
- What about communities that are not lead communities. There is something elitist about all of this.
- Choosing one point in the overall picture to push forward with certain specific limited goals allows us to focus energies on that point of entry. This can set off a ripple effect.
- What about the term "site" That appears to be too narrow. The term "locale " is more appropriate.
- The site is where these concepts become real -- move from being theoretical concepts to a reality.
- What is important is to explain the philosophy behind it -- what is the "hidush".
- It Would be important to show how this is new even if the communities were already doing everything well.
- The lead community is a whole concept. That is why replicability is so important. It is a conception as to how to lead to changes in Jewish education.
- A lead community should apply to a particular geographical site where carefully worked out educational concepts will be applied.
- A lead community should refer to the entire community and the qualifier "or a large part of it" should be eliminated.
- The document as a whole appears to favor formal education as

opposed to informal education. A term such as "in-service education" should be replaced by "professional growth".

- The statement "Communities will be presented with a menu of projects" sounds too directive.

- There must be certain elements. without this, it will not play.

- All programmatic elements are optional. There are two essentials -- personnel and community.

- Perhaps there should be a "preferred list" -- a certain imprimatur.

- What must be agreed to at the outset is what will happen in course. The "menu" is important at a later stage, but not as an initial prerequisite.

- Will not be able to relate to a menu until after they have related to this. There is a danger in coming in at the outset. Want to mobilize community support. Want to engage communities in a process.

- There must be certain elements to guarantee scope and quality. Communities must write down how they will be able to guarantee success. Programmatic elements must be agreed upon in advance.

- The community, coming together with the CIJE will agree to a certain standard going in. Must buy into certain standards.

- The time sequence is not good. The menu of projects is okay, but later must sort it out. What commitments must be made up front.

- We'll have to tell them how much it will cost to be a lead

community. Who knows?

- Cost will be a factor in feasibility.
- The cost of CIJE will be perceived by the community as overhead.
- Perhaps there should be a commitment to look at the overall picture of Jewish education.
- The word that is missing is partnership.
- We've not clarified what should be the role of CIJE
- It might be a good idea to put in short statement at the beginning. But every idea must be restated several times.
- What do we mean by scope?
- Scope guarantees the minimum conception of comprehensiveness.
- When we talk about "high standards", we are talking about depth.
- Who sets the standards. There are some places where the denominations determine it.-
- How much impact will we really have. The results will be limited and expensive
- Must differentiate between assessment and evaluation. Also, there is the element of accountability. What kinds of outcomes are possible?
- Coleman agreed to serve on Gamoran's project of how to evaluate. He recognizes the importance of innovation
- Innovation and experimentation lead to higher risk. Must do a probability and risk matrix. High pay off can mean high risk. How many high risks can one take?

- Danger of emphasizing only experimental. There are some good things going on. There is also "building upon strengths"
- Must be careful in our use of terms. The gerunds on page 10 tend to be stale and repetitive.
- What is the role of the CIJE in all this
- The lead community represents a unique partnership between the CIJE and the local community.
- The CIJE will do what others do but in more organized fashion. There will be money available, consultants, and ongoing staff to assist in implementation.
- CIJE is a bridge to co-ordinated, collaborative resources.
- CIJE must catalyze national institutions to work together.
- Expectations must be reasonable. Accountability to funders is an issue.
- There is a distinction between outcomes and goals. Must develop indicators that are more proximate. Communities can specify what outcomes they expect. Goals are more long term and will vary among different institutions within a community.
- What does continuity mean. Can we or can we not evaluate continuity.
- Educators don't want to deal-with this.
- What is supposed to happen as a result of Jewish education?
- Continuity stands independent of intermarriage.
- Intermarriage must be brought up to the denominations as a way to thrash it out. Must build strategies to deal with it.
- Intermarriage cannot be a litmus test on Jewish education.

- Must have intermarriage on the agenda. Will intermarriage be an indicator or not. Must be discussed and thrashed out.
 - This is one of the jobs of the CIJE -- to bring all the players together.
 - What do you do when you don't agree on goals but want to measure success.
 - Must agree on a certain list of indicators. Narrow the range of difference. Will agree on least important goals, then on what can agree upon.
 - Every plan in every community must address the issue of Jewish continuity and identity.
 - Quality does not always come into the question of continuity.
 - Cannot take continuity and intermarriage together.
 - Must clarify goals and outcomes. Goals are long term "pious hopes". Outcomes - Communities must determine this. Can't compromise on outcomes. Indicators must be developed. In short terms, indicators are linked to outcomes.
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 - Turn to 10 communities that are naturals.
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- What are the other prerequisites?
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- Might give the lead community a list of things they might consider and they would come up with other ideas.
- Why is this a good idea?
- We must be prepared to say, we are not prepared to accept you if you are not interested in dealing with areas we consider important.
- We've already identified two main issues.
- There is a question from the other side. How can we guarantee diversity?
- This goes back to the issue of local autonomy.
- The menu guarantees that some fundamental items are included.
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- What if they want inservice for day care personnel first, or what if they want to work with only 30% of the personnel?
- Will we say there must be a minimum level of involvement?
- Are there certain criteria for quality to see what is acceptable and what not?
- The real problem is the ownership issue. Must strike a balance through process of negotiating.
- Won't find one best practice in service training, there will be different models.
- What in service experiences will be made available to the community which they might replicate?
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- Community will decide which resources it wants to invest in.
- This won't work. Different schools have different needs. Couldn't force each school to come up with some inservice plan.
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- Must build funding provisions into the plan. The assumption is that there are resources to make such a plan possible.
- Will you be able to get money for this. Inservice training isn't that exciting.

- Not asking for inservice training. Asking for revolution in Jewish education.
- There must be two different lists, list for CIJE and a suggested programmatic list for the lead community.
- Lead communities can come in with a statement of what they think are most needed in the community, -think about what's wrong and what they might do.
- Does CIJE also have a menu
- Yes. What is decided is best practices.
- There are some issues that are so important that they cannot be overlooked.
- Are we talking about a listing or a fleshed out description.
- This is open for negotiation.
- We must know that a significant number of what we consider essential would be covered.
- When applying for grants, they specify what they're most interested in.
- Need not have a menu for communities but there must be one for CIJE. This is not secret, but must be clear to them.
- The CIJE approaches the community with a limited list. The CIJE has series of programmatic areas. The CIJE staff focuses the local community on these items.

Reports to Plenary:

The lead community is seen as a laboratory in which a centralized planning entity that would take the lead in planning. Two dimensions characterize the lead community. a) lay

leadership and b) in-service training.

Selection of projects:

There are three possibilities in selecting menu.

Community must choose 5 projects out of a prepared list.

Must totally decide for themselves

Question: What happens if come up with elements not approved by CIJE?

Consensus of group: There would be a list of 10 programmatic areas with brief descriptions of each. These would be presented in a way to allow for flexibility. There would be no mandated specific program. There must be a balancing of directedness with empowerment -- dictation neither by CIJE nor by local community. Must be sense of partnership or it won't work.

Lead communities and large communities.

How would links be formed between development of lead communities and major centers like NY and LA?

Actually, two separate questions.

1. How is translation made from one city to another?

2. How can laboratory results be applied to large community?

Approaches:

1. Write off NY and LA. Lead communities simply not applicable. Lead communities are no panacea to all Jewish educational needs.

2. Draw boundaries within large communities, i.e. Orange County or Long Island and create lead communities within these

boundaries.

3. Think in terms of two rounds of lead communities. Round one with more smaller communities. Tackle NY and LA in round two.

4. Develop specific programs i.e. pre school program -- which could then be implemented in large cities.

When will CIJE be ready to start diffusing?

How to deal with other communities who want to know what is happening?

Politically, how to deal with the rest of the Jewish population not included in lead communities?

Standards of Quality and Scope

Scope -- a) the minimum amount of activity that must be undertaken for a lead community to have sufficient impact. Must determine, what is that minimal amount.

b) the whole educational universe in the community. Will have to offer some tentative hypotheses in considering scope.

c) cannot define minimum now -- what must determine is the range of activities the community wants to address.

Selection of Lead Community:

Perhaps representatives from communities could attend Seminar in which essential elements of lead communities spelled out. Set guidelines for preparation of requests.

Must determine what criteria are necessary at each stage

before moving on to next stage of process. Certain questions are inappropriate to answer at first stage.



Second Planning Workshop of the CIJE

July 14-18, 1991

Day One 14/7/91

Participants: Barry Holtz, Alan Hoffman, Mark Curvis, Barry Chazan, Ami Bouganim, Isa Aron, Jonathan Woocher, Jacob Ukeles, David Resnick, Daniel Marom, Ze'ev Mankowitz, Seymour Fox, Annette Hochstein, Adam Gamoran, Shulamith Elster, Daniel Laufer, Steve Hoffman (chair)

The purpose of this workshop is to develop working concepts and pre-structured approaches so as to come to working understandings of what to do next. The assembled group is an ad hoc committee of individuals who were asked to join the working group. The results of this workshop will be reported to the Senior Policy Advisors on August 18th, and at the end of August, the entire product will be brought to the Board in New York.

The working paper prepared by Seymour Fox and Annette Hochstein, "Implementing the Recommendations of the Commission for Jewish Education in North America" (Appendix I) is the basis for the initial deliberations of the working group. The lead community will be the focal point of the discussions since all ideas put forward by the CIJE, both conceptual and programmatic come together there. Discussions will then be translated into an action plan and a work plan.

Questions:

- When would the process of choosing lead communities begin?
- By the beginning of 1992, the process will begin, but when each of the steps is to be taken is something we will have to discuss.
- Do all these "good things" happen before or after they are chosen.
- This will be discussed in the small groups.
- How will lead communities be chosen?
- Two possible approaches.
 - a) The buckshot approach --all interested communities would submit their candidacy.
 - b) Approximately 10 communities which would seem natural candidates for lead communities would be asked to be submit their candidacy. From this list, some 3 to 5 communities would be selected. If the buckshot approach is taken, it could take years to sift through all the materials.
- What is the definition of "community"? Is it a geographical site or a community of like entities, i.e. day schools, preschools, camps, etc.
- Some voted for geographical locations. Some advocate an alternate approach.
- ~~Is this still open for debate.~~
- Not final, but appears to be decided in favor of geography.
- A community is more than a sum of its parts.
- What criteria would make a community a likely candidate? Is this what we'll discuss in small groups?
- In small groups, should discuss the entire paper. We'll ask

for specific recommendations from subsequent small groups.

- The purpose of this discussion is to point out problems, weaknesses and omissions in thinking in this paper before presenting it to the Senior Policy Advisors.

Break up of plenary into two working groups

Group 1 (Shulamit Elster, Mark Curvis, Barry Chazin, Daniel Marom, Jack Ukeles, Seymour Fox, Jonathan Woocher)

- How should we define a lead community.

- The term community was chosen because it is greater than the sum of its parts. It allows for combinations of formal and informal education. The larger the system, the greater the impact.

- We are now in a state when communities are major planning forces. There is already an effective mechanism called community.

- If we are interested in networking, there will be a price to pay in developing it

- The existence of denominations will probably be our biggest problem.

- Where is networking in the issue of priorities?

- There is an assumption that there are two enabling options --- community and personnel. These will be expressed in the lead communities but will not be limited to lead communities.

- The problem of the denominations remains. They will probably have their own goals which is why goals was avoided in the commission discussion.

- They will be encouraged to define what they consider to be success.
- Who decides outcomes?
- Each denomination will define this on their own. Each denomination would be encouraged to develop its goals.
- What about communities that are not lead communities. There is something elitist about all of this.
- Choosing one point in the overall picture to push forward with certain specific limited goals allows us to focus energies on that point of entry. This can set off a ripple effect.
- What about the term "site" That appears to be too narrow. The term "locale " is more appropriate.
- The site is where these concepts become real -- move from being theoretical concepts to a reality.
- What is important is to explain the philosophy behind it -- what is the "hidush".
- It Would be important to show how this is new even if the communities were already doing everything well.
- The lead community is a whole concept. That is why replicability is so important. It is a conception as to how to
- ~~lead to changes in Jewish education.~~
- A lead community should apply to a particular geographical site where carefully worked out educational concepts will be applied.
- A lead community should refer to the entire community and the qualifier "or a large part of it" should be eliminated.
- The document as a whole appears to favor formal education as

opposed to informal education. A term such as "in-service education" should be replaced by "professional growth".

- The statement "Communities will be presented with a menu of projects" sounds too directive.

- There must be certain elements. without this, it will not play.

- All programmatic elements are optional. There are two essentials -- personnel and community.

- Perhaps there should be a "preferred list" -- a certain imprimatur.

- What must be agreed to at the outset is what will happen in course. The "menu" is important at a later stage, but not as an initial prerequisite.

- Will not be able to relate to a menu until after they have related to this. There is a danger in coming in at the outset. Want to mobilize community support. Want to engage communities in a process.

- There must be certain elements to guarantee scope and quality. Communities must write down how they will be able to guarantee success. Programmatic elements must be agreed upon in advance.

- The community, coming together with the CIJE will agree to a certain standard going in. Must buy into certain standards.

- The time sequence is not good. The menu of projects is okay, but later must sort it out. What commitments must be made up front.

- We'll have to tell them how much it will cost to be a lead

community. Who knows?

- Cost will be a factor in feasibility.
- The cost of CIJE will be perceived by the community as overhead.
- Perhaps there should be a commitment to look at the overall picture of Jewish education.
- The word that is missing is partnership.
- We've not clarified what should be the role of CIJE
- It might be a good idea to put in short statement at the beginning. But every idea must be restated several times.
- What do we mean by scope?
- Scope guarantees the minimum conception of comprehensiveness.
- When we talk about "high standards", we are talking about depth.
- Who sets the standards. There are some places where the denominations determine it.-
- How much impact will we really have. The results will be limited and expensive
- Must differentiate between assessment and evaluation. Also, there is the element of accountability. What kinds of outcomes are possible?
- Coleman agreed to serve on Gamoran's project of how to evaluate He recognizes the importance of innovation
- Innovation and experimentation lead to higher risk. Must do a probability and risk matrix. High pay off can mean high risk. How many high risks can one take?

- Danger of emphasizing only experimental. There are some good things going on. There is also "building upon strengths"
- Must be careful in our use of terms. The gerunds on page 10 tend to be stale and repetitive.
- What is the role of the CIJE in all this
- The lead community represents a unique partnership between the CIJE and the local community.
- The CIJE will do what others do but in more organized fashion. There will be money available, consultants, and ongoing staff to assist in implementation.
- CIJE is a bridge to co-ordinated, collaborative resources.
- CIJE must catalyze national institutions to work together.
- Expectations must be reasonable. Accountability to funders is an issue.
- There is a distinction between outcomes and goals. Must develop indicators that are more proximate. Communities can specify what outcomes they expect. Goals are more long term and will vary among different institutions within a community.
- What does continuity mean. Can we or can we not evaluate continuity.
- ~~Educators don't want to deal with this.~~
- What is supposed to happen as a result of Jewish education?
- Continuity stands independent of intermarriage.
- Intermarriage must be brought up to the denominations as a way to thrash it out. Must build strategies to deal with it.
- Intermarriage cannot be a litmus test on Jewish education.

- Must have intermarriage on the agenda. Will intermarriage be an indicator or not. Must be discussed and thrashed out.
 - This is one of the jobs of the CIJE -- to bring all the players together.
 - What do you do when you don't agree on goals but want to measure success.
 - Must agree on a certain list of indicators. Narrow the range of difference. Will agree on least important goals, then on what can agree upon.
 - Every plan in every community must address the issue of Jewish continuity and identity.
 - Quality does not always come into the question of continuity.
 - Cannot take continuity and intermarriage together.
 - Must clarify goals and outcomes. Goals are long term "pious hopes". Outcomes - Communities must determine this. Can't compromise on outcomes. Indicators must be developed. In short terms, indicators are linked to outcomes.
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before moving on to next stage of process. Certain questions are inappropriate to answer at first stage.



Day Two 15/7/91

The group divided into two working groups dealing with Best Practices and Recruitment and Selection of Lead Communities.

Best Practices Group: Isa Aron, Adam Gamoran, Seymour Fox, Daniel Marom, Shulamit Elster, David Resnick, Barry Holtz (chair)

The discussion was based on the working paper "Best Practice Version 2" by Barry Holtz. (Appendix II)

- There are two aspects to best practices, a psychological one and a programmatic one. Psychologically, it's good for communities to know that there is such a thing as a good supplementary school.

- How is the problem of "translation" from community to community to be dealt with?

- What are we recommending about translation. Is it possible? When is it possible? How do we make this for real?

- Is this an academic project?

- How do we go about the process of determining Best Practice?.

- Perhaps should not be looking for best schools but rather, best examples: i.e., best in-service training program, best pre school, best Hebrew teaching program, etc.

- When does each element take place?

- It's not a 5 year program but a 20 year program.

- There better be immediate payoffs of the lay leaders will exit.

- How should programmatic research be launched? How do we launch it? What do we offer when they begin? How do we begin? Must we

rank things according to priorities?

- Each programmatic option entails many subareas. i.e.

Supplementary schools include Hebrew, curriculum, staff development, post bar mitzvah programs, etc.

- What do we offer the lead communities when they begin.. -

Perhaps a better term than "best practices" would be "what works".

- Need a rolladex of programs. Rolladex of programs, human resources, methodology. What's to be done the first year, second year, etc.

- The human resources need not be educators. Can be just smart people who know how to look at issues.

- How do we help a lead community today? in 20 years? Must determine what should be the major studies undertaken in each area.

- "Best practice is more than a translation. It is not a blue print but rather an environment for creative development. This creative process cannot take place without knowledge of best practices.

- How can one trust the judges? There is a lack of consensus on what is good.

- To know how to run a good school, must do more than run a good school. Must know what constitutes a good school.

- Can be research based: What works in Jewish education. What aspects make a difference. Or, outcome based: Identification of practices. But must know what to test.

- Must also deal with "what is not best practice" -- a discussion of failures as well as success.

The people involved in this project probably have enough contacts in the field so that they would be able to identify the good schools, but the following issues arose.

- Best practices is more than a translation. Not a blue print but an environment. Cannot be creative without knowledge of best practices.

- What is "high standards"?

- everything that we do is informed.

- Is Best practices an internal or an external document.

- Best practices is a discipline, not only a way of going forward.

- How could we accept the reliability of informants?

- Quality control should be seen as a developing concept. Must figure out why something is good. would be working from rough to less rough to least rough.

- To learn how to run a good school, can't just visit a school. Must know what constitutes a good school.

- If there were a rolladex of "best practices", everyone would want to see it. Could lead to series of problems.

- Would we need scientific verification.

- What would be the inventory items to be examined.

- Timing: What to do first year, second year etc.

- What are the projects to be considered.

- Hebrew, Curriculum (process & context), family education,

governance, how does it fit in with synagogues, staff development, post bar mitzvah would certainly be included.

- Must draw up national diffusion network all linked to developing indices. Include criteria of why cited. "I'm available to come to your school and you can come to my school.

- Danger of getting immature, self satisfied schools whereas mature school realizes its shortcomings.

-Three tiers of best practice:

1) national level; local level; research People should be hired to do think pieces even before translation and research.

- Problems: People who are excellent in the field but cannot open selves to methods other than their own.

People who are excellent but cannot convey to others what they are doing.

Researchers who can give several different approaches -- laymen who want definitive answers.

- Why we don't have a Sarah Lightfoot. Must free up academics to be Jewish Lightfoots. Sources

a) people who are in field of Jewish studies though not educators

b) Jews from field of general education and social sciences --

c) set up an American "Jerusalem Fellows"

- Institutions would never agree to it. They look to their own needs and would not free up researchers.

- Don't like the name "best practices". could be good practices or what works.

- Should think in terms of "in search of best practices". It is a process.

BEST PRACTICES PROJECTS

NEXT STEPS

AMERICAN JEWISH ARCHIVES

I Collection

- human resources (practitioners, experts in field, researchers to guide/evaluate best practices)
- program resources or institutional resources
 - a. list program elements for enabling options (personnel, recruitment, training etc.)
 - b. prioritize programmatic options
 - c. create a process for validating these options
 - d. unpack each of the high priority options (solicit, analyze, select)
 - e. recruit and solicit program exemplars
 - f. undertake preliminary analyses of submissions in (e)
 - g. disseminate (?)
 - h. feedback loop - quality control

11. Service to Lead Community

- a. In each programmatic area, a co-ordinator is identified who does 1, d, e, and f (above). The co-ordinator is the

first contact for the lead community in this area.

-- b.--has resources to service the community

III Research

- a. Start thinking about research in relationship to the programmatic issues.
- b. Create and develop a programmatic research agenda
- c. Study program options for the purpose of evaluation and quality controls and translation to lead communities. Two groups: One group dealing with Best Practices. Second group dealing with Recruitment.

*ALL THE ABOVE MUST BE FIT INTO A TIME LINE

Unsolved Issues:

- 1) dissemination -- when, how
- 2) role of organizations, institutions, individual experts, researchers
- 3) relationship between best practice & lead community
- 4) need methodological researchers to track this year by year.

Plenary Discussion on Best Practices:

-
- Problem with "best" What we are looking for is very good.
 - Timing element: is this an effective procedure. Several different time lines - one long term -- 20 years. One, shorter term -- what happens in L.C.'s Lead community is only part of what CIJE doing.

- Perhaps should think in terms of setting up National Study for Best Practices -- similar to what happening in Michigan State.
 - Several ways we could approach problem. Direct - step by step, or cyclical - iterative. As spelled out, would take months to do each step. No need to look at whole final range -- can get group of experts in field together and would be able to arrive at good consensus.
 - There will be general consensus on projects that would be undertaken : Supplementary schools, Day schools, early childhood, JCC, camps, Israel experience.
 - CIJE could develop roster of co-ordinators, fellows of CIJE. Could turn to JESNA etc. Not a service organization, but a catalyst that serves role of broker-facilitator.
 - Networks exist -- don't need new networks. Learn how to use existing systems and their consultative agencies.
 - Currently many institutions doing best practices but haphazard and uneven. Must be refined.
 - Must do best practices because Commissioners asked for it. Must have informed decisions systematically addressed.
 - First cut is to go to all informants and see what exists. Develop rolladex. Stage one should begin with major enabling options -- professional growth.
- Recommendation: Barry should redo paper on best practices according to findings of deliberating groups. Small group will be drafted by Shulamit Elster to discuss further discussion

Group -II --- Working to Establish a Lead Community

Annette Hochstein, Jonathan Woocher, Jacob Ukeles, Steven Hoffman, Mark Gurvis, Alan Hoffman:

Working to Establish a Lead Community

Application and Selection

AMERICAN JEWISH
ARCHIVES
NEXT STEPS

A. Two round screening process is proposed

a. Round one will include a public request for proposal.

Communities will have 6 weeks to send in 2-3 page long applications. These will be processed rapidly and a list of 10 plus 10 communities selected for round two.

b. A more detailed application process for the 10-20 leading candidates. The process would involve a day-long joint seminar, a more extensive application form and site visits.

Criteria for Round 1 Application:

1. City Size (to be based on CJF criteria)

a. Intermediate (at least 15,000)

b. Large Intermediate

c. Large (below 1/2 million)

2. Commitment

The president of the community's Federation would submit a statement of commitment indicating how the following elements fit into his community:

- a. Evidence and capacity to pull together all elements of the community
- b. evidence of planning process, initiatives and progress in Jewish education within the past 5 years
- c. Evidence of a serious commitment of lay leadership and potential to recruit strong community leaders to engage in the lead community process
- D. A survey of what potential sources for funding could become available for the lead community process.
- e. Commitment to involve all stakeholders in the community in the lead community process
- f. Agreement with the importance of creating an environment conducive to innovation and experimentation in Jewish education.
- g. Commitment to developing personnel
- h. A statement explaining why his community should be a lead community. What it has to offer etc.
- i. Include a sample of letters indicating support by various stakeholders and leaders.

Selection Process

1. First round screening by CIJE staff to reach top 10 and next 10 candidate communities.
2. Send list of 10 to Senior Policy Advisors for comments
3. Convene a teleconference of a committee of Board members including:
 - a. Charles Bronfman
 - b. Mark Lainer

- c. Gerald Cohen
- d. Esther Leah Ritz
- e. Matthew Maryles

Time Line

1. RFP - early September
2. Applications in by October 15
3. Decision (including CIJE Board) by mid November
4. Seminar for 10 communities - early December to review concept and process Each community will send one professional and one lay leader.
5. Second round applications in by late January
6. Decision by March 1, 1991 (latest)

Deliberation on the Selection of a Lead Community

- What is length of time until decide on projects in lead community. There is a time lag. How long will it take to get off the ground. Perhaps should be phased -- personnel issues first and then on to projects.

- What does CIJE bring to communities?

- a. research component
- b. supportive consultation role
- c. ongoing meetings about what outside resources

needed/available

- d. identified contracted person to work with community
- e. specialists in project areas (i.e. Israel experience, preschool) to be shared among communities

- How do national institutions fit in here. Important role for Senior Policy Advisors. -- to see how national groups, denominations could play.
 - Foundations should be involved from beginning.
 - Is 6 weeks enough time for round II. Perhaps we are rushing
 - When exactly does a community create its conceptual plan. - There must be a dialogue between CIJE and local community.
 - Staggering process. Will this allow for more or fewer communities?
 - What about promising community that does not necessarily meet all criteria now?
 - There are two approaches to lead community.
 - 1) Centralized, develop prototype, much guidance from outside.
 - 2) Decentralized -- experiments in large numbers of places.
- Systems for evaluations. Former would mean very limited number because very labor intensive. Discussions seem to indicate that we've opted for former whereas previous discussions tended toward the latter.
- Left out organizational and management element. How much will this cost CIJE?

Day Three 16/7/91

After an extended discussion on Best Practices (recorded in Day Two) The group divided into two working groups to discuss the question of Personnel. One group dealt with Recruitment and Training. The second group dealt with other areas of professional development.

Professional Development -- Everything except Recruitment and Training: Participants Jonathan Woocher, Steve Hoffman, Mark Gurvis, Adam Gamoran, David Resnick

There are four major elements to be dealt with: Compensation, career path, status (how profession is seen) and Education as a profession.

- There are two different sets of issues to be dealt with. -- those involving the quality of life for teachers, i.e. compensation and career path, and those dealing with the professionalization of the career, i.e. certification, peer review.

- What organizational mechanisms could be used to improve the profession of education?

- Must deal with issue of full time vs. Part time teachers:
- This is an area of debate. Some say that having part time teachers is actually beneficial. Others say that unless one sees full fledged professionalism as a goal, will debilitate the field from the outset.

-Perhaps Jewish Education could be like medicine: professionals and paraprofessionals. Not realistic to believe could function with only professionals -- also, perhaps not desirable. - The question should be, how to shrink ill-prepared non-professionals out.

- Or, could ask how possible to raise the level of avocationalists to part time professionals?

- Could look at Cleveland model of community teachers. Managed to raise salaries of full time teachers to \$28-29,000 per annum.

- Problems remain:

1) not able to attract best at what can pay

2) difficult to co-ordinate among schools

3) different ideological streams lead to difficulty in coordinating

4) Many teachers are there for short time

5) don't pay enough to encourage people to relocate

- Must hold out the possibility of advancement and the possibility of a full fledged career. Must point to different areas of advancement such as principal, lead teacher, specialist.

- Impossible to conceive of a situation where some classes would not be taught by college students, homemakers, retirees, etc.

- Some of these groups could be teachers.

- Is the time ripe to raise issue of status, accreditation.

- For early childhood, this is very important.

- Can this be done without raising issues of compensation, peer review.

- National Board of Licensing provides scaffolding - credit

system -- a way to climb up. If a community was serious about upgrading its system, would have some framework to go by.

- What strategy should the CIJE? Should it have a strategy:

- As important as compensation are the issues of pension and health benefits.

- The difficulty with pensions is that supplementary teachers don't have enough hours. (Mutual of America was prepared to set up national model - 2% teacher, 2% school, 2% community- but was not followed up.)

- Health Benefits: Not realistic for part time teachers.

Insurance could cost from \$3000 to \$7000 per year.

- CIJE should encourage participation in CAJE and then evaluate its effectiveness. Look at communities who have sent people to measure effectiveness.-- also examine effectiveness of participation in JEA, ECA, NATE).

- CIJE might contribute to networking -- buttress networks.

Could construct a media resource network.

- CAJE is all inclusive. There is no organization for only teachers to help teachers with their specific problems.

- Could help develop a national publication of quality -- Modest grants of 10-15,000 might enable publication of several journals.

- CIJE could establish an objective of minimum standards of compensation. i.e. equal to local school standards. Every l.c. would be equivalent to public school salaries.

- Can this be advocated in the absence of same standards as public school teachers.

- As public schools raise their salaries, this could cut into the

teachers who might teach in Jewish education.

- Could speak to a local community and say there is a national standard. If there is no impetus, how will we ever move to improvement?

-How to raise the status of teachers. Perhaps attach name of donor to the status award. Provide recognition in status places.

- As of now, the status setters usually don't identify themselves with Jewish education.

-Must deal with issues of empowerment:

- a) autonomy without support not meaningful
- b) with autonomy comes accountability
- c) problem is don't get enough supervision.

- What about the question of professional growth in informal education, i.e., a careers in Jewish camping.

In denominational camps there is a career ladder.

- Must recognize that CIJE can't do everything. They must focus on formal schools. However, there is an intersection of several groups dealing in Jewish areas. Perhaps could help link up people in Jewish areas, i.e. Youth, camps, Israel experience.

NEXT STEPS

CIJE must develop an operating philosophy which looks into the issue and examine profession building.

2. Establish working group on compensation

a) is there a need for and how to go about establishing standards for full time teachers

b) Should there be a standard for avocational personnel.

c) Benefits dayschool/full time supplemental

(should there be a pension plan for supplemental teacher, if only for status reasons.)

3. Status/Networking:

- a. Develop a professional association
- b. Encourage associations to share values and practices.
- c. Encourage publications (could also assist in dissemination)
- d. Encourage CIJE to promote association with national organizations and assess to which this leads to improvement
- e. Work to making national organizations more effective
- f. Examine feasibility of "community teachers" - Cleveland model. Test how it works when teachers used (1) in institutes of different denominations (2) in day school + supplementary schools (3) day school + J.C.C.

4. Experiments in Restructuring Positions

a. In the lead communities, these elements could be built in from the beginning. It is a matter of marketing and tradition. In lead communities, there should be lead teachers -- equal to or better paid than public school teachers.

b. Transition from avocational to professional. Are there any processes? Who should be encouraged? How does the training take place for these people.

c. Very few teachers come to Israel. (Too costly and must use summers to supplement wages. This could be fringe benefit.

Consensus: Need a task force on professional development area.

Recruitment and Training:

Jacob Ukeles, Daniel Marom, Isa Aron, Shulamit Elster, Annette Hochstein, Seymour Fox, Barry Holtz, Alan Hoffman, Daniel Laufer:

Discussion based on paper presented by Jacob Ukeles:

(Appendix III)

"Proposal for Developing a National Strategic Plan
for Training of Jewish Educators"

- This paper is a strategic plan to help CIJE, for both formal and informal education
- The time span envisioned is 3-5 years
- There are 4 objectives
 - 1) assessment of resources and needs
 - 2) the plan itself -- an image of future training system
 - 3) the 3-5 year implementation plan
 - 4) the beginning of developing a database
- Necessary to develop a consistent broad system for recruitment
- Many people in the field resist the notion that training is a problem
- Must see how the pieces fit together; recruitment, training & salaries
- CIJE is a client. Ultimately must introduce institutions into the process
- The 3 major training institutions must be brought in right away
- There are 7-9 institutions working in higher Jewish Education. All should be included
- no one is currently dealing with in service - pre service. How do we deal with this

- There is a set of needs and a set of resources. The most significant gaps are qualitative, not quantitative.
- How does one draw a boundary around the informal field. i.e. Is camping a part of Jewish education. There is Ramah, but there is also a Jewish camp, Camp Podunk which does not pretend to be a Jewish educational camp.
- The situation is more complex. Camp Podunk doesn't define itself as Jewish. The JCC does.
- Is Jewish educational personnel everyone who goes into the Jewish Communal Service?
- Is there a defined role for national institutions? What about the local institutions?
- What should be the appropriate level of detail in a national plan since we expect each institution to have its own plan?
- The national institutions are not the only ones doing in service training. There are other places as well. How can we get a handle on these?
- National vs. local is not a useful distinction. There must be both
- There should also be a regional system for training, something which does not exist now?
- Why couldn't we have a national college of Jewish education that gives accreditation?
- Need some guidance on how to bring Israel into all of this.
- For many people, the Israel experience draws them to the field and/or retains them. Also leads to greater effectiveness in the field.

- some programs set in Israel are organized and directed from abroad.
- This paper is all structure and no content. Why didn't it start from the other end, i.e. the soul searching done by the plays who identify their needs and resources?
- Who is this document for?
- The CIJE
- Why should the CIJE develop a national plan rather than seeding initiatives by others.
- Can do both -- bottoms up and tops down
- Is there a way that best practices could feed into this strategic plan.
- Training is a component which might be an entry into the whole issue.

The plenary discussion on Training

Professional development must be more than training. Must also be experiential. Maybe we don't need a national plan. Perhaps different organizations can develop plans but need both a bottoms up and a top down approach. What are needed are:

1) objectivity: must get beyond denominational interests and stakes

2) New roles for existing institutions

3) might look at issue from a different aspect. i.e. regional development. In some areas, virtually nothing exists.

- Training and professional development by themselves will not do the job.

- There is a clear expectation to build on work previously done.
- The question is : What is the scope of assessment needed at this stage. Thus far, there has been no systematic quantitative analysis of the needs in Jewish education today.
- How much do we have to quantify before we have to start doing something
- When making choices, and when have huge needs and few resources, do we need more planning or less planning. Answer: more planning.
- We know almost nothing about what inservice programs are available. Very little on pre-service.
- Must map who is doing what and where are the gaps. What are the specific service gaps that must be filled.
- Perhaps when get information on 10 communities can extrapolate needs from studies already done.
- Perhaps should dredge up bits and pieces on needs assessment and maybe could get something.
- If what emerges is just a plan to tell CIJE where to put its resources, would do better with more specific areas, i.e. geographical needs
- Why should institutions accept this plan? Before CIJE launches a program like this, it should sit down first and talk to players and institutions about this and talk it out.
- Institutions might not be objective.
- This is different from lead communities and research. People in institutions do have ability to assume distance. Before undertaking such a project, should talk to institutions.

- There could be other ways to go about doing this.
- How does CIJE see its role here?
- CIJE sees self as catalyst which will turn to other institutions for collecting data to allow for planning. - Whom to turn to.
- Essential to look to institutions and denominations before undertaking such a project.
- Is it wise to develop a strategic plan. Might be too massive. Doesn't involve actors sufficiently. Might be too ambitious and too ambiguous to carry out in early stages.
- Also, not focused enough to be useful. Points 2,3,+6 would be part of the self study for lead communities. They you'll see what they need. Do it on a small scale first.
- Should be a continuum between pre service and in service. Must get more info on inservice and must find the connection between pre service and in service.
- As the head of CIJE, how can you give away money with no plan.
- Could begin with 4 institutions. Can we get other people to speak to them?
- Fundraisers want "objective" group to say where funds should be sent.
- National institutions must feed into lead communities. Need to encourage specialization in areas. Need someone to undertake training in pre school.
- When to go comprehensive and when to go partial.
- Are there legitimate national issues.
- There are national issues. Perhaps a national training

institute should deal with incentives to go regional. Don't know what relative roles of institutions should be.

- We do know the key issues now. How do we address all of them.

- Would like CIJE to support and stimulate linked regional efforts about these issues. Or the presidents of Hebrew colleges.

- Will have a series of guiding documents. Take it, break it down, involve individuals.

- There could be multiple centers of activity and their efforts could be validated by CIJE.

- This issue is not adversarial. Should mediate between what we know, what we need to know, and the decision makers.

- Master Plan for North America vs. the notion that CIJE must lay out its strategy.

- Need to reformulate document. What is needed is not a master plan, but development of strategies for what CIJE must do. Should mention current efforts undertaken to make less adversarial.

- Major issue -- do not take a comprehensive look. What we want is reflective blueprint.

- Must show sensitivity to agencies. Should not trust the whole area of professional growth to teachers colleges.

- Must have a person to liaison with institutions.

Day Four, 17/7/91

Plenary meeting

The Commission decided to make research a high priority. Currently, there is a lack of reliable data and lack of evaluation. Need to enlarge the capability of dealing with these issues.

Current concept of lead community has a component of evaluation and feed back built in.

*three major research projects must be undertaken and interfaced on a timeline. These are (1) Best Practices (2)

Monitoring/Evaluation and (3) Research Capability. Shulamit Elster will co-ordinate the undertaking of these projects.

Isa Aron's paper "Setting a Research Agenda for Jewish Education" (Appendix III) was the basis for the discussion. Overall

question: What strategies can the CIJE use to encourage and support the development of research which is of greater quantity and higher quality.

- It must be stated at the outset that there are very few researchers
- one of the purposes must be to create the structure for a permanent capability for ongoing research.
- Should be no advocacy for specific types of research
- Is this a plan or a research paper. If this is a plan must state the product being advocated.
- Policy makers should be included at an earlier stage to determine the agenda of needed research.

- Paper does not reflect what Commission asked for. What was asked for is a research agenda for 10 years to be organized by CIJE.
- How do we build a basic research capability. Should we create new schools or use existing ones.
- Perhaps, take on people right out of school and subsidize them for a period of years.
- The paper that we need is , what is the state of the field and what is inadequate. Then bring together people in field and deal with how to build up capability.
- How to build capability is related to which questions you want answered.
- Structure = capability. Must create a situation to bring these about.
- Skipped step to set up mechanisms for ongoing research -- after items listed are covered. This is what the Commission needs.
- Underanalyzed issues of form--what it means as a strategy. How have other emergent fields built up their research capabilities.
- Order of questions: What research must take place? What structures must we build to take place.
- Could go out to world of educational research in general and co-opt them. Would have to explore if this is feasible, and who is going to do the job.
- There are not enough options. Must develop a series of options and explicit criteria to assess them. Come out with the pros and cons. What are the tradeoffs when choosing one and not the

other?

- Steps to go through: collect everyone's ideas, brainstorm, come out with alternatives. Then move to alternative options.

Must look at

- a. feasibility
- b. effectiveness
- c. time criteria
- d. cost

- CIJE has an agenda. This should be injected into the paper. - Best practices would be incorporated into agenda.
- Might be special research methods that don't exist in general education
- Must map in what have and what need. There is some evaluation material, i.e. New York B.J.E. test.

NEXT STEPS

- 1) Get list of candidates for Advisory Board from people here. (The Board should number 9-11 individuals).
- 2) Get a list from people here of resources (personnel, bibliography etc.) for research options
- 3) Rewrite paper incorporating some of ideas, suggestions from group.
- 4) Prepare an informed list of options to present to Advisory committee
- 5) Use these as basis for brainstorming session with advisory board to help determine options for achieving goal of more and better research faster.

6) Cluster options. Examine set of assumptions behind each option. Explore each cluster in light of feasibility, cost, time, and effectiveness.

6) Reconvene Advisory committee at which Isa (researcher) will give her conclusions. Ask Advisory Board for their evaluation of her findings.

7) Present final form to Shulamit and Steve to present to CIJE

*THREE RESEARCH PROJECTS THAT MUST BE INTERFACED ON A TIME LINE ARE:

- 1) Best Practices
- 2) Monitoring/Evaluation
- 3) Research Capability

These research projects should be co-ordinated by Shulamit Elster.

- An underlying assumption of our discussions is that educators in general education will be interested in Jewish education.

Must check this out.

- Cannot go into Advisory Board for brainstorming. Must have a more focused paper.

II The Monitoring and Evaluation of the Feed Back Process.

The basis of this discussion is Adam Gamoran's Paper "Thoughts on a research Agenda in the Lead Community" (Appendix IV)

A Better Title would be "The Monitoring and Evaluation of the Feed Back Process"

Two types of evaluation Formative evaluation for purpose of ongoing guidance of processes and summative evaluation for the purpose of making decisions as to whether to continue or to halt the process:

- Outcome measures in general education (such as standardized tests) generally do not measure what want to measure
- When there is research within a given site. There are stated goals and operative goals. The operative goals are unexpected results of measures taken. Perhaps should not state goals before going to site. Can start monitoring L.C. before stating goals. Needed: development of outcome indicators while feeding in operative goals.
- There must be a field researcher in lead communities to monitor the process does the lead community goes through in changing the nature of Jewish Education
- Researchers must be open to the possibility of failure as well as success. Most major efforts succeed in only a small part.
- An important question is who learns a lot and who learns a little. Difficult to measure in general education. Would be possible in Jewish education. There are tremendous differences. What is it about Jewish Education's setting that enables people to gain a lot? Must be put off because don't have outcome measures.
- Must examine institutions within the context of community. A network of associations between aspects of community can be dealt with in lead community.

- Need research methodology for difficult situations, when there are more variables than cases.

What would a project like this look like?

- Fieldwork component: 1/2 field researcher in each lead community trained in qualitative research. Could be an anthropologist or evaluation expert.

In one community, a full time lead researcher. Would carry out training program for how to do field work in this context.

- All researchers would come together at quarterly meetings
- The lead researcher would mediate between people and CIJE
- Might need flexibility. In larger community, might need one full time or two part time.

Tasks:

- 1) See to collection of all descriptive quantitative information. (head counts). Much of this would come from self studies
- 2) Monitor process of innovation & change. After 9 months each field worker would produce a report. Only for formative evaluation and guidance.

Year II Data recollected. Monitoring. Interviews continue.

Hire reflective practitioners. Write reflective analyses of

one's own practice. Field worker is the co-ordinator (professor - student relationship) After 21 months, field worker writes second report. Formative & summative reports. Decisions will be made on basis of these.

- Start work on what are outcomes of Jewish education - cognitive, effective, participatory both communal and individual.

Very complex process.

- Should commission a thought piece on what the aims of Jewish education should be. If you were to evaluate outcomes of Jewish education, what would you look at. The paper would be presented to CIJE. CIJE would take it to major institutions and individuals in Jewish education. Would encourage them to respond.

- Would go back to author - extension & elaboration of paper to analyze reactions of organizations.

- Summarize and analyze reactions. From this, a systematic list would be generated. Taken to research advisory committee. Headed by J. Coleman. The following questions would be asked:

1) What is your reaction to this list?

2) Give us advice for developing instruments to measure these achievement goals. Causal analysis. Would take several years. Operative goals would be fed into outcomes.

- What we have here is really a management/research project. It must include monitoring, evaluation, feedback. Need a systematic procedure to collect data. What is the planned outcome and what is the actual result. Need iterative approach and outcome indicators for each stage.

- What kinds of outcomes are we talking about? In addition to individual and communal, they would be different in different projects.

- Researchers can talk about possibility of failure, but there is also accountability to funders.

- One outcome could be a baseline of data and personnel
- If Cleveland could do a profile of all its personnel and a plan on how to improve them, it could then be sent to CIJE as a model of how to approach the problem.
- Must deal with alternate concepts of the educated Jew.
- Must get denominations to undertake the study of desirable issues.
- Players and institutions must indicate what they want to do. Must know this.
- Essential question to be discussed with lay leaders and heads of communities. What is meant by continuity.
- We should have a full time researcher in each community to deal with each of these issues?
- The cost would be prohibitive.
- There will be different priorities in different communities. It will have to be customized and individualized according to each community.
- Don't write off achievements. There are other perspectives of outcomes -- increased participation of parents and others in community. Push for the community perspective.
- Evaluation can be a very sensitive area. How will the CIJE handle this. Must deal with multiple stakeholders in evaluation. Make sure project is designed with evaluation mechanisms built in up front.
- Regarding intermarriage and continuity - there is a danger of CIJE getting involved. Some questions are better not addressed.

- Do we need an assessment of non lead communities, a control group.
- Impossible to disentangle lead communities from projects taking place.
- How will we know if lead community is functioning like a lead community. Is it learning from its consultants. Lay out mechanisms for how each project works.
- Enlist satellite researchers. i.e. from local universities or from other local areas. Search out who is available.
- Outcome must be sensitive to unanticipated outcomes and tacit outcomes. There could be collateral learning.
- Need a model of what we are looking for. Because there are diversity, this could be complex. Could prepare papers on outcomes and expectations about what we want to achieve.
- What does one leave behind in a community when it is all over?
- How is this translated to other communities. Need documentation of this process.
- Should it be the task of the field researcher or of a separate researcher?
- Teachers within community should be trained to keep a log of what they are doing -- teach them to be reflective practitioners.

The discussion on fostering leadership development in Jewish education was based on a paper "Enhancing Jewish Education Through Community Development" by Mark Gurvis and Jonathan Woocher (Appendix V)

-The essential question is how do we work with lay leadership?

Leadership must be looked at many levels.

1) what are the criteria by which we judge effective leadership

2) What is the best structure for the governance of Jewish education?

3) Intra-communal linking. Is there a way of constructing overarching linkages to insure that the different leaders are talking to each other.?

4) Can we establish lay-professional leadership partnerships?

5) How do we train lay leaders in Jewish education?

6) How do we develop tran-local leadership.

Possible approaches:

1) Make leaders feel that they are productively engaged in the community

2) Mentoring: Match up "stars" with up and coming leadership.

3) Develop training programs to help people know their role.

4) Tap adult leaders.

5) Reach funders -- facilitate the development of a continental network beyond local boundaries.

- Leaders must have followers. Also need supportive publics

- Financing. Where does it come from and where should it go?

- Structure. How does a community organize itself for Jewish education.

- How to make leaders feel the meaningfulness of the work they do?
- How to link up locals and cosmopolitans and interest both groups?
- Relationship between lay leadership and professional leadership often adversarial. How to overcome this?
- There must be a lobby for Jewish education.
- Perhaps issue of governance should be taken by JESNA. There would be a national dimension and a lead community dimension.
- Need for leadership, structure, finance and governance. At what point do we translate each one of these into a strategy.
- There will be a unique set of circumstances in each community.
- If CIJE is kept at a high level, it will be the best guarantee to keep things going.
- Should we place p.r. on our agenda?
- Leadership is attracted for status reasons, not via p.r.
- There is a need to build a constituency. Must be part of the plan of every lead community. Structure and governance should be left out at the beginning or made optional. Can't attract good leadership to a poor structure. Politically, tampering with existing structures could be the kiss of death.
- Can turn leaders into reflective practitioners.
- Turn to Stanley Horowitz and Carmi Schwartz and ask them for assistance in dealing with the issue.

DAY FIVE 18/7/91

Which elements should be required and which optional.

-What will we come and ask of a lead community. What will they have to undertake?

-Can there be a lead community that doesn't deal with supplemental schools and Israel?

-Does the CIJE offer a menu of projects. If we do offer a required and an optional menu, what do these have to contain\//

-Should we introduce the element of the contract? If we don't enforce these elements, then the whole idea could dissipate. Must keep in mind. When come to make decisions of what should and what should not be. Must lay out criteria.

-Why go through this again. The commission report lists 26 programmatic areas. These will be whittled down to 10. The lead community will choose their areas. Why are we doing this?

-If we set up priorities of programmatic, we will unravel a distinction laid out in Commission Report.

-Different communities have different champions backing different projects. We can't decide for them here.

-Could we choose a lead community that does not deal with supplementary schools?

-By the time you get to the contract, will already have gone through two rounds of reports. Inconceivable that community would get to that point without having named areas like supplementary schools and Israel.

-Did Cleveland deal with supplementary schools?

-Most of the areas dealt with by Cleveland do relate to supplementary schools

-Are we comfortable scopewise to deal with communities not covering areas like camps and JCC?

-What stage are we talking about, preliminary or when writing contract? No community that did not include these will make it to final stage

-If we want to raise this issue when CIJE reviews initial application, would imply that we have a "secret list". Will never get to this question when writing contract. Will get there at a much earlier stage. Cannot come to community later and say, in addition to enabling options, must also do the following.

-If community chooses family education, CIJE could say, you could do this via JCC and summer camps.

-What criteria could CIJE use to say this. By locking into institutions, could cut out possible creativity.

-CIJE is an ongoing presence. Question is, "What will get the most improvement for the additional investment?" Communities will reach different decisions. This is part of the dialogue.

Cannot preempt planning process

-Someone will have to make a judgement call among the 10 communities. What will be the criteria?

-We still don't know what we want for a lead community. Have to think about cost, what will be the needs, etc.

-CIJE interviewers should ask if they feel the scope of the

proposal is sufficient

-will use practical wisdom, judgement. bottoms up process. The difference between a CIJE endeavor and a non-CIJE endeavor is that CIJE will determine for itself what is the content and scope, and quality of endeavor beneath which, there cannot be a lead community.

-enabling options are powerful and with content, but they can only be translated through programmatic means.

-scope means that must be working with a significant part of the problems as recognized by the community; quality - must make monitoring/feedback part of the process; content - best practices.

Enabling Options: Personnel

-Must be comprehensive, including recruitment, training, profession building, and retention. Personnel must be linked to the community. There must be simultaneous application of all elements. Must be treated continentally and in lead community. If national institutions doing work in these areas, should be introduced to the lead communities.

Best practices must guide all elements of the program. Short range and longer range planning. Learn from innovation, experimentation.

Must be a feeder system on continental level and on local level.

What are good feeder systems.

-Should have a data base of all the possibilities for recruitment.

-Must recruitment be a national issue? Can it be a local issue?

-Inservice training will require getting national institutions in.

-CIJE doesn't have to make plans for developing feeder programs. They're already out there.

Training. Usually consists of courses and stipends. There are also smaller, more experiential training programs on smaller scope. Could be very effective.

-Best practices often programmatic. Emphasis of Best Practices on enabling options might have to be reassessed. Go to the programmatic areas first.

-CIJE much of what we're stressing is on enabling options.

-Should do a profile of every educator. Decide how many to deal with How many will get mentorship? How many will be chosen? Will be a grid. 1) Profile of teacher: 2) What teacher is doing? Where to go.

-Can a profile be developed?

-Could turn to principals to get profiles of teachers

-No way to deal with enabling options without programmatic options.

-CIJE can't emphasize everything all the time. -Will be called on to deliver on a lot of fronts. At the beginning, can say that CIJE can share some wisdom with community in all areas, but CIJE specially equipped to give most wisdom in particular programmatic areas.

-Distinction between best practice and very good ideas (not

tested). Must distinguish between them. Function of the lead community is to do the testing.

Enabling Options.

- For recruitment, there will probably be local and national plans. When we come to a community, must be able to tell them what there is.
- Have different kinds of teachers, lead, professional, avocational etc. Recruitment program must be geared to critical needs according to particular places.
- When engage in partnership between national agency and local community, must recognize that there are people in the local community who know the needs of their community. Must be sensitive to their knowledge.
- CIJE could have its own checklist specifying different types of needs of a community and different types of professionals.
- When we come to a lead community, what do we want them to recruit for. There are short term and long term needs.
- Recruitment refers to recruitment of new personnel from different sources for differentiated needs.
- The whole area of personnel has been widely discussed in North America. CIJE's role can be to point out to communities where their needs might be. They can accept it or reject it.
- Are we expecting every lead community to develop a personnel plan?
- Yes. We do need an explication of the expectations and a plan of what is needed and what the components are. Need set of

criteria to see if it is a good plan.

-What would Senior Policy Advisors look at -- papers? concepts on lead communities? Do we have to commission another group to deal with personnel in a lead community?

-Time to start drafting first paper to send to lead communities. Then draft a second piece. Then draft papers for first meeting. In course of drawing up these documents will learn what we have left to figure out.

-Cannot presume that all principals etc. have a good understanding of their professional needs.

-Prepare outline of what might want to use in the developing of personnel needs. One item could be, consider that teachers are one part of what might be needed.

-There has already been work done on a plan for personnel.

-We are not thinking only of institutions being served by recruitment. Need a feeder system, college students, homemakers, retirees, career change people, general educators, rabbis. could get an infusion of new people

-Must think not only of institutions but also of clients.

-How far should we go into detail?

-We should ask somebody to write the paper on personnel

-Must have a lot to offer lead communities on first approach or will miss the opportunity.

-What we need is neither paper nor plan. CIJE in a position to take the knowledge that the lead community has and complete it. Will only know that when meet with lead community. Even if

sophisticated, they will be in need of assistance in building plans. They will turn to CIJE after self study and gain specific help in how to structure their own plans. CIJE will provide its models. It's a process. Draw up a template.

-Hard to separate recruitment, training, professional growth and retention

-Initially, must be separated. Best practices options is an emergency problem for enabling options.

-Even if we have no recruitment plan, must require the community to develop a recruitment plan.

-First task in drawing up Best practices

identify best practices in recruitment, training, professional growth and retention

Take areas of community and find best practices in each of these areas

Begin to write up proposals for recruiting lead communities

-- first round, second round and contract in order to identify gaps.

-To do best practices, must finish the mapping of what we have and then agree on categories

~~-Must look at other ways of looking at problem. A parallel process must take place on Israel experience program.~~

-Have put too much on best practices. Must be guided by decision of priorities. What task must be done next

-On the time line sent to communities, there is no element of content. If this were available, how would this fit in.

-People running CIJE must put this together -- personnel, community and Israel. There must be a best practices element and must have something to offer them



- In order to deal with personnel, what must be done next?
- Need for two elements a) a plan b) a study Must co-opt teams that are already doing these things and weave in.
- If CIJE is to succeed, must have right teams and keep them on track. Must decide what management process will be. Must bring in institutions while doing this.
- Could be proactive -- play a brokerage role in trying to get institutions to encourage working on paper. CIJE could give seed money
- Orchestra model Sometimes all march together, sometimes quartets, sometimes sections.
- Why just one institution. Try to get 3 institutions to come up with a plan. Planning grant and then implementation grant.
- 3 kinds of interconnection
 - national training + lead community

national training + best practices

National training + other elements (recruitment, etc)

There should be a national strategy in each of these areas.

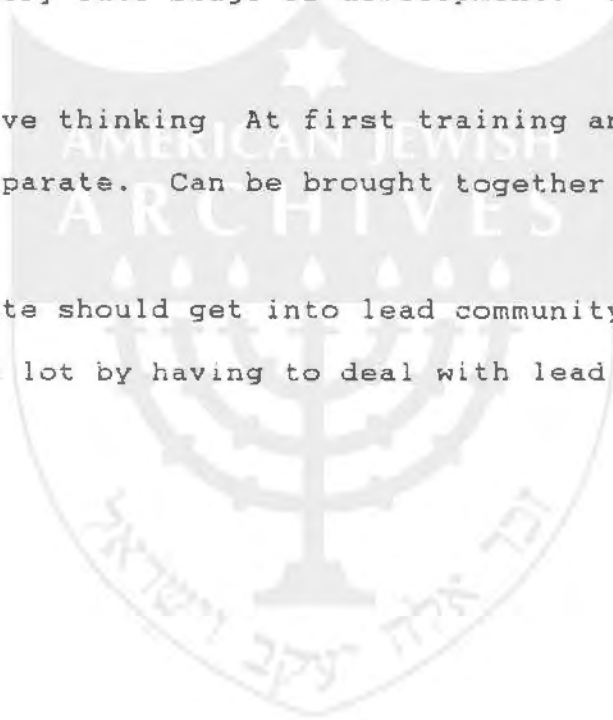
National plan for recruitment and national plan for training.

Somebody at CIJE must examine how all these go together.

-Synthesis is a very late stage of development. Training
separate

Should be iterative thinking. At first training and recruitment
should be kept separate. Can be brought together in second or
third round.

-Training Institute should get into lead community immediately.
They will learn a lot by having to deal with lead community.



Second Planning Workshop of the CIJE

July 14-18, 1991

Jerusalem

Participants: Barry Holtz, Alan Hoffmann, Mark Gurvis, Barry Chazan, Ami Bouganim, Isa Aron, Jonathan Woocher, Jacob Ukeles, David Resnick, Daniel Marom, Ze'ev Mankowitz, Seymour Fox, Annette Hochstein, Adam Gamoran, Shulamith Elster, Daniel Laufer, Steve Hoffman, Michael Inbar

Introduction:

The purpose of this workshop was to develop working concepts and approaches which would guide the CIJE in the next steps to be taken in the development of lead communities. The working group was an ad hoc committee of academics, policy planners, Jewish community professionals, and educators. The results of this workshop will be reported to the Senior Policy Advisors on August 18th, and at the end of August, the entire product will be brought to the Board in New York.

The working paper prepared by Seymour Fox and Annette Hochstein, "Implementing the Recommendations of the Commission for Jewish Education in North America" (Appendix 1) was the basis for the initial deliberations. The lead community was the focal point of the discussions since all ideas put forward by the CIJE, both conceptual and programmatic come together there.

The Lead Community Concept

A lead community is understood to be a geographical entity wherein a rational process of selecting those elements which are most likely to bring about significant changes in Jewish education is operates. It is a locale in which carefully worked out educational concepts move from theory to reality. The lead community will encompass formal and informal education, and combinations of both.

Two dimensions which characterize every lead community are the mobilization and active participation of the lay leadership and the development of a detailed plan for professional growth. These are referred to as "enabling options" which are the sine qua non for every lead community. Lead communities will also select "programmatic options" according to their particular, individual needs. The lead community will enter into a contractual agreement with the CIJE which would specify the responsibilities of each of the partners to the agreement.

Denominational groups, local and national educational institutions and organizational bodies will be encouraged, from the outset, to be participants in this enterprise. While innovation and experimentation are essential elements, it is appreciated that they entail risk. Therefore, a probability and risk matrix must be designed which will assist each community in its choice of programs. At the same time, there should be an appreciation of the good things that are already happening in the community and a balance between experimentation and "building upon strengths" must be achieved.

Eligible Communities

Large cities, such as Los Angeles and New York, though containing approximately one half of the entire Jewish population would not be suitable as lead communities. However, areas of these communities, such as Orange County or Queens might be possible choices. Nevertheless, findings in the lead communities, such as programs in in-service training, curriculum planning, etc. could be useful to these large cities as well as other communities which were not selected as lead communities.

The "Menu of Options"

A comprehensive discussion took place concerning the issue of programmatic options to be selected by the lead community. Among the questions asked were:

Is there a minimum number of options a lead community must commit itself to?

At what point in the selection process must the lead community make its commitment to particular programmatic options?

To what extent should the CIJE try to influence the selection of particular options by the community?

It was the consensus of the group that a sense of partnership must exist between the CIJE and the local community in order for the lead community to work. Therefore, the CIJE would draw up a list of 10 programmatic options with brief descriptions of each of those areas which it considered to be most important. These would be presented in such a way as to allow for flexibility and in consideration of the individual needs of the particular community. There would be no mandated specific program, but rather a balancing of directedness with empowerment with dictation neither by the CIJE nor by the local community.

Scope and High Standards

- * Scope is taken to mean the minimum amount of action that must be undertaken by the lead community in order to bring about significant change.
- * Enough of a critical mass must be involved in order to have a real influence on the community.
- * High Standards refers to the depth of the programs undertaken. Monitoring and ongoing evaluation will be built into all programs in order to guarantee standards.
- * All procedures undertaken are informed by expert advice

Outcomes:

There is a difference between outcomes and goals. Goals are "pious hopes" which can only be evaluated in the long term. Indicators must be developed to measure both short term and long term outcomes. The consideration of outcomes will be the topic of one of the major research areas undertaken by the CIJE.

The Role of the CIJE

- * provide a menu of programmatic options which it considers to be of the highest priority
- * undertake ongoing consultation with the lead community
- * serve as a database for human and programmatic resources
- * bridge between the local community and national institutions and organizations and bring resources of these institutions to the lead communities.
- * catalyze national institutions to work together.
- * serve as a broker facilitator to put communities in touch with outside experts and institutions.
- * diffuse innovations and successful programs implemented in the lead community
- * develop a communications network both within lead community and between lead community and outside individuals and institutions
- * facilitate outside funding

Best Practices

The discussion on Best Practices, was based on the paper by Barry Holtz made the following points. (Appendix II)

We should be looking for best elements (the best way to teach Hebrew, the best preschool program, etc.) and not necessarily the best school. We must examine why these are the best practices and if and how these best practices might be replicated. "What works", "very good practices", and "in search of best practices" were alternate suggestions for how this topic should be considered. It was also suggested that the development of best practices should be treated iteratively so that in each successive round, the process would be tested and refined.

AMERICAN JEWISH
BEST PRACTICES
ARCHIVES
NEXT STEPS

I Collection

- A. Collection of Data
 - a) human resources (practitioners, experts in field, researchers to guide/evaluate best practices)
 - b) program resources or institutional resources
- B. Utilization of Data
 - a. list program elements for enabling options (personnel, recruitment, training etc.)
 - b. prioritize programmatic options
 - c. create a process for validating these options
 - d. unpack each of the high priority options
 - e. recruit and solicit program exemplars
 - f. undertake preliminary analyses of submissions in (e)
 - g. disseminate
 - h. set up feedback loop

II. Service to Lead Community

- a. In each programmatic area, appoint a co-ordinator to undertake A, d,e,f (above).
- b. provide resources to service the community

III Research

- a. Start thinking about research on programmatic issues.
- b. Create and develop a programmatic research agenda
- c. Study program options for evaluation, quality controls and translation to lead communities.
- d. Appoint two groups: One for best practices, one for recruitment.

*All the above must be fit into a time line. The following issues are to be clarified.

- * When and how should dissemination take place?
- * What will be the role of organizations, institutions, individual experts, and researchers
- * What is the relationship between best practice and the lead community?
- * What are the methodological research needs to track this year by year?

Application and Selection of a Lead Community

The following issues arose in the course of discussions on the procedures for establishing a lead community.

We must decide whether we want to work toward the goal of a small number of centralized lead communities needing much guidance from outside or a larger number of decentralized communities in which there could be a maximum amount of experimentation. Also to be considered are, what services can we provide to the very promising community which does not currently meet all the criteria and when should the foundations and national institutions be involved in this process.

Working to Establish a Lead Community

Application and Selection

NEXT STEPS

A Two round screening process is proposed

I Application

Criteria for Round 1 Application:

1. City Size (to be based on CJF criteria)
 - a. Intermediate (at least 15,000)
 - b. Large Intermediate
 - c. Large (below 1/2 million)

1. Round one:

- a. A public request for proposal
- b. A selection of 10 plus 10 communities

2. Round two:

- a. A more detailed application requested of 10 - 20 leading candidates
- b. Finalists invited to full day seminar
- c. On site visits to communities
- d. List of finalists sent to Senior Policy Advisors for comments
- e. Teleconference of committee of Board members

11. Commitment

The president of the community's Federation would submit a statement of commitment including:

- a. Evidence of ability to mobilize all elements of the community
- b. Evidence of planning process, initiatives and progress in Jewish education within the past 5 years
- c. Evidence of lay leadership commitment and potential to recruit strong community leaders
- d. Survey of potential sources for funding
- e. Commitment to involve all stakeholders
- f. Agreement to create an environment conducive to innovation and experimentation in Jewish education.
- g. Commitment to developing personnel
- h. A statement explaining why this community should be a lead community.
- i. A sample of letters indicating support by various stakeholders and leaders.

Time Line

1. RFP - early September
2. Applications in by October 15
3. Decision (including CIJE Board) by mid November
4. Seminar for 10 communities - early December to review concept and process. Each community will send one professional and one lay leader.
5. Second round applications in by late January
6. Decision by March 1, 1991 (latest)

Professional Development

This group dealt with all areas of professional development other than recruitment and training. The areas discussed included: compensation; career path; status; and the professionalization of education; the expansion of the Cleveland model of community teachers; the distinction between part time, full time and avocational teachers in providing social benefits. Also discussed was the role of the CIJE in professional development. The discussion was limited to professional development of formal education.

PROFESSION BUILDING

NEXT STEPS

1. CIJE must develop an operating philosophy which looks into the issue and examines profession building.

2. Compensation

- a. establish a working group on compensation to deal with the need for and means of establishing standards for full time teachers
- b. Determine standards for avocational personnel.
- c) Consider health and pension benefits

3. Status/Networking

- a. Develop a professional association
- b. Encourage associations to share values and practices.
- c. Encourage publications and assist in dissemination
- d. Encourage CIJE to promote association with national organizations and assess to which this leads to improvement
- e. Work to making national organizations more effective

4. Occupational Structure

- a. (1) Examine feasibility of "community teachers" -
(2) Test applicability in different frameworks

5. Professionalization of Education

- a. Establish career paths in education
- b. Consider training programs for upgrading avocational teachers
- c. Encourage trips to Israel for recruitment, retention, improvement.

Consensus: There is a need for a task force on the professional development area.

Recruitment and Training:

The discussion was based on Jacob Ukeles's paper, "Proposal for Developing a National Strategic Plan for Training of Jewish Educators". (Appendix III) The purpose of the paper was to present a strategic national plan to help the CIJE to deal with the training of Jewish educators for both formal and informal education. The time span envisioned is 3-5 years. The proposal has four objectives:

- a) an assessment of resources and needs
- b) the plan itself - an image of future training systems
- c) a 3-5 year implementation plan
- 4) the beginning of a developing database

TRAINING JEWISH EDUCATORS

NEXT STEPS

Start-Up

- a. Review project purposes, methods and work plan with the Board, professional advisors and the staff of CIJE
- b. Define working assumptions and priorities

Resources and Needs Analysis

- a. Assess in-service and pre-service training needs of Jewish educators in both formal and informal settings.
- b. Determine annual demands for educators
- c. Estimate numbers of Jewish educators now being trained and areas of expertise

Strategic Issues

- a. Elicit views of lay leaders, professionals, subject area experts on design and implementation of the training system.

Classify Issues

- a. Establish choices regarding to the vision and philosophy of Jewish education and the capacity of different types of training institutions to deal with them.
- b. Examine advantages of local, regional and national systems
- c. What should be the role of the denominational institutions?
- d. To what extent should existing institutions be utilized and to what extent should new ones be created?
- e. To what extent do present institutions have the organizational and financial resources to implement program

Project Statement

- a. A paper will be prepared framing the responses to needs assessment and describing a model of a future training system

Implementation

- a. A detailed implementation plan will be developed that specifies major tasks, responsibility for tasks, annual costs and time frames.

Consensus of Group

Professional development is more than training. It must also be experiential and there is a need for a bottoms up as well as a tops down approach. The major national training institutions should be brought in from the very beginning, for practical as well as political reasons. Also, local institutions should be contacted as well as other bodies such as training institutions in general education, and organizations such as the JCAA. The place of Israel as a center for the training of Jewish personnel must also be fit into the scheme.

Research

The Commission made research a high priority. Currently, there is a lack of reliable data, a lack of evaluation resources, and a paucity of qualified researchers. Isa Aron's paper, "Setting a Research Agenda for Jewish Education" was the basis for the discussion on how the CIJE could work to increasing research capability. (Appendix IV)

Among the reasons for the lack of research are: most of it is carried out by doctoral students and is of small scope; there is no infrastructure such as that in general education to support it; there is not a general sensitivity to the importance of the collection of data, and much of the research which is available is that of isolated studies with little replication.

SETTING A RESEARCH AGAENDA

NEXT STEPS

1. Poll all the people here for a list of candidates for an Advisory Board (9-11 individuals).
2. Solicit a list of needed research areas, researchers, bibliographies, etc.
3. Recast the paper incorporating some of the ideas and suggestions elicited from the working group here.
4. Prepare an informed list of options to present to the Advisory committee.
5. Use these as a basis for a brainstorming session with the Advisory Board to help determine options for achieving the

goal of more and better research faster.

6. Cluster the options. Examine the set of assumptions behind each option and evaluate each in terms of feasibility, effectiveness, cost, and time.

7. Reconvene Advisory Board to present conclusions, and get evaluation.

8. Present final form to CIJE representatives.

Consensus:

Three research projects that must be interfaced on a time line are best practices, monitoring/evaluation, and research capabilities. These research projects should be co-ordinated by Shulamit Elster. The paper on research capabilities must include a structure for a permanent capability for ongoing research.

Monitoring and Evaluation of the Feed Back Process.

The basis of this discussion was Adam Gamoran's Paper "Thoughts on a Research Agenda in the Lead Community".(Appendix V) It was stated at the outset that a better title would have been "The Monitoring and Evaluation of the Feed Back Process". Among the areas to be dealt with is the question What it is about a Jewish educational setting that enables people to gain a lot? It was emphasized that it is essential to deal with schools within the context of a community and not as isolated institutions. Also, a methodology must be developed to deal with difficult situations where there are more variables than cases.

MONITORING AND EVALUATION OF FEED BACK PROCESS

NEXT STEPS

Project Design

Field Work Component

One half time field research in each lead community,
preferably an anthropologist or evaluation expert
One full time lead research to carry out training program

Responsibilities/ Time Line

- * See to collection of all descriptive, quantitative information.
- * Monitor process of innovation and change.
- * Produce 9 month report for formative evaluation.
- * Continue data collection, monitoring.
- * Hire reflective practitioners.
- * Field worker writes 21 month report.
- * Decision making on basis of reports.

It was also recommended that a thought piece on the aims of Jewish education should be commissioned and presented to the CIJE. From the recommendations of the CIJE, a systematic list of outcomes would be generated. These would then be presented to J. Coleman who would be asked for his advice as to how we might develop instruments to measure these achievement goals.

The group cautioned that evaluation can be a very sensitive area. It is essential that evaluation mechanisms be built into all projects "up front". Also, we must be sensitive to unanticipated outcomes and tacit outcomes. While researchers are aware of the possibility of failure as the outcome of any undertaking, lay leadership will look for success.

The Community

"Enhancing Jewish Education through Community Development" by Mark Gurvis and Jonathan Woocher was the basis for this discussion.

The essential question is how do we work with lay leadership at all levels. The discussion centered around a series of lead questions and approaches to how these questions could be answered.

The Questions:

1. What are the criteria by which we judge effective leadership?
2. What is the best structure for the governance of Jewish education?
3. Intra-communal linking. Is there a way of constructing overarching linkages between different leaders.
4. Can we establish lay-professional leaderships?
5. How do we train lay leaders in Jewish education?
6. How do we develop trans-local leadership?

Approaches:

1. Make leaders feel themselves productively engaged
2. Mentoring: match up "stars" with new potential leadership
3. Develop training programs to help people in their roles
4. Tap adult leaders as potential leaders.
5. Facilitate the development of a continental network among possible funders.

Consensus: There is a need to build a constituency. This must be part of the plan of every community. Structure and governance should be left out at the beginning or made optional because tampering with existing structures could undermine the whole program.

Recommendation: Turn to Stanley Horowitz and Carmi Schwartz for their assistance in dealing with this issue.

Summation:

The final session of the conference was devoted to a summing up and expansion of ideas presented at earlier sessions. The major issues discussed were those related to the enabling options which a community must take upon itself in order to become a lead community. The working group agreed on the following:

Each lead community will be expected to develop an explicit plan of what its personnel needs are and how it intends to go about satisfying these needs.

The plan must be comprehensive and include components dealing with recruitment, training, profession building and retention.

Both recruitment and training of personnel must be dealt with. While the two are related, it would be advisable to deal initially with each independently.

Different communities have different needs and different champions backing different projects. CIJE must take this into account and cannot superimpose its agenda.

It is expected that a community which has gone through round one and round two of the acceptance process will have selected a minimum of significant programmatic options. Gaps, to the extent that they exist will come to light during this process.

There must be national, regional, and local strategies for dealing with recruitment and training. An element of the training strategy would be a feeder system. The CIJE would play a facilitator/brokerage role in all the above.

July 4, 1991

Draft 1

The Second Jerusalem Workshop of the CIJE

Implementing the Recommendations of the
Commission for Jewish Education in North America:

Documents for Discussion—Prepared by S. Fox and A. Hochstein

Introduction

During its initial setting up period the CIJE has succeeded in establishing a human, organizational, and financial infrastructure that is now ready to launch work on several of the recommendations of the Commission. A first workplan and time line were established that include the following elements (Exhibit 1):

- Establishing Lead Communities
- Undertaking a “best practices” project
- Drafting a policy paper towards the establishment of a research capability in North America
- Building community support, including the preparation of a strategic plan
- Developing a masterplan for the training of personnel
- Developing and launching a monitoring, evaluation and feedback program alongside the implementation work

This paper will deal with Lead Communities. Separate papers will be prepared on each of the other elements (forthcoming).

Lead Communities

In the pages that follow we will outline some of the ideas that could guide the CIJE's approach to Lead Communities.

1. What is a Lead Community?

In its report *A Time to Act* the Commission on Jewish Education in North America decided on the establishment of Lead Communities as a strategy for bringing about significant change and improvement in Jewish Education (Exhibit 2). A Lead Community (LC) will be a site—an entire community or a large part of it—that will undertake a major development and improvement program of its Jewish education. The program—prepared with the assistance of the

CJJE, will involve the implementation of an action plan in the areas of building the profession of Jewish education, mobilizing community support and in programmatic areas such as day-schools or Israel experience programs. It will be carefully monitored and evaluated, and feedback will be provided on an ongoing basis.

Several Lead Communities will be established. Communities selected for the program will be presented with a menu of projects for the improvement of Jewish education. This menu, prepared by the staff of the CJJE, will include required programs (e.g., universal in-service education; recruiting and involving top lay leadership; maximum use of best practices) as well as optional programs (e.g., innovation and experimentation in programmatic areas such as day schools, supplementary schools; summer camps; community center programs; Israel experience programs). Each LC will prepare and undertake the implementation of a program most suited to meet its needs and resources, and likely to have a major impact on the scope and quality of Jewish education provided. Each community will negotiate an agreement with the CJJE, which will specify the programs and projects to be carried out by the community, their goals, anticipated outcomes, and the additional resources that will be made available. Terms for insuring the standards and scope of the plan will also be spelled out. The agreement will specify the support communities will receive from the CJJE. A key element in the LC plan is the centrality of on-going evaluation of each project and of the whole plan.

Through the LCs, the CJJE hopes to implement a large number of experiments in diverse communities. Each community will make significant choices, while they are being carefully guided and assisted. The data collection and analysis effort will be aimed at determining which programs and combination of programs are more successful, and which need modification. The more successful programs will be offered for replication in additional communities, while others may be adapted or dropped.

This conception of Lead Communities is based on the following conceptions:

- a. **Gradual Change:** A long-term project is being undertaken. Change will be gradual and take place over a period of time.
- b. **Local Initiative:** The initiative for establishing LCs will come from the local community. The plan must be locally developed and supported. The key stakeholders must be committed to the endeavor. A local planning mechanism (committee) will play the major role in generating ideas, designing programs and implementing them. With the help of the CJJE, it will be possible for local and national forces to work together in designing and field-testing solutions to the problems of Jewish education.
- c. **The CJJE's Role: Facilitating implementation and ensuring continental input.** The CJJE, through its staff and consultants will make a critical contribution to the development of Lead Communities. (See Item 2a below.)
- d. **Community and Personnel:** Meaningful change requires that those elements most critical to improvement be addressed. The Commission has called these "the building blocks of Jewish education" or "enabling options." It decided that without community support for Jewish education and dealing with the shortage of qualified personnel, no systemic change is likely to occur. All LCs will therefore, deal with these elements. The bulk of the thinking, planning, and resources will go to addressing them.

e. **Scope and Quality:** In order for a LC's plan to be valid and effective, it must fulfill two conditions:

1. It must be of sufficient *scope* to have a significant impact on the overall educational picture in the community.
2. It must ensure *high standards* of quality through the input of experts, through planning, and evaluation procedures.

f. **Evaluation & Feedback-Loop:** Through a process of data- collection, and analysis for the purposes of monitoring and evaluation the community at large will be able to study and know what programs or plans yield positive results. It will also permit the creation of a feedback-loop between planning and evaluation activities, and between central and local activities.

g. **Environment:** The LC should be characterized by an environment of innovation and experimentation. Programs should not be limited to existing ideas but rather creativity should be encouraged. As ideas are tested they will be carefully monitored and will be subject to critical analysis. The combination of openness and creativity with monitoring and accountability is not easily accomplished but is vital to the concept of LC.

2. Relationship Between the CIJE and Lead Communities

a. The CIJE will offer the following support to Lead Communities:

1. Professional guidance by its staff and consultants
2. Bridge to continental/central resources, such as the Institutions of Higher Jewish Learning, JESNA, the JCCA, CJF, the denominations, etc.
3. Facilitation of outside funding—in particular by Foundations
4. Assistance in recruitment of Leadership
5. Ongoing trouble-shooting (for matters of content and of process)
6. Monitoring, evaluation and feedback loop
7. Communication and networking

b. Lead Communities will commit themselves to the following elements:

1. To engage the majority of stakeholders, institutions and programs dealing with education in the planning process—across ideological and denominational points of view.
2. To recruit outstanding leadership that will obtain the necessary resources for the implementation of the plan.
3. To plan and implement a program that includes the enabling options and that is of a scope and standard of quality that will ensure reasonable chance for significant change to occur.

3. The Content:

The core of the development program undertaken by Lead Communities must include the “enabling options.” These will be required element in each LC program. However, communities will choose the programmatic areas through which they wish to address these options.

a. Required elements:

1. Community Support

Every Lead Community will engage in a major effort at building community support for Jewish education. This will range from recruiting top leadership, to affecting the climate in the community as regards Jewish education. LCs will need to introduce programs that will make Jewish education a high communal priority. Some of these programs will include: new and additional approaches to local fund-raising; establishing a Jewish education "lobby," inter-communal networking, developing lay-professional dialogue, setting an agenda for change; public relations efforts.

2. Personnel Development:

The community must be willing to implement a plan for recruiting, training, and generally building the profession of Jewish education. The plan will affect all elements of Jewish education in the community: formal; informal; pre-service; in-service; teachers; principals; rabbis; vocational; a-vocational. It will include developing a feeder system for recruitment; using previously underutilized human resources. Salaries and benefits must be improved; new career paths developed, empowerment and networking of educators addressed. The CJE will recommend the elements of such a program and assist in the planning and implementation as requested.

b. Program areas

Enabling options are applied in programmatic areas. For example, when we train principals, it is for the purpose of bringing about improvement in schools. When supplementary school teachers participate in an in-service training program, the school should benefit. The link between "enabling" and programmatic options was made clear in the work of the Commission. It is therefore proposed that each lead community select, as arenas for the implementation of enabling options, those program areas most suited to local needs and conditions. These could include a variety of formal and informal settings, from day-schools, to summer camps, to adult education programs or Israel experience programs.

c. The Role of the CJE

The CJE will need to be prepared with suggestions as to how LC's should work in program areas. Therefore it will need to build a knowledge base from the very inception of its work. The CJE will provide LCs with information and guidance regarding "best practices" (see separate paper on "best practices"). For example, when a community chooses to undertake an in-service training program for its supplementary school or JCC staff, it will be offered several models of successful training programs. The community will be offered the rationale behind the success of those programs. They will then be able to either replicate, make use of, or develop their own programs, in accordance with the standards of quality set by those models.

d. Outcomes

The Commission on Jewish Education in North America was brought into existence because of an expressed concern with “Meaningful Jewish Continuity.” The pluralistic nature of the Commission, did not permit it to deal with the goals of Jewish education. However the question of desired outcomes is a major issue, one that has not been addressed and that may yield different answers for each ideological or denominational group in the community. The role of evaluation in the process of Lead Communities will require that the question of outcomes be addressed. Otherwise, evaluation may not yield desired results. How will this be handled? Should, for example, each group or institution deal with this individually? (e.g. ask each to state what is educationally of importance to them). Should it be a collective endeavor? The CIJE may have to develop initial hypotheses about the desired outcomes, base its work on these and amend them as work progresses.

4. Monitoring, Evaluation and Feedback-loop

The CIJE will establish an evaluation project (unit). Its purpose will be three-fold:

1. to carry out *ongoing monitoring of progress* in Lead Communities, in order to assist community leaders, planners and educators in their daily work. A researcher will be commissioned and will spend much of his/her time locally, collecting and analyzing data and offering it to practitioners for their consideration. The purpose of this process is to improve and correct implementation in each LC and between them.
2. to *evaluate progress* in Lead Communities—assessing, as time goes on, the impact and effectiveness of each program, and its suitability for replication elsewhere. Evaluation will be conducted in a variety of methods. Data will be collected by the local researcher and also nationally if applicable. Analysis will be the responsibility of the head of the evaluation team with two purposes in mind: 1) To evaluate the effectiveness of individual programs and of the Lead Communities themselves as models for change, and, 2) To begin to create indicators and a data base that could serve as the basis for an ongoing assessment of the state of Jewish education in North America. This work will contribute to the publication of a periodic “state of Jewish education” report as suggested by the Commission.
3. *The feedback-loop*: findings of monitoring and evaluation activities will be continuously channelled to local and central planning activities in order to affect them and act as an ongoing corrective. In this manner there will be a rapid exchange of knowledge and mutual influence between practice and planning. Findings from the field will require ongoing adaptation of plans. These changed plans will in turn, affect implementation and so on.

5. Recruitment and Selection of Lead Communities

Several possible ways for the recruitment of LC's should be considered.

1. Communities, thought to be appropriate could be invited to apply, while a public call-for-proposal would also make it possible for any interested communities to become candidates.
2. Another method could be for the CIJE to determine criteria for the selection of communities and encourage only those appearing most suitable to apply as candidates.

As part of the application process for participation, candidate communities will be invited to undertake an organizational process that would lead to:

- a. The recruitment of a strong community leader(s) to take charge of the process and to engage others to assist in the task.
- b. Establishing a steering committee/commission to guide the process including most or all educational institutions in the community.
- c. Conducting a self-study that will map the local state of Jewish education, identifying current needs and detailing resources.
- d. Engaging a professional planning team for the process.

Some or all of these elements may already exist in several communities.

A side benefit from such a process would be community-wide publicity regarding the work of the CIJE and the beginning of a response to the expectations that have been created.

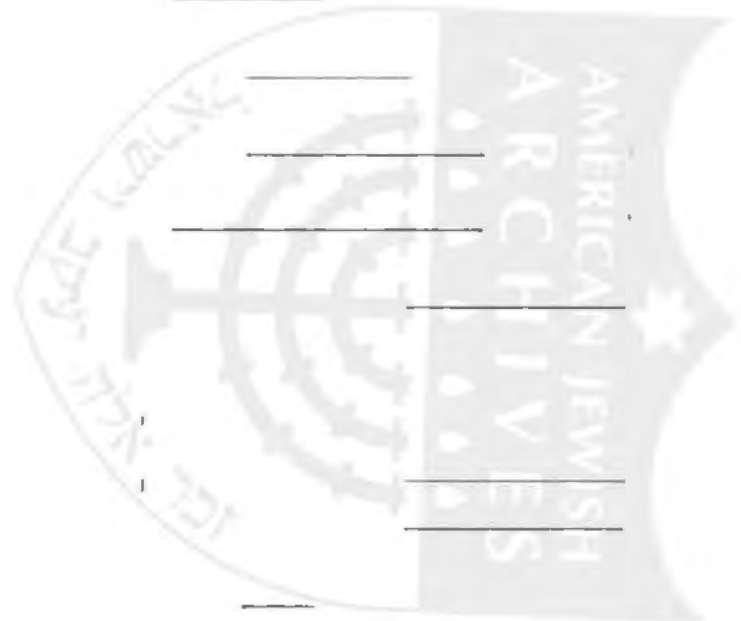
Criteria for the selection of Lead communities were discussed at the January Workshop and at the March meeting of Senior Policy Advisors (Exhibit 3). They must now be refined and finalized.

* * * * *

We hope that this document will help us in our discussions at the seminar. It is meant to be modified, corrected and changed. In addition we will need to consider some of the following issues:

1. How will the CIJE gear itself up for work with the LC? In particular it will have to recruit staff to undertake the following:
 - a. Community relations and community development capability
 - b. Best Practices
 - c. Planning; research; monitoring, evaluation and feedback loop (a research unit?)
 - d. Overall strategies for development (e.g. plan for the training of educators; development of community support).
 - e. Development of financial resources—including work with foundations, federations and individuals.
2. How many Lead Communities can be launched simultaneously? This will require a careful consideration of resources needed and available.
3. What are the stages for establishing an LC, from selection, to planning, to undertaking first programs and activities.

	1991												1992					
	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6			
1. Lead Communities	<hr/>																	
a. Articulate strategy & plan	<hr/>																	
b. Simulate Lead Community	<hr/>																	
c. Develop menu of projects	<hr/>																	
e. Develop recruitment process for LC	<hr/>																	
1. Conditions for participation	<hr/>																	
2. Recruitment Strategy (call for proposals?)	<hr/>																	
3. Invite candidates to full-day seminar	<hr/>																	
(a) Plan seminar	<hr/>																	
(b) Send materials	<hr/>																	
4. Develop terms of agreement (CIJE-LC)	<hr/>																	
f. Develop selection process	<hr/>																	
g. Jerusalem Planning Workshop (2)	<hr/>																	
h. Recruit "Fellows of the CIJE"	<hr/>																	
i. Discuss strategy & plan with Senior P.A. & CIJE board	<hr/>																	
j. Staff for CIJE	<hr/>																	
1. Director	<hr/>																	
2. Planners	<hr/>																	
k. Recruit & Select LCs	<hr/>																	
1. Announce decision Lead Communities	<hr/>																	



July 1, 1991

CIJE TIME LINE -- APRIL 1991-JUNE 1992

Exhibit 1

					1991										1992				
	4	5	6	7	8	9	10	11	12	1	2	3	4	5	6				

m. Negotiate terms

n. Launch Lead Communities (set up local planning & implementation group)

o. Data collection, Evaluation & Feedback loop

1. Hire researchers (for LC; coordinators; Steering Committee; Researchers in LC)

2. Launch research

3. Diffuse findings

p. Best Practices

1. Hire consultant & launch

2. Diffuse findings

q. Communication programs

1. LC network &

2. Other communities

2. Community Support

a. Prepare Strategic Plan

b. The CIJE Board

1. Campers

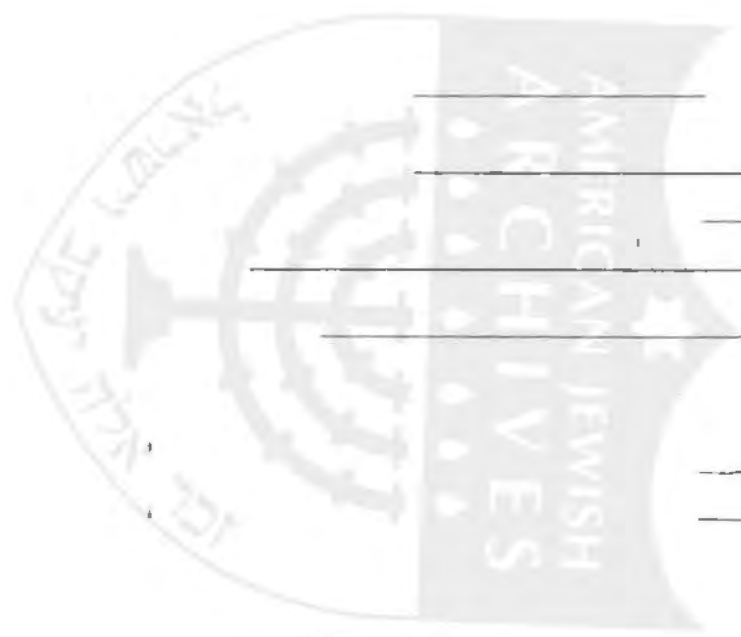
2. Board meetings

3. Interim communications

c. Senior Policy Advisors

1. Meetings

2. Interim communications



1991

4 5 6 7 8 9 10 11 12 1 2

1992

3 4 5 6

d. The Community-at-Large

- 1. Develop communications program

e. Work with Foundations

- 1. Engage foundations
- 2. Joint planning of specific areas (e.g., Israel Experience; media; Early Childhood; supplementary schools; research)

3. Develop a Research Capability

- a. Commission policy paper
- b. Engage Foundation for Implementation

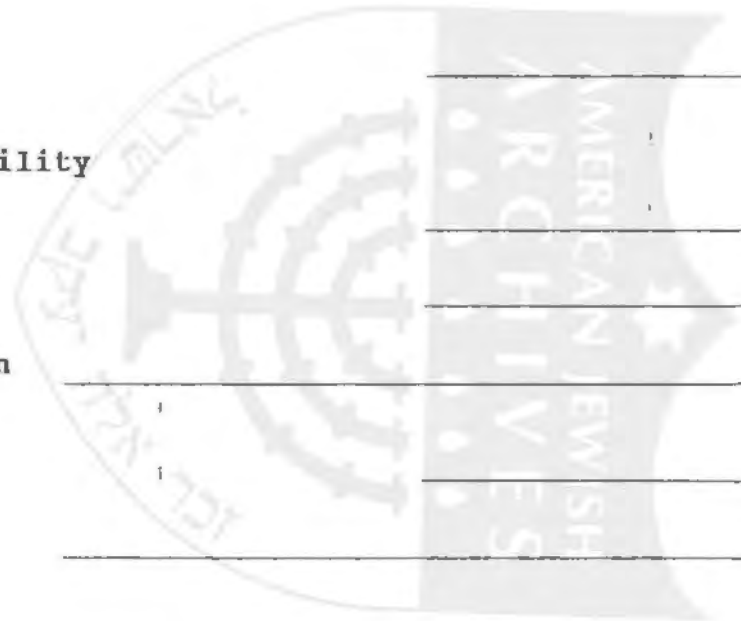
4. Developing the Profession

- a. Training
 - 1. Prepare comprehensive plan
 - 2. Work w/ HAF & training institutions

- b. Ladder of Advancement
- c. Terms of Employment
- d. Etc.

5. Quality Control

- a. Develop method for CIJE



III: ESTABLISHING LEAD COMMUNITIES

Many of the activities described above for the building of a profession of Jewish educators and the development of community support will take place on a continental level. However, the plan also calls for intensified local efforts.

Local Laboratories for Jewish Education

Three to five model communities will be established to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, when the importance of Jewish education is recognized by the community and its leadership, and when the necessary funds are secured to meet additional costs.

These models, called "Lead Communities," will provide a leadership function for other communities throughout North America. Their purpose is to serve as laboratories in which to discover the educational practices and policies that work best. They will function as the testing places for "best practices" — exemplary or excellent programs — in all fields of Jewish education.

Each of the Lead Communities will engage in the process of redesigning and improving the delivery of Jewish education through a wide array of intensive programs.

Selection of Lead Communities

Fundamental to the success of the Lead Communities will be the commitment of the community and its key stakeholders to this endeavor. The community must be willing to set high educational standards, raise additional funding for education, involve all or most of its educational institutions in the program, and thereby become a model for the rest of the country. Because the initiative will come from the community itself, this will be a "bottom-up" rather than a "top-down" effort.

A number of cities have already expressed their interest, and these and other cities will be considered. The goal will be to choose those that provide the strongest prospects for success. An analysis will be made of the different communities that have offered to participate in the program, and criteria will be developed for the selection of the sites.

Once the Lead Communities are selected, a public announcement will be made so that the Jewish community as a whole will know the program is under way.

Getting Started

Lead Communities may initiate their programs by creating a local planning committee consisting of the leaders of the organized Jewish community, rabbis, educators, and lay leaders in all the organizations involved in Jewish education. They would prepare a report on the state of Jewish education in their community. Based on their findings, a plan of action would be developed that addresses the specific educational needs of the community, including recommendations for new programs.

An inventory of best educational practices in North America would be prepared as a guide to Lead Communities (and eventually made available to the Jewish community as a whole). Each local school, community center, summer camp, youth program, and Israel experience program in the Lead Communities would be encouraged to select elements from this inventory. After deciding which of the best practices they might adopt, the community would develop the appropriate training program so that these could be introduced into the relevant institutions. An important function of the local planning group would be to monitor and evaluate these innovations and to study their impact.

The Lead Communities will be a major testing ground for the new sources of personnel that will be developed. They will be a prime target for those participating in the Fellows program as well as the Jewish Education Corps. In fact, while other communities around the country will reap the benefits of these programs, the positive effects will be most apparent in the Lead Communities.

The injection of new personnel into a Lead Community will be made for several purposes: to introduce new programs; to offer new services, such as adult and family education; and to provide experts in areas such as the teaching of Hebrew, the Bible, and Jewish history.

Thus Lead Communities will serve as pilot programs for continental efforts in the areas of recruitment, the improvement of salaries and benefits, the development of ladders of advancement, and generally in the building of a profession.

Criteria for the Selection of Lead Communities

Senior Policy Advisors

What Criteria Should be Used in Selecting Lead Communities?

The following criteria will be considered in selecting lead communities:

- a. City size
- b. Geographic location
- c. Lay leadership commitment
- d. The existence of a planning process
- e. Financial stability
- f. Availability of academic resources
- g. Strength of existing institutions
- h. Presence of some strong professional leadership
- i. Willingness of community to take over process and carry it forward
- j. Replicability
- k. Commitment to coalition building (synergism)
- l. Commitment to innovation
- m. Commitment to a "seamless approach," involving all ages, formal and informal education
- n. Commitment to the notion of *Clal Yisrael*—willingness to involve all segments of the community
- o. Agreement with the importance of creating fundamental reform, not just incremental change

Criteria for the Selection of LCs

January 1991 Workshop

Possible considerations in selection process:

1. City size
2. Geographical location
3. Lay leadership commitment
4. Planning process underway
5. Financial stability
6. Availability of academic resources
7. Strength of existing institutions
8. Presence of some strong professional leadership
9. Willingness of community to take over process and carry it forward after the initial period

In general, there was difficulty in conceptualizing a clear set of criteria for choosing lead communities—and in deciding among the goals of replicability/demonstrability/models of excellence. What emerged from this discussion was consensus on the idea of differentiated criteria: different communities might be chosen for different reasons. On the other hand, we clearly cannot afford to fail: however we choose candidates, we must be convinced that between the community's resources and our own, success is likely.

C. Personnel

1. New people
2. New positions
 - a. Career ladder must be horizontal as well as vertical
3. Thoughtful improved conditions
4. Ongoing education for staff
 - a. Lead community -- targeted game plan
5. Recruitment strategies
6. Positing training institutions and other national resources
7. Implementation must take into account understanding, motivation and ability
8. Empowerment/involvement of front-line educators in the process

A. Community

The following elements should characterize what is involved in what we call the community component of the lead community:

1. Understanding

2. The communities identified and engaged and knowledgeable as well as articulate about the project.

In addition, it has 1) a champion, 2) a leadership group, 3) a wall-to-wall process.

Where the different ideologies or points of view are represented.

3. Increased local funding for Jewish education

4. Ongoing advocacy (community-at-large)

5. There is a local CIJE (implementation mechanism) with a professional head

6. There are local and continental joint planning and joint activities

7. There is effective governance and effective governance structure in place (centralized or de-centralized)

8. There is an ongoing public debate on educational issues (ferment or what we call in Hebrew "tesisa").

over
Explicit + Honesty + respect

CONTENT

Vision - cumulative definition based on:

- the mission of Jewish education for each constituency
 - articulated
 - specifically
- excellence aspired to
- goals specified by/for each
- scope
- minimum standards
- rationale made explicit

SPECIFIC (CONTENT)

SCOPE

formal
informal
Israel
age Group
proportion of people affected

STANDARDS

continuous - ongoing
staff education of minimal scope (weekly?) by high level
qualified trainers
best practices applied through explicit learning and
reinventing process
cumulative impact aimed at consciously?

COMMUNITY

- understanding
- identified and engaged and knowledgeable
 - leadership group
 - champion
 - wall-to-wall (ideologies represented)
- increased (local) funding
- ongoing advocacy (community at large)
- local "CIJE" (implementation mechanism) with professional head
- local and continental joint planning and activity

*Effective Governance Structure in place centralized or decentralized

*Public debate on educational issues

PERSONNEL

- new people
- new positions
 - career ladders must be horizontal as well as vertical
- thoughtful, improved conditions
- ongoing education for staff
 - L.C. - targeted game plan
- recruitment strategies
- positioning training institute and other national resources
- implementation must take into account understanding, motivation and ability
- empowerment - involvement of front line educators in process

