MS-831: Jack, Joseph, and Morton Mandel Foundation Records, 1980 – 2008.
Series E: Mandel Foundation Israel, 1984 – 1999.

Box   Folder
D-1   1914

CIJE correspondence, meetings, and planning documents. Lead Communities reports, 1992-1993.

```
************************************************************************
   *
*****        REPORT                ( FEB 10 '93 15:36 ) :MANDEL INSTITUTE    *****
   *
   *   ************************************************************************
   *
*  DATE    START     REMOTE TERMINAL      MODE       TIME      TOTAL  RESULTS DEPT.  *
*          TIME      IDENTIFICATION                            PAGES          CODE   *
*                                                                                    *
*  FEB 10  15:35              MELTON JTS  G3ST      00'57"      001    OK    0001    *
*                                                                                    *
*                                                                                    *
*     ERROR MESSAGE:                                                                 *
*                                                                                    *
*    PAGE(S)  CONCERNED          :                                                   *
*    SERVICE CODE                :                                                   *
*                                                                                    *
*                                                                                    *
*                                                                                    *
*                                                                                    *
*                                                                                    *
*                                                                                    *
************************************************************************
```

Melton Research Center
3080 Broadway
New York, NY 10027

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

To: Annette Hochstein

At FAX Number: Mandel Inst.

From: Barry Holtz

Date: February 8 1993

Total pages including this one: 15

RE:

As you requested: here is the introduction
for Best Practice in Supp School —
can you get it to Seymour for comments?

Thanks

Barry

*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.

Council for Initiatives in Jewish Education
Best Practices Project
Best Practice in the Supplementary School

INTRODUCTION
Barry W. Holtz

What is the Best Practices Project?

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 Council for Initiatives in Jewish Education (CIJE), particularly as it works with the three "Lead Communities" chosen in the fall of 1992: Atlanta, Baltimore and Milwaukee. As these Lead Communities-- "local laboratories for Jewish education," in the words of A Time to Act-- 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 can be seen as a research project which 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.

What do we mean by "best practice"? The contemporary literature in general education points out that seeking perfection when we examine educational endeavors will offer us little assistance as we try to improve actual practice. In an enterprise as complex and multifaceted as education, these writers argue, we should be looking to discover "good" not ideal practice. As Joseph Reimer describes this in his paper for Commission, these are educational projects which have weaknesses and do not succeed in all their goals, but which have the strength to recognize the weaknesses and the will to keep working at getting better. "Good" educational practice, then, is what we seek to identify for Jewish education, models of excellence. Another way of saying it is that we are looking to document the "success stories" of contemporary Jewish education.

In having such an index the Council would be able to offer both encouragement and programmatic assistance to the particular Lead Community asking for advice. The encouragement would come through the knowledge that good practice does exist out in the field in many aspects of Jewish education. By viewing the Best Practice of "X" in one location, the Lead Community could receive actual programmatic assistance by seeing a living example of the way that "X" might be implemented in its local setting.

We should be clear, however, that the effective practical use of the best practices project is a complex matter. Knowing that a best practice exists in one place and even seeing that program in action does not guarantee that the Lead Communities will be able to succeed in

--2

implementing it in <u>their</u> localities, no matter how good their intentions. What makes a cur-
riculum work in Denver or Cleveland is connected to a whole collection of factors that may
not be in place when we try to introduce that curriculum in Atlanta, Baltimore or Milwaukee.
The issue of <u>translation</u> from the Best Practice site to the Lead Community site is one which
will require considerable imagination. I will try to indicate some ways that such translation
may occur at the end of this introductory essay.

Of course there is no such thing as "Best Practice" in the abstract, there is only Best
Practice of "X" particularity: the supplementary school, JCC, curriculum for teaching Israel,
etc. The first problem that the Best Practices Project had to face was defining the <u>areas</u> which
the inventory would want to have as its particular categories. Thus we could have cut into the
problem in a number of different ways. We might, for example, have looked at some of the
"sites" in which Jewish education takes place such as:
    --Supplementary schools
    --Day Schools
    --Trips to Israel
    --Early childhood programs
    --JCCs
    --Adult Education programs

Or we could have focused on some of the subject areas which are taught in such sites:
    -- Bible
    -- Hebrew
    -- Israel

Or we could have looked at the specific <u>populations</u> served:
    -- adults
    -- children
    -- prospective converts to Judaism

There were numerous other possibilities as well.

Our answer to the question of cutting into the problem of best practices in Jewish
education was to focus on the venues in which Jewish education is conducted. Eight different
areas were identified: supplementary schools, early childhood programs (which take place in
many different places) JCCs, day schools, the Israel experience, college campus programming,
camping/youth programs, and adult education. Obviously there are other areas that could have
been included and there were other ways of organizing the project. We chose, for example to
include Family Education <u>within</u> the relevant areas above-- i.e. family education programs
connected to synagogue schools, day schools, JCCs. etc. We could have identified it as a
separate area. We later chose to add a ninth area called "community-wide initiatives." These
were programs usually based in a BJE or Federation which aimed in a communal way to have

Introduction

a large scale impact on Jewish education— such as a plan to relate teacher's salaries to in-service education credits.

Best Practice in the Supplementary School: The Process

The first area that the Best Practices Project chose to work on was 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 the perception of failure, the Lead Communities would almost certainly want to address the "problem" of the supplementary school.

A group of experts was gathered together to discuss the issue of best practice in the supplementary school. (The list of names appears in Appendix II of this introduction.) Based on that meeting and other consultations we developed a Guide to Best Practice in the Supplementary School. The Guide represented the wisdom of experts concerning success in the supplementary school. We did not expect to find schools that "scored high" in every measure in the Guide, but the Guide was to be used as a kind of outline or checklist for writing the report.

A team of report writers was assembled and the following assignment was given to the team: using the Guide to Best Practice in the Supplementary School, locate good schools or good elements or programs within schools that might be able to "stand alone" (such as a parent education program or prayer curriculum) even if the school as a whole would not fit our definition of a best practice site.

We believed that working in this fashion we would be likely to get reliable results in a reasonable amount of time. We also knew from the outset that the Best Practices Project was created to fulfill a need. We did not have the luxury or the inclination to create a research project that would have to wait many years before its results could be made available. The model that we have employed is based on the informed opinion of expert observers. The reports that our researchers wrote were, with one exception, based on a relatively short amount of time spent in the particular schools— although all of the researchers had had some previous knowledge (sometimes quite extensive) about the school or synagogue being studied.[†] In general we tried to use researchers who began the process with a "running start": They had some familiarity with the school they were looking at to begin with and could use that prior knowledge to move the process along quickly.

[†]The "one exception" was Professor Joseph Reimer whose report was based on a long-term research project that he in conducting into two successful synagogue schools.

--4

The Reports: An Overview

The best practice reports represent a range of synagogues, schools and geographical locations. In general the focus is on the school as a whole, rather than "stand alone" programs. Our sense was that the key to success in the supplementary school tended to be a wholistic approach, especially because of the part-time nature of the enterprise.

The congregations vary in size and wealth. Some of the schools are located within large congregations which simultaneously run a whole host of programs, including early child-hood programs and day schools. The ability of the supplementary school in these congregations to "compete" with other institutions, especially the day school, is particularly noteworthy.

We believe that these reports can offer serious assistance to the Lead Communities, and others seeking to improve the quality of Jewish education in North America, but we also know that more work can and should be done. We view the reports included in the present volume as the first "iteration," in the language of social science researchers-- the first step in a process that needs to evolve over time. How might that research develop? We can see two ways: first, the research can broaden. We have only included a handful of schools in this report. The simple fact is we have no idea how many successful supplementary schools are currently operating in North America. We have certainly heard our share of bad news about the Hebrew school over the past twenty-five years, but we have heard very little about the success stories. It is likely that the number is small, nonetheless, it is clear that this "first edition" of the Supplementary School volume has touched only a few examples.

In an effort to plan for widening the net of possible sites, at the time of our first exploration of supplementary schools, we sent a letter to all the members of the CIJE Senior Advisers committee asking for their suggestions. In addition, we sent a similar letter to con-tacts within CAJE. Because of these initiatives we now have a list of 20 to 30 supplementary school that we might want to investigate in the next stage of Best Practice in the Sup-plementary School. We should note, however, that such an investigation would likely be more time-consuming than the first round. Here we will not have the advantage-- at least in most cases-- of the prior knowledge of the sites that our current researchers brought with them to the task.

A second way of expanding the research in the supplementary school area would be in 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.‡ As further iterations of the Supplementary School volume develop, we would like to see more in-depth portraits of schools and programs.

---

‡The most well-known example of the "portrait" approach is Sara Lawrence Lightfoot's book The Good High School (Basic Books, 1983.)

Improving Supplementary Schools: Some Practical Suggestions

It is obvious from these first explorations that there are numerous ways in which supplementary schools could be improved using the Best Practices Project. The following suggestions are by no means exhaustive, but they represent ways individual schools or groups of schools within a community could begin to work for change.

1. Use the Guide

A good place to start is with the "The Guide for Looking at Best Practice in the Supplementary School" (see Appendix I). Even though it was designed for use by a group of experts with considerable experience as school observers and it was not intended to be an exhaustive "evaluation tool," nonetheless the Guide offers the opportunity for "insiders" at a institution-- both professionals and laypeople-- to begin a conversation about the strengths and weaknesses of their school. Obviously, insiders will have the disadvantage of less "objectivity" than outside observers, but on the positive side they also have much more information and deeper sense of the real workings of the school. Using the Guide is a good was to start thinking about the directions supplementary school education should and could be taking.

2. Improve the School at the Systemic Level

One characteristic common to all the best practice schools was the system-wide orientation of the supplementary school. By "system-wide" we mean a number of different, but interrelated matters. First is the relationship between the school and the synagogue. At this time in the history of North American Jewish education, virtually all supplementary schools are synagogue-based institutions. One thing that characterizes a best practice school is the way that the school fits into the overall orientation of the congregation. The school reflects the values of synagogue and the synagogue gives a significant role to the school-- in its publicity, in the status of the school committee or board within the synagogue structure, in all the many subtle messages that the synagogue sends. A school that is valued and viewed as central to the concerns and mission of the synagogue has a much greater chance for success. One need only look at the reports on "Temple Isaiah" and "Congregation Beth Tzedek" for two very different examples of the same effect. Adding to the impact of this idea is the fact that both of these congregations also house day schools. Yet despite the generally held perception that the supplementary school will have a much lower status than the day school when both are housed within the same synagogue, in these two examples we see supplementary schools which are successful and profoundly appreciated by their congregations.

--6

How does the supplementary school become a valued institution? It is obvious from the best practice reports that the key player in bringing this about is the rabbi of the congregation. Virtually every best practice report talks about the investment of time, prestige and interest of the synagogue's rabbi. If we are to begin to improve the quality of the supplementary school, we must engage the rabbis in an effort to raise the stature and importance of the congregation's school.

Lay leadership also has an important role to play here, as the best practice reports point out quite clearly, and that leads us to the second element of working on the system: the stakeholders in the synagogue must be involved in an ongoing conversation about the goals and mission of the school. When the report writers talk about schools which are "driven" by their goals (see, for just one example among many, the report on "Temple Bnai Zion"), which have a clear sense of their "vision" (see, for example, "Congregation Reyim," a school with a very different vision from Bnai Zion, and which succeeds with a similar impact.) The best practice reports indicate that schools which work are places that continually try to find ways to involve the key participants in ongoing reflection upon and discussion about the goals of the school.

Finally, best practice schools are places that view their schools as one part of a much larger context. These are places that see the synagogue as a whole as an educating community. In such places we are more likely to see the integration of the formal program (the "school") with a variety of informal programs-- such as camps, shabbatonim, family retreats, trips to Israel, holiday programs, tzedakah programs, arts programs, etc.

Implications and Possible Recommendations

If we want to have an impact on the supplementary school we need to begin with the rabbis. It seems that a program of consciousness-raising and practical skills development for rabbis in the Lead Community would make a great deal of sense. Such a program could be developed through the national rabbinic organizations (RCA, RA, CCAR, RRA) or independent of them. It might include visits to the best practice sites and meetings with the rabbis in those synagogues.

A similar program for lay leaders could also be launched. Here the ideas learned from the best practice reports could be studied and explored, so that lay leaders could come to understand the educational principles that make for success in the area of the supplementary school.

3. The Leader is Crucial

If there is one thing shared by all the best practice schools, it is the key role of leadership in creating quality. In most cases the leader is the educational director; in one small synagogue ("Ohavei Shalom Congregation"), it was the rabbi in particular. These leaders provide continuity, build morale, work with the rabbi and lay leadership on issues of status

Introduction

and vision and many other things as well. In addition such a leader can help turn around a school that needs to change ("Emeth Temple"). It is the principal who helps define the institution as oriented toward problem-solving and not defeatism and, it appears, the principal also seems to be an important factor in maintaining a school without significant "discipline" problems.

The people described here can all be characterized as educational leaders. They see their role not primarily as administrative or organizational, but as educational in a variety of ways. For some it takes the path of supervision and in-service education; for others it is by being inspirational or spiritual models; for others it is in pedagogic creativity, programming or curricular improvements. There is no one single way to be an educational leader, but it is hard to imagine a successful school, based on these reports, which would not have that kind of professional leadership.

Implications and Possible Recommendations

Of course, saying that a supplementary school needs an educational leader is a good deal easier than finding such a person. But knowing the importance of leadership can lead to a number of important practical suggestions: a) when hiring an educational director, seek out a person who can provide leadership appropriate to an educational institution, not just someone who knows how to order the pencils. Such a consideration should influence the kinds of questions that are asked in an interview or solicited from recommendations. b) Investing in leadership means finding ways for educational directors to attend serious, ongoing training programs that can help them grow as leaders. c) Consultants who know about educational leadership development can help schools improve by working with . d) Places might want to develop peer groups or paired tutorials for education directors. Having a serious opportunity to grow as a professional can be enhanced by peer groups which are well-designed to focus on important educational issues or by having pairings of principals who could meet on a regular basis. Such groups could be organized denominationally or on the basis of the size and type of institution. Professional consultation and training could come from a mixture of national service institutions (UAHC, United Synagogue, etc.), institutions for higher Jewish learning (YU, JTS, HUC, etc.) and institutions from the world of general education such as universities, training organizations, or professional societies.

4. Invest in Teachers

Despite the importance of systems and the centrality of leadership, in the end schools succeed or fail because of what happens in the individual classroom. The best practice schools are all characterized by an emphasis on the teacher's key role. In different ways each of the best practice schools try to deal with the three fundamental dimensions of staffing a school: recruitment, retention, and professional growth.

For some of the best practice schools recruitment is not a major problem. A place like "Temple Bnai Zion" has a staff of veterans and experiences a very small amount of turnover.

In general, good schools tend to perpetuate themselves because their reputations are well known in the community of educators and when openings appear, teachers will want to come to work in such an institution. Here in a slightly different way, the educational leader makes a difference. Who would not want to work for the revered principal of "Congregation Beth Tzedek"?

Still, recruiting good teachers is not always easy, even for outstanding synagogues and some of the best practice schools have tried inventive solutions to deal with the problem. Certainly the most radical has been the teacher-parents used by "Congregation Reyim." This synagogue has developed a unique approach that deserves serious consideration. The pluses and minuses are spelled out in the report. The most important point of the Reyim model, however, is that the school works at training the parents for their jobs as teachers. Without that training and in-service the program could not succeed.

Other schools (such as "Congregation Beth Tzedek" and "Emeth Temple") have used teenaged teacher aides or tutors in the Hebrew school. This has the dual effect of helping out the professional teachers and finding useful involvement for the teenagers in the educational life of the congregation.

Finding ways to retain outstanding teachers is a crucial component of success. It is not easy to determine what is cause and what is effect here, but it is clear that stability of staff is one of the marks of the best practice schools. Success in retaining teachers involves a number of interrelated actions: fair pay is one thing, but this matter came up quite infrequently in the best practice investigations. More to the point was a sense of being appreciated by the educational director, the rabbi and the community as a whole. There are a number of suggestions that the reports present about teacher esteem. The key point is that this matter is directly related to the systemic issue of the congregational attitude about the role and importance of education. Where education is valued, teacher esteem will tend to be high.

An ethos of professional growth and teacher education characterizes all the best practice schools, even--one might say especially-- in places that use "nonprofessional" teachers. Professional growth opportunities have the advantage of both advancing the quality of teachers and their sense of being valued.

We have seen many forms of such professional growth, but they tend to center around three areas of focus: a) efforts to increase the subject knowledge of teachers with sessions on Bible, Hebrew or Jewish holidays as examples. These sessions are particularly important for teachers in supplementary schools who may be professional general educators (such as public school teachers who sometimes teach in supplementary schools) who have pedagogic skills but lack Jewish knowledge. b) efforts to increase the skills of classroom teaching such as discussion leading, curricular implementation or classroom management. c) efforts to build a sense of personal Jewish commitment in teachers.

The best practice schools use local central agencies, denominational organizations and at times commercial Jewish textbook publishers for teacher education sessions. Teachers are also sent to conferences, most notably the national CAJE conference, local mini-CAJE conferences where they exist, conferences connected to the various denominational educational organizations and experiences in Israel.

Introduction

Most of the best practice schools engage in professional supervision of teachers, almost always by the principal. It is also noteworthy that a number of the reports mention that the educational directors find that they do not do as much supervision of teachers as they would like.

Implications and Possible Recommendations

The area of professional growth is one that should be able to make significant impact on Jewish education quality in the supplementary school. We know from the research in general education that in-service education needs to be sustained and systematic and there are a number of ways that such programs could be implemented, aside from the worthy policy of sending teachers to the national and local CAJE conferences. The CAJE conferences play a very important role in contemporary Jewish education-- especially in lifting the morale of teachers-- but they can not be considered a sufficient answer to the question of teacher education and professional growth.

What form should professional growth take? It is clear that many different options are used. These include the three possible focal points mentioned above: Jewish subject matter knowledge, pedagogic skills, issues of Jewish commitment. The means used include: inservice programs run by national organizations, extension courses at local universities, adult education programs geared for teachers, local BJE personnel coming into the school, sessions run by the local BJE, retreats for teachers, programs in Israel geared for teachers. Generally schools must find the financing the help teachers attend these conferences and sometimes money must be found to pay for substitutes while teachers attend workshops. Some schools pay the teachers to attend such sessions or relate their salaries to specific hours of inservice training.

The best practice schools do various things to work on retaining teachers. In general the focus is on raising the status of the school, and hence teaching in the school, within the congregation as a whole. Singling out the accomplishments of teachers through the synagogue bulletin and rabbinic support is coupled with treating teachers in a professional manner, giving them the appropriate workplace and supporting teachers' trips to conferences and other inservice sessions. Different localities deal with recruitment in different ways. The efforts described in the reports of some congregations to use teenagers and parents in the school as teachers or adjunct teachers may be appropriate for adaptation by schools who have difficulty finding teachers.

5. Involve the family

"Family education" has become a catchword in contemporary Jewish education, but it is obvious from the best practice reports that the term is used in many different ways in different settings. The overall goal of family involvement is clearly an important one for many reasons. Family involvement helps support the goals of the school (and probably the quality of

Introduction

discipline in the school), reinforces what children learn in school in the home, helps give children a sense that Judaism is not "just for Hebrew school," and "empowers" parents by assisting them in doing the home-based informal educating that has been typical of Jewish life for generations. The best practice reports show that family involvement may take many forms-- adult learning, family retreats, actual teaching by parents in the school or an entire curriculum focused on family education, and others as well. There is little doubt that an increased and serious investigation of more family involvement in the synagogue school can have a powerful impact on its success.

Lead Communities and Best Practice: Implementation

In what way can the Best Practices Project directly assist the Lead Communities? We see three immediate uses of the project: knowledge, study, adaptation. First, the Best Practices Project offers "existence proofs" for the successful supplementary school, knowledge that such places actually exist. It is possible to answer "Yes" to the question, "is there a Hebrew school that works?"

Beyond merely knowing that such schools exist, we can use the best practice reports as models that can be studied. These schools "work" and they work in a variety of ways. Professor Seymour Fox has often spoken about the Best Practices Project as creating the "curriculum" for change in the Lead Communities. This should include: Exploration of the particular schools through study of the reports, meetings with the researchers who wrote them up and the educators who run those schools along with visits to the best practice sites.

Finally, it is crucial to think hard about adapting the best practice sites to the specific characteristics of the Lead Communities. It is unlikely that a program that exists in one place can simply be "injected" into a Lead Community. What must happen is a process of analysis, adaptation, revision, and evaluation. What the Best Practices Project does is give us the framework to begin the discussion, explore new possibilities and strive for excellence.

From Best Practice to New Practice

Best practice is only one element in the improvement of Jewish education. Even those programs which "work" can be improved. Other ideas as yet untried need to implemented and experimented with as well. The Lead Community idea allows us a chance 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.

<div align="center">

APPENDIX I

Council for Initiatives in Jewish Education
Best Practices Project

Barry W. Holtz

Guide for Looking at Best Practice in the Supplementary School

</div>

A "best practice" supplementary school should be a place...:

I. Systemic Issues

a. --with well articulated educational and "Jewish" goals
[What are those goals and by what means are they articulated? Meetings? Publications? Sermons?]

[What are the outcomes that the school seeks to achieve and how does the school measure success?]

b. --where stakeholders (such as parents, teachers, laypeople) are involved in the articulation or at least the validation, of these goals in an ongoing way
[What is the process by which this articulation and involvement happens?]

c. --with shared communication and an ongoing vision
[How do we see this in the day to day life of the school?]

d. --where one feels good to be there and students enjoy learning
[In what way do you see this? What is the atmosphere in classes? The nature of student behavior and "discipline"?]

e. --where students continue their Jewish education after Bar/Bat Mitzvah
[Does the school have actual data about this?]

II. Curriculum and Instruction Issues

a. --which takes curriculum seriously and has a serious, well-defined curriculum
[Is it a written curriculum? Do they use materials published by the denominational movements? By commercial publishers?]

b. --and in which, therefore, students are learning real "content"

[Do you have a sense of what the students learn? About Jewish religious life and
practice? Moral principles? History? Hebrew language? Israel, etc. In what
way, if any, does the school monitor student progress?]

c. --in which one sees interesting and "strong" teaching

[Is there a particular style of teaching that you see in the school? (Discussions?
Lectures? Group work? etc.)

Who are the teachers? What is their Jewish educational background and prepara-
tion? What is their relationship to the students?

What is the stability of the staff over time? What does the school do to help new
teachers enter the school?]

d. --in which one sees attention given to "affective" experiences for children

[Is there occasion for "practice" in Jewish living or values? For example, is there
a tzedakah project, an Israel project, a mitzvah project in the school? Is there
a Junior congregation or other opportunity for experiencing prayer? Are there
programs in the arts-- music, dance, etc? Is there a retreat or shabbaton
program for children?]

d. --with family or parent education programs

[What does the school do in this area? Do they use any specific materials or
programs? (which ones?) How often does this happen? Is there a retreat or
shabbaton program for families? Are parents required to engage in some kind
of adult learning? In what way?]

III. Supervision Issues

**a. --which engages in regular serious inservice education and/or supervision of
teachers**

[Who does the supervision? What is it like? How regular is it? Does the school use
outside consultants for inservice? Are teachers sent to inservice sessions?
Where and in what way does this take place? Is there a retreat or shabbaton
program for teachers?]

b. --with an effective principal who serves as a true educational leader

[In what way does the principal demonstrate this leadership? How do the
teachers...the parents....the rabbi perceive him/her?]

Introduction

APPENDIX II

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 (Hebrew Union College-Cincinnati)
Ms. Vicky Kelman (Melton Research Center and Berkeley, CA)
Dr. Joseph Reimer (Brandeis University)
Dr. Stuart Schoenfeld (York University, Toronto)
Dr. Michael Zeldin (Hebrew Union College-LA)

Additional Consultants:

Dr. Isa Aron (Hebrew Union College-Los Angeles)
Dr. Sherry Blumberg (Hebrew Union College-New York)
Ms. Gail Dorph (University Of Judaism, Los Angeles)
Dr. Samuel Heilman (Queens College, NY)

Introduction

Melton Research Center
3080 Broadway
New York, NY 10027

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

To: _Annette Hochstein_

At FAX Number: _Mandel Inst._

From: _Barry Holtz_

Date: _Feb /5_

Total pages including this one: _2_

RE:

My Schedule in March

*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

February 5, 1993

To: Annette
From: Barry W. Holtz
Re: My schedule

Hi Annette:

It was nice to spend time with you last week. As it turned out, be-
cause of my son's illness, we cancelled our trip to Florida. My own
cold got worse-- partially thanks to the airplane ride home from
Cleveland, my ears got messed up. So it's been a glorious few days.

I am sending this fax so you'll know that I rescheduled Florida for
March. If there is going to be that planners meeting in March I
will only be available on March 2nd; on the 3rd we are going south
(I hope) and will return on March 10th. Keep that in mind as you
think about using me for whatever.

Thanks. Best wishes to all.

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

TO: Seymour Fox   DATE: January 11

FROM: Barry Holtz   SUBJECT:

Hi Seymour:

I am now down at the CIJE office once or twice a week and am also
trying to get out a draft of Best Practice in the Supplementary School
by the beginning of February.

Art Rotman and I will be going to Milwaukee in February to meet with
their local commission and try to launch some ideas.

Shulamith and I have been thinking about Pilot projects-- she'll tell
you more about that when you talk-- but I'm hoping that we can
also begin to make contact with the other communities similar to
the Milwaukee meeting.

I know that Art is seeing the Federation person in Atlanta, so we ought
to wait until after that conversation, but I'm writing to get your
reaction on Shulamith and me setting up a meeting with the Baltimore
people to see if we can get going there. I would like to try to set
up a Best Practice ongoing "seminar" with each local commission as
one of the pilot projects. I would like to know if you would encourage
our contacting Marshall Levin in Baltimore to try to get this moving now.

What do you think? You can FAX me either here or at Melton or you could
talk to Shulamith about this when you have your phone coversation.

Barry

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

To *Seymour Fox*   From *BARRY HOLTZ*
Co.   Co.
Dept.   Phone #
Fax #   Fax #

January 5, 1993
To: CIJE Senior Advisers
From: Barry W. Holtz
Re: Update-- The Best Practices Project

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 help the CIJE in its work with the three Lead Communities (Atlanta, Baltimore, Milwaukee) which were selected last 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.

Last 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.

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. 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 now have 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 the 1991 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. We now have the first drafts of reports on ten programs and sites.

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 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 CIJE 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.

The 1992-1993 Year

Next Steps

We are now beginning to put together a Preliminary Guide to Best Practice for each of the "areas" of Jewish education. These Guides will serve the three Lead Communities in their planning process by offering examples of success and suggestions for specific improvements that could be implemented. The first Guide will be devoted to the Supplementary School area. This Guide will contain: an introduction to the concept of Best Practice, an overview of the specific area of the Supplementary School-- what characterizes a successful Supplementary School with suggestions for practical applications, the full reports (using pseudonyms) of the report writers, executive summaries of each of the full reports, and an appendix listing the researchers who have been involved in the project. Of course such a Guide will continue to grow and deepen as the research effort into Best Practice continues and subsequent "editions" of the Guides in each of the areas will expand the knowledge base for action. We hope to have the first edition of the Supplementary School area done by the beginning of February.

Following upon that publication we hope to create a second Guide in the area of Early Childhood programs which will appear about two months after the Supplementary School Guide.

During the 1992-3 year we are also launching the following areas: day schools, adult education, camping and the college campus. Each presents its own interesting challenges. Of these we have already begun to plan in a preliminary way for the day schools division. 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.

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.

3

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

Dr. 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).

Memo

January 5, 1993
To: CIJE Senior Advisers
From: Barry W. Holtz
Re: Update-- The Best Practices Project

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 help the CIJE in its work with the three Lead Communities (Atlanta, Baltimore, Milwaukee) which were selected last 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.

Last 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.

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. 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 now have 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 the 1991 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. We now have the first drafts of reports on ten programs and sites.

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 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 CIJE 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.

The 1992-1993 Year

Next Steps

We are now beginning to put together a Preliminary Guide to Best Practice for each of the "areas" of Jewish education. These Guides will serve the three Lead Communities in their planning process by offering examples of success and suggestions for specific improvements that could be implemented. The first Guide will be devoted to the Supplementary School area. This Guide will contain: an introduction to the concept of Best Practice, an overview of the specific area of the Supplementary School-- what characterizes a successful Supplementary School with suggestions for practical applications, the full reports (using pseudonyms) of the report writers, executive summaries of each of the full reports, and an appendix listing the researchers who have been involved in the project. Of course such a Guide will continue to grow and deepen as the research effort into Best Practice continues and subsequent "editions" of the Guides in each of the areas will expand the knowledge base for action. We hope to have the first edition of the Supplementary School area done by the beginning of February.

Following upon that publication we hope to create a second Guide in the area of Early Childhood programs which will appear about two months after the Supplementary School Guide.

During the 1992-3 year we are also launching the following areas: day schools, adult education, camping and the college campus. Each presents its own interesting challenges. Of these we have already begun to plan in a preliminary way for the day schools division. 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.

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.

3

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

Dr. 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).

4

MEMORANDUM

To: Annette Hochstein
            Ginny Levi

From: Jim Meier

Date: February 4, 1993

Re: Attached draft of Planning Guide

Hope you had easy return flights.

The attached draft addresses your last round of edits (Wednesday, Feb 3) and includes new material on CIJE's role on pages 3, 4, 7, 10, 13, 18, 24, 32, and 35.

TABLE OF CONTENTS

LEAD COMMUNITIES PLANNING GUIDE

"Our goal should be to make it possible for every Jewish person, child or adult, to be exposed to the mystery and romance of Jewish history, to the enthralling insights and special sensitivities of Jewish thought, to the sanctity and symbolism of Jewish existence, and to the power and profundity of Jewish faith. As a motto and declaration of hope, we might adapt the dictum that says, 'They searched from Dan to Beer Sheva and did not find an am ha'aretz!' 'Am ha'aretz,' usually understood as an ignoramus, an illiterate, may for our purposes be redefined as one indifferent to Jewish visions and values, untouched by the drama and majesty of Jewish history, unappreciative of the resourcefulness and resilience of the Jewish community, and unconcerned with Jewish destiny. Education, in its broadest sense, will enable young people to confront the secret of Jewish tenacity and existence, the quality of Torah teaching which fascinates and attracts irresistibly. They will then be able, even eager, to find their place in a creative and constructive Jewish community."

Professor Isadore Twersky
A Time to Act, p. 19

"It is clear that there is a core of deeply committed Jews whose very way of life ensures meaningful Jewish continuity from generation to generation. However, there is a much larger segment of the Jewish population which is finding it increasingly difficult to define its future in terms of Jewish values and behavior. The responsibility for developing Jewish identity and instilling a commitment to Judaism for this population now rests primarily with education."

"Recent developments throughout the continent indicate that a climate exists today for bringing about major improvements. However, a massive program will have to be undertaken in order to revitalize Jewish education so that it is capable of performing a pivotal role in the meaningful continuity of the Jewish people."

A Time to Act, pp. 15 & 16

Atlanta, Baltimore, and Milwaukee have taken on an exciting challenge and an awesome responsibility: to dramatically improve Jewish education throughout their communities, and in the process, to serve as beacons in this endeavor for others in North America. These "lead communities" will provide a leadership function for others in communities throughout the continent. 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.

INTRODUCTION

This set of guidelines has the luxury and the challenge of preaching to the converted. Jewish communities understand and have been engaged in planning for a long time. The lead communities more than many others have made pioneering efforts in planning for Jewish education and continuity. Despite that advantage, all of us are acutely aware of the limitations in the available information and the magnitude of the task of setting out a plan that addresses the challenges of the Lead Communities Project.

The purposes of these guidelines are to:

■ offer approaches, methods, data collection instruments and other tools to use in the planning process, and

■ give some measure of uniformity to the planning process that each of the lead communities will engage in.

Each community will, of course, need to tailor these guidelines to its own circumstances.

As a general principle the object is to build upon the work and the research that has already been done in each community and use those as a point of departure for the Lead Communities Project. On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.

CIJE will serve as a resource and clearinghouse for lead communities as they proceed through the planning process: offering expertise, recommendations on methods or information collection instruments, linkages to national organizations, and a means by which the communities can share their approaches with each other.

I. FIRST STEPS

"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 Time to Act, p. 68

Rationale

First steps refer to preparations, to allow for smooth sailing once the serious work gets underway.

Major Activity Areas

There are two major areas for attention:

1. Initial mobilization of leadership (lay, educators, rabbis and professionals)
2. Introducing the idea into the community

Building a "wall-to-wall coalition" of all key actors in the community who have a stake in Jewish education is an important initial step of the Lead Communities Project. A widening net of stakeholder involvement in Jewish education is one of our instruments for engaging a larger portion of the Jewish community. The mobilization of leadership is a pivotal element for achieving that objective.

The first issue is to identify and recruit core leadership to spearhead the lead communities effort, while devising a structure that allows a broad cross-section of the community to become actively engaged in the project. The leadership therefore must be carefully selected (lead communities may want to contact CIJE staff or board members for help in recruiting key people), and the structure must allow ample opportunity for constituents to obtain a stake in the process. Box 1, Concentric Circles of Leadership, suggests a possible framework for organizing the project.

Tasks

1. Identify and recruit key leadership, including:

   ■ Chair

- Lay leaders
- Major donors
- Educators
- Rabbis
- Other professionals

2. Establish the Lead Community Commission, composed with representation that includes top leadership from each of these groups and that reflects the broad spectrum of the community. E.g., leadership from:

- Federation
- Formal educational settings
  - schools
  - synagogues
- Informal educational settings
  - JCCs
  - camps
- Communal agencies and organizations dealing with education

Box 1: Concentric Circles of Leadership

One way to organize to reconcile the dual objectives of strong and thoughtful leadership coupled with wide involvement is to develop expanding circles of leadership. For example:

- Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.

- Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.

- Task Forces, to address substantive issues and make recommendations to the full Commission, and/or to monitor and evaluate projects once they begin operations (see below.)

- Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

- Compile packets of background information and distribute to each of the committee members. Box 2 contains a selection of materials that may be useful for this purpose.

Box 2: Examples of Background Materials

- A Time To Act

- Previous planning documents, particularly on Jewish education or continuity, prepared by your community.

- Other studies and documents relating to the community's educational systems.

- Summary of most recent Jewish population study for your community.

- CIJE project descriptions

    - "Best Practices"

    - Monitoring, Evaluation and Feedback

    - Goals Project

---

3. Convene Commission

   ■ Establish a detailed timetable for the project by working backward from the year one end date, as well as forward based on the amount of time work components will require.

   Working with the chairperson of the committee, establish a schedule of committee meetings all the way through the first year of planning. Scan major Jewish and national holidays for conflicts. (See Box 3 for an illustrative schedule of steps.)

   ■ Prepare a tentative agenda for the first committee meeting to review with the chair.

Box 3: Illustrative Planning Framework

Phase	Deliverable	Commission Meeting Subject

1. Start-up	• Form Commission
	  - Discuss the idea
	  - Detailed workplan
	  - Agree on mandate
	• Form committees
		1a. Review of project key ideas, aims and structures
		1b. Review of workplan: Key methods and projects
		  - Best Practices
		  - dealing with goals
		  - Monitoring evaluation feedback project
		1c. Develop charge to committees: main thrusts:
		  - personnel
		  - community mobilization

2. Start Self-study (ongoing)	• Design scheme • Profile of Jewish education: strengths and weaknesses • Survey of educators in the community • Report on findings	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	• Formulate issues	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	• Draft community mission statement	4. Approve mission/vision statement
5. Strategies and Priorities for Action	• List of recommendations for each major area (personnel, community mobilization, Israel experience) with priority rankings and priority sequencing	5. Recommendations on priorities
6. Programs	• Confer with CIJE, Best Practices • Draft guidelines • Define program priority areas and new initiatives • Issue call for program implementation proposals	6. Define program priorities
7. Resource Development	• Fundraising plan (e.g., potential donors, strategies, targets, CIJE assistance, timetable)	7. Approve and agree on assignments for carrying out plan.
8. Subsequent year action plan	• Draft budget with resource objectives • Compile summaries of program options • Prepare first year implementation plan	8a. Select programs for next year 8b. Approve overall implementation plan 8c. Set resources objectives ($)

4. Devise task force structure

It is helpful to organize task forces to address substantive issues and make recommendations to the full commission. Once pilot operations begin, the role of these committees can be modified to monitor and evaluate projects they have initiated.

There are several ways of organizing task forces. Here are some samples:

■ Main thrusts of the recommendations of the Commission on Jewish Education in North America
  o personnel
  o community mobilization
  o research/self-study
  o Israel experience

■ Delivery settings, e.g.:
  o day schools
  o supplementary schools
  o programs in informal settings

■ Functional, the classic "Board of Directors" model, e.g.:
  o pilot projects
  o best practices
  o goals/visions of Jewish education
  o monitoring and evaluation
  o fundraising
  o coalition building and marketing/networking
  o educator's survey
  o five year planning

Issues to consider in deciding on the most effective approach for organizing include:

■ Energizing: Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.

■ Priorities: Do the topics represent articulated, or likely, priority areas of the Lead Communities Project.

■ Content expertise: How do staff knowledge and other resource experts relate to the potential topics? Do any of the organizing approaches make better use of available human resources?

■ Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.

The time and commitment of top lay leaders to serve as chairs, and the depth of capable professionals to service the task forces are factors to consider in deciding on the number of committees.

II. SELF-STUDY

> "[An important step in mobilizing is...] *to review the current state of Jewish education in its various aspects. This will provide the basis for analyzing the problems, considering the achievements and shortcomings, and determining where the most promising opportunities for improvement might lie.*"

A Time to Act, p. 31

Rationale

Obtaining reliable information about something as complex as a community's educational system is an ongoing endeavor. Its payoffs are immediate, long-term, and continuous: as the community learns more about itself, its decision making will improve. Over time, the process will yield better and better quantitative and qualitative data about what exists in the community's Jewish education system, how good it is, what people in the community want, what more is needed and what works better.

Lead communities can offer leadership in this area too, developing means, methods and experience for an ongoing process of serious self-study. Hopefully, the tools developed in lead communities will be disseminated for other communities to adopt and adapt. CIJE is a resource for designing and carrying out the self-study, as well as for disseminating findings and new products.

The initial purpose of the self-study is to provide commission members with an increasingly solid foundation of information, to enlighten even the most knowledgeable insider, and to identify the critical issues and choices the commission may choose to address. It will also help move the community towards establishing standards of achievement that the community aspires to.

The self-study process is an ongoing one; it will not be completed within the first year of the project. It is proposed that during the first year of the project the self-study include the following 3 elements:

1. A *profile* of the Jewish education enterprise in the community, including the following:

   - Participation (absolute numbers, rates and trends)
   - Inventory of personnel, programs, institutions, organizations
   - Program resources
   - Financial resources

2. A *needs analysis* to focus during the first year on personnel-related issues, a central part of which will be an educator's survey.

3. A *follow-on agenda* for continuing analysis during years 2-5.

---

1. **Profile**

a. Develop demographic profile of Jewish education needs in the community.

 ■ Jewish population characteristics: cohort sizes (e.g., early childhood, school age lay leaders, adult education learners, college-age youth, other special groups, like mixed married couples)

b. Develop inventory of program capacities and participation rates (formal and informal programs) including:

 ■ A profile of the institutional resources, programs and services presently available in the community.

 ■ Present enrollments and participation rates (i.e., percent of group attending), and recent enrollment/participation trends.

 ■ Estimate of the capacity of each program if it is not being fully utilized.

 (See Box 4 for categories of information to describe each program area.)

c. Develop profile of present Jewish education personnel by drawing on available data. (Note: knowledge of educator strengths and needs will be enriched as returns on the educator's survey, discussed below, are compiled.)

 ■ Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood, camps counselors, JCC program staff, other informal education personnel) by institution/program

 ■ Employment status (full-time, part-time) and years of service (e.g. in current position, in Jewish education in community)

 ■ Qualifications, skills, expertise and background

 ■ Salary and benefit levels

Box 4: Elements of an Institution or Program Profile

- Organizational:
    - ○ type of institution, program (e.g., day school, camp, retreat center, etc.)
    - ○ denominational affiliation

- Students:
    - ○ enrollment and graduation trends
    - ○ age range

- Educators:
    - ○ numbers of full- and part-time
    - ○ areas of expertise
    - ○ qualifications
    - ○ turnover/retention rates

- Program components:
    - ○ subjects
    - ○ degree(s) offered
    - ○ in-service staff development
    - ○ activity duration
    - ○ methods
    - ○ support resources (e.g. library, training) and services

- Finances
    - ○ cost per unit of service
    - ○ revenue and expenditure trends
    - ○ major sources of revenue

---

d. Summarize community expenditure levels for major categories of services. E.g.:

- ■ Central agency
- ■ Day schools
- ■ Supplementary schools
- ■ JCC education services
- ■ Camps

2. Needs Analysis

A needs analysis identifies unserved and underserved needs for Jewish education. It will include:

- ■ Educator's survey

- Market analysis: selected client/consumer groups
- Assessment of quality

Educators' Survey

Given the critical importance of personnel in Jewish education and its centrality in the Lead Communities Project, an educators' survey should be an early and major component of the needs analysis. While the first round presentation of the community profile of Jewish education (see above) will compile presently available information on personnel, there are likely to be large gaps. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 5 contains ideas for areas to cover in a survey of Jewish education personnel. Adapting or building upon educator surveys undertaken in recent years by other communities is also recommended. Communities may contact CIJE for assistance in identifying useful prototypes.

Make sure to involve experienced social scientists, and educators from formal and informal settings in the design and implementation of the survey. Involving people from the field will improve the quality of the data elements selected, help avoid time and resource consuming efforts to obtain unavailable information, help pave the way when it comes time to collect data, and help mobilize educators to support the overall objectives of the commission.

Summarizing, the initial thinking about the educator's survey should take several factors into account:

- Purpose of the survey: E.g.
  - to provide detailed profile of personnel characteristics
  - to understand personnel strengths, weaknesses and needs (e.g. qualifications, turnover, shortage areas)
  - to establish a database for future comparisons

- Potential uses, outcomes. E.g.:
  - to identify in-services training needs
  - to understand the structure of employment (is most of the work force very much part-time, vocational, or avocational, reasonably well paid, or not)
  - to identify priorities for recruitment

- Categories of Information: What information is desired (see Box 4)

- Database: Allow for growth, in number of information fields as well as in number of records

- Involve educators from formal and informal settings

- Select survey director, or researcher with requisite expertise. In selecting staff, or

MEMORANDUM

To: Annette Hochstein
           Ginny Levi

From: Jim Meier

Date: February 4, 1993

Re: Attached draft of Planning Guide

Hope you had easy return flights.

The attached draft addresses your last round of edits (Wednesday, Feb 3) and includes new material on CIJE's role on pages 3, 4, 7, 10, 13, 18, 24, 32, and 35.
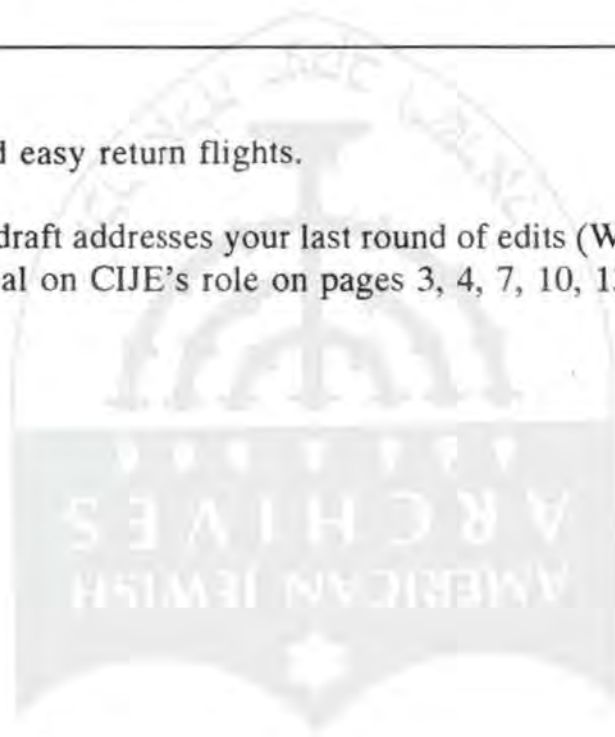
TABLE OF CONTENTS

LEAD COMMUNITIES PLANNING GUIDE

"Our goal should be to make it possible for every Jewish person, child or adult, to be exposed to the mystery and romance of Jewish history, to the enthralling insights and special sensitivities of Jewish thought, to the sanctity and symbolism of Jewish existence, and to the power and profundity of Jewish faith. As a motto and declaration of hope, we might adapt the dictum that says, 'They searched from Dan to Beer Sheva and did not find an am ha'aretz!' 'Am ha'aretz,' usually understood as an ignoramus, an illiterate, may for our purposes be redefined as one indifferent to Jewish visions and values, untouched by the drama and majesty of Jewish history, unappreciative of the resourcefulness and resilience of the Jewish community, and unconcerned with Jewish destiny. Education, in its broadest sense, will enable young people to confront the secret of Jewish tenacity and existence, the quality of Torah teaching which fascinates and attracts irresistibly. They will then be able, even eager, to find their place in a creative and constructive Jewish community."

Professor Isadore Twersky
A Time to Act, p. 19

"It is clear that there is a core of deeply committed Jews whose very way of life ensures meaningful Jewish continuity from generation to generation. However, there is a much larger segment of the Jewish population which is finding it increasingly difficult to define its future in terms of Jewish values and behavior. The responsibility for developing Jewish identity and instilling a commitment to Judaism for this population now rests primarily with education."

"Recent developments throughout the continent indicate that a climate exists today for bringing about major improvements. However, a massive program will have to be undertaken in order to revitalize Jewish education so that it is capable of performing a pivotal role in the meaningful continuity of the Jewish people."

A Time to Act, pp. 15 & 16

Atlanta, Baltimore, and Milwaukee have taken on an exciting challenge and an awesome responsibility: to dramatically improve Jewish education throughout their communities, and in the process, to serve as beacons in this endeavor for others in North America. These "lead communities" will provide a leadership function for others in communities throughout the continent. 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.

INTRODUCTION

This set of guidelines has the luxury and the challenge of preaching to the converted. Jewish communities understand and have been engaged in planning for a long time. The lead communities more than many others have made pioneering efforts in planning for Jewish education and continuity. Despite that advantage, all of us are acutely aware of the limitations in the available information and the magnitude of the task of setting out a plan that addresses the challenges of the Lead Communities Project.

The purposes of these guidelines are to:

■ offer approaches, methods, data collection instruments and other tools to use in the planning process, and

■ give some measure of uniformity to the planning process that each of the lead communities will engage in.

Each community will, of course, need to tailor these guidelines to its own circumstances.

As a general principle the object is to build upon the work and the research that has already been done in each community and use those as a point of departure for the Lead Communities Project. On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.

CIJE will serve as a resource and clearinghouse for lead communities as they proceed through the planning process: offering expertise, recommendations on methods or information collection instruments, linkages to national organizations, and a means by which the communities can share their approaches with each other.

I. FIRST STEPS

> *"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."*
>
> <u>A Time to Act</u>, p. 68

Rationale

First steps refer to preparations, to allow for smooth sailing once the serious work gets underway.

Major Activity Areas

There are two major areas for attention:

1. Initial mobilization of leadership (lay, educators, rabbis and professionals)
2. Introducing the idea into the community

Building a "wall-to-wall coalition" of all key actors in the community who have a stake in Jewish education is an important initial step of the Lead Communities Project. A widening net of stakeholder involvement in Jewish education is one of our instruments for engaging a larger portion of the Jewish community. The mobilization of leadership is a pivotal element for achieving that objective.

The first issue is to identify and recruit core leadership to spearhead the lead communities effort, while devising a structure that allows a broad cross-section of the community to become actively engaged in the project. The leadership therefore must be carefully selected (lead communities may want to contact CIJE staff or board members for help in recruiting key people), and the structure must allow ample opportunity for constituents to obtain a stake in the process. Box 1, Concentric Circles of Leadership, suggests a possible framework for organizing the project.

Tasks

1. Identify and recruit key leadership, including:

   ■ Chair

- Lay leaders
- Major donors
- Educators
- Rabbis
- Other professionals

2. Establish the Lead Community Commission, composed with representation that includes top leadership from each of these groups and that reflects the broad spectrum of the community. E.g., leadership from:

- Federation
- Formal educational settings
  - schools
  - synagogues
- Informal educational settings
  - JCCs
  - camps
- Communal agencies and organizations dealing with education

Box 1: Concentric Circles of Leadership

One way to organize to reconcile the dual objectives of strong and thoughtful leadership coupled with wide involvement is to develop expanding circles of leadership. For example:

• Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.

• Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.

• Task Forces, to address substantive issues and make recommendations to the full Commission, and/or to monitor and evaluate projects once they begin operations (see below.)

• Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

- Compile packets of background information and distribute to each of the committee members. Box 2 contains a selection of materials that may be useful for this purpose.

Box 2: Examples of Background Materials

• <u>A Time To Act</u>

• Previous planning documents, particularly on Jewish education or continuity, prepared by your community.

• Other studies and documents relating to the community's educational systems.

• Summary of most recent Jewish population study for your community.

• CIJE project descriptions

  o "Best Practices"

  o Monitoring, Evaluation and Feedback

  o Goals Project

3. Convene Commission

> ■ Establish a detailed timetable for the project by working backward from the year one end date, as well as forward based on the amount of time work components will require.
>
> Working with the chairperson of the committee, establish a schedule of committee meetings all the way through the first year of planning. Scan major Jewish and national holidays for conflicts. (See Box 3 for an illustrative schedule of steps.)
>
> ■ Prepare a tentative agenda for the first committee meeting to review with the chair.

Box 3: Illustrative Planning Framework

Phase	Deliverable	Commission Meeting Subject
1. Start-up	• Form Commission - Discuss the idea - Detailed workplan - Agree on mandate • Form committees	1a. Review of project key ideas, aims and structures 1b. Review of workplan: Key methods and projects - Best Practices - dealing with goals - Monitoring evaluation feedback project 1c. Develop charge to committees: main thrusts: - personnel - community mobilization
2. Start Self-study (ongoing)	• Design scheme • Profile of Jewish education: strengths and weaknesses • Survey of educators in the community • Report on findings	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	• Formulate issues	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	• Draft community mission statement	4. Approve mission/vision statement
5. Strategies and Priorities for Action	• List of recommendations for each major area (personnel, community mobilization, Israel experience) with priority rankings and priority sequencing	5. Recommendations on priorities
6. Programs	• Confer with CIJE, Best Practices • Draft guidelines • Define program priority areas and new initiatives • Issue call for program implementation proposals	6. Define program priorities
7. Resource Development	• Fundraising plan (e.g., potential donors, strategies, targets, CIJE assistance, timetable)	7. Approve and agree on assignments for carrying out plan.
8. Subsequent year action plan	• Draft budget with resource objectives • Compile summaries of program options • Prepare first year implementation plan	8a. Select programs for next year 8b. Approve overall implementation plan 8c. Set resources objectives ($)

4. Devise task force structure

It is helpful to organize task forces to address substantive issues and make recommendations to the full commission. Once pilot operations begin, the role of these committees can be modified to monitor and evaluate projects they have initiated.

There are several ways of organizing task forces. Here are some samples:

- Main thrusts of the recommendations of the Commission on Jewish Education in North America
  - personnel
  - community mobilization
  - research/self-study
  - Israel experience

- Delivery settings, e.g.:
  - day schools
  - supplementary schools
  - programs in informal settings

- Functional, the classic "Board of Directors" model, e.g.:
  - pilot projects
  - best practices
  - goals/visions of Jewish education
  - monitoring and evaluation
  - fundraising
  - coalition building and marketing/networking
  - educator's survey
  - five year planning

Issues to consider in deciding on the most effective approach for organizing include:

- Energizing: Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.

- Priorities: Do the topics represent articulated, or likely, priority areas of the Lead Communities Project.

- Content expertise: How do staff knowledge and other resource experts relate to the potential topics? Do any of the organizing approaches make better use of available human resources?

- Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.

The time and commitment of top lay leaders to serve as chairs, and the depth of capable professionals to service the task forces are factors to consider in deciding on the number of committees.

II. SELF-STUDY

> "[An important step in mobilizing is...] *to review the current state of Jewish education in its various aspects. This will provide the basis for analyzing the problems, considering the achievements and shortcomings, and determining where the most promising opportunities for improvement might lie.*"
>
> A Time to Act, p. 31

Rationale

Obtaining reliable information about something as complex as a community's educational system is an ongoing endeavor. Its payoffs are immediate, long-term, and continuous: as the community learns more about itself, its decision making will improve. Over time, the process will yield better and better quantitative and qualitative data about what exists in the community's Jewish education system, how good it is, what people in the community want, what more is needed and what works better.

Lead communities can offer leadership in this area too, developing means, methods and experience for an ongoing process of serious self-study. Hopefully, the tools developed in lead communities will be disseminated for other communities to adopt and adapt. CIJE is a resource for designing and carrying out the self-study, as well as for disseminating findings and new products.

The initial purpose of the self-study is to provide commission members with an increasingly solid foundation of information, to enlighten even the most knowledgeable insider, and to identify the critical issues and choices the commission may choose to address. It will also help move the community towards establishing standards of achievement that the community aspires to.

The self-study process is an ongoing one; it will not be completed within the first year of the project. It is proposed that during the first year of the project the self-study include the following 3 elements:

1. A *profile* of the Jewish education enterprise in the community, including the following:

   ■ Participation (absolute numbers, rates and trends)
   ■ Inventory of personnel, programs, institutions, organizations
   ■ Program resources
   ■ Financial resources

2. A *needs analysis* to focus during the first year on personnel-related issues, a central part of which will be an educator's survey.

3. A *follow-on agenda* for continuing analysis during years 2-5.

---

1. Profile

a. Develop demographic profile of Jewish education needs in the community.

■ Jewish population characteristics: cohort sizes (e.g., early childhood, school age lay leaders, adult education learners, college-age youth, other special groups, like mixed married couples)

b. Develop inventory of program capacities and participation rates (formal and informal programs) including:

■ A profile of the institutional resources, programs and services presently available in the community.

■ Present enrollments and participation rates (i.e., percent of group attending), and recent enrollment/participation trends.

■ Estimate of the capacity of each program if it is not being fully utilized.

(See Box 4 for categories of information to describe each program area.)

c. Develop profile of present Jewish education personnel by drawing on available data. (Note: knowledge of educator strengths and needs will be enriched as returns on the educator's survey, discussed below, are compiled.)

■ Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood, camps counselors, JCC program staff, other informal education personnel) by institution/program

■ Employment status (full-time, part-time) and years of service (e.g. in current position, in Jewish education in community)

■ Qualifications, skills, expertise and background

■ Salary and benefit levels

Box 4: Elements of an Institution or Program Profile

- Organizational:
  - type of institution, program (e.g., day school, camp, retreat center, etc.)
  - denominational affiliation

- Students:
  - enrollment and graduation trends
  - age range

- Educators:
  - numbers of full- and part-time
  - areas of expertise
  - qualifications
  - turnover/retention rates

- Program components:
  - subjects
  - degree(s) offered
  - in-service staff development
  - activity duration
  - methods
  - support resources (e.g. library, training) and services

- Finances
  - cost per unit of service
  - revenue and expenditure trends
  - major sources of revenue

---

d. Summarize community expenditure levels for major categories of services. E.g.:

- Central agency
- Day schools
- Supplementary schools
- JCC education services
- Camps

2. Needs Analysis

A needs analysis identifies unserved and underserved needs for Jewish education. It will include:

- Educator's survey

- Market analysis: selected client/consumer groups
- Assessment of quality

Educators' Survey

Given the critical importance of personnel in Jewish education and its centrality in the Lead Communities Project, an educators' survey should be an early and major component of the needs analysis. While the first round presentation of the community profile of Jewish education (see above) will compile presently available information on personnel, there are likely to be large gaps. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 5 contains ideas for areas to cover in a survey of Jewish education personnel. Adapting or building upon educator surveys undertaken in recent years by other communities is also recommended. Communities may contact CIJE for assistance in identifying useful prototypes.

Make sure to involve experienced social scientists, and educators from formal and informal settings in the design and implementation of the survey. Involving people from the field will improve the quality of the data elements selected, help avoid time and resource consuming efforts to obtain unavailable information, help pave the way when it comes time to collect data, and help mobilize educators to support the overall objectives of the commission.

Summarizing, the initial thinking about the educator's survey should take several factors into account:

- Purpose of the survey: E.g.
  - to provide detailed profile of personnel characteristics
  - to understand personnel strengths, weaknesses and needs (e.g. qualifications, turnover, shortage areas)
  - to establish a database for future comparisons

- Potential uses, outcomes. E.g.:
  - to identify in-services training needs
  - to understand the structure of employment (is most of the work force very much part-time, vocational, or avocational, reasonably well paid, or not)
  - to identify priorities for recruitment

- Categories of Information: What information is desired (see Box 4)

- Database: Allow for growth, in number of information fields as well as in number of records

- Involve educators from formal and informal settings

- Select survey director, or researcher with requisite expertise. In selecting staff, or

contracting with a researcher, thoroughly review assignments, expectations and workplans

In view of the importance, complexity, and ongoing nature of this aspect of the lead community effort, it may be advisable to convene a special task force (if such a task force was not built into the organizing framework) to oversee this phase of work.

Box 5: Educators' Survey: Possible Categories for Inventory (Illustrative only)

- Demographic profile (e.g., sex, age, marital status, address)

- Affiliation

- Jewish education background (e.g., degrees, licensure, courses and programs)

- In-service staff development (subjects, scope and level)

- Work history

- Jewish education work experience (e.g., years of experience, present and recent positions, full-time and part-time weekly hours; camp, other summer and other part-time jobs)

- Secular education positions

- Salary history, in Jewish education

- Inventory of formal and informal expertise (e.g., Judaic/Hebrew; age level specializations; teacher training, resource room management, special education; organizing, supervisory or administrative skills). Classifiable as:

  o Areas of knowledge
  o Skills
  o Special talents

- Attitudinal questions (e.g., Jewish education career intentions; job satisfaction and priority concerns)

Market Analysis

A market analysis attempts to quantify the unmet demand among different client groups for various Jewish education services/programs, and the potential pool of consumers who might participate if programs were made attractive enough to them.

Unmet demand, conceptually at least, is relatively straightforward: the difference between those who seek to participate in a program or service, and the available openings. Quantifying the potential pool is somewhat more complex. At the largest extreme it quantifies everyone in the consumer group, or cohort. The portion of the group likely to participate, however, will be affected by many factors, such as improvements in personnel and community mobilization -- the enabling options which are central to the success of this endeavor. Therefore, the market analysis should also seek insights on tactics to mobilize new segments of the community, and methods to recruit new people to participate in the enterprise of Jewish education.

Client Sub-groups: Jewish education takes place in formal and informal settings from infancy to grandparenting. There are no easy answers to the question of which (or whether any) sub-group or stage in life is the best one to start focusing attention and resources on. Therefore, with respect to potential client groups, two important issues should be articulated and addressed up-front:

1. Targeting: which client sub-group should be studied first?

2. Measures of Need: what is the appropriate definition of need?

Targeting: The first step is to select the key consumer groups, in addition to Jewish education professionals, to be the focus of research during the first round. One construct of categories from which to select client sub-groups is:

- Early childhood
- Ages 5-13
- Post Bar/Bat Mitzvah
- College age
- Parents of young children
- Singles
- Empty nesters
- Older adults

Given limited resources, it may make sense to fine tune the targeting still further by looking at specific age groups in particular program areas, for example, Israel programs for teens.

Box 6: Targeting

Several criteria can be applied in making decisions about what information or which groups to target in the needs analysis.

• **Present knowledge**: How much is already known about the topic or the needs of the group? Has the issue or group previously been studied? Are there significant open questions about what the needs are or how they should be addressed?

• **Priority**: How high a priority is the topic or sub-group with respect to Jewish education? Are the needs of this group for Jewish education a major issue or concern in the community?

• **Scope**: Is the scope of its impact (for example because of size or centrality) likely to be large?

• **Feasibility**: What resources of time, effort, money are needed to answer the open questions? For example, does available personnel have the expertise to design and carry out the study? Are data collection instruments available in the community or elsewhere that can be adapted?

Measures of Need: There are three conceptual ways of considering need:

a. "Market:" *Actual* demand by a defined set of people.

b. "Standard:" A measure of how much people require, or, from the community perspective, what is needed to realize a set of aspirations.

c. "Receptivity:" What people might *potentially* respond to, i.e. "buy", but cannot articulate because it is not within their past experience.

In designing the needs analysis, you must decide which measure or measures will be most useful for each subgroup. The CIJE's "Goals Project" and its "Best Practices" project may help reveal valuable insights which will help communities define appropriate measures. The criteria for targeting will be helpful in narrowing the measures as well (see also Box 6).

Measures of Resources: Potential "needs" should be compared to available resources to identify areas of unmet need or "gaps". At the most basic level, a profile of educational resources should include:

■ Data on the numbers of programs, by type, their capacities (in terms of openings, places) and actual enrollments

■ Data on numbers of personnel (reprise from profile or survey) qualified for different program types -- as a measure of shortages or capacity to serve more participants

■ Utilization of space

■ Levels of funding

■ Anticipated changes (including resources in the pipeline, such as new programs being planned or anticipated cutbacks)

Measures of Quality

Ideally, a profile of resources should also incorporate assessments of their *quality*. For example, while a community may appear to have enough supplementary school programs, the more crucial issue is how good are they?

The quality of programs is generally measured by assessment of levels of achievement, or measures of performance. The task in Jewish education is substantially more difficult because of the paucity of satisfactory tests of knowledge or achievement, and the complexity of defining a set of generally acceptable standards. For these reasons, in the short run at least it makes sense to rely on "surrogate" measures of performance. For example, attendance and longevity/dropout statistics can be enlightening as indicators of changes in student performance. At the same time, lead communities may spearhead efforts to develop more direct measures of student performance. In undertaking developmental work of this sort, communities may want to draw upon the expertise of national organizations (e.g., CAJE, CJF, CLAL, JESNA, JCCA) and national training institutions with whom CIJE has developed partnerships.

If enrollment or attendance is low, or dropoff at age 13 is high, is it because the prospective students are not out there, no effort is made to recruit, the programs are poorly designed or because effort is needed to increase parental support? Information on the quality and effectiveness of programs is important for identifying strengths and weaknesses of the existing system, for developing strategies for improvement, and ultimately for establishing a baseline against which the impact of future efforts can be measured.

Regardless, the difficult in measuring quality dictates that in this area especially several iterations of study are necessary. Findings and gaps uncovered in one round define the task for the next round, as the community's efforts to better evaluate, collect information and conduct surveys are implemented, and bear fruit.

Generally speaking, three types of measures can be used: (1) input, (2) output or performance, and (3) outcomes. See Box 8 for examples of measures to consider. If you find an absence of information on effectiveness -- that, in itself, may suggest that critical issues for the community will be: How should programs be evaluated and against what criteria? What are the characteristics of an excellent educational program? Should there be a process for setting community standards and "accrediting" programs? Should there be an effort to develop community-wide performance indicators and what should they be?

Box 8: Illustrative Measures of Quality and Effectiveness

• **Measures of inputs** are generally the easiest to obtain. Examples include: per capita expenditures for various age cohorts and programs, teacher/student ratios, average teacher salaries, per cent of teachers with advanced degrees, lay involvement, number of teachers participating in in-service training, curriculum units developed and introduced, increases/decreases in educator/participant contact hours, and etc. Comparisons can be made to provide perspective on where the community stands in relation to other communities and the nation on key indicators.

• Examples of **output or performance measures** include per cent of eligible population participating in formal and informal Jewish education by age group, levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, etc. Methods of collecting this information include sample surveys, questionnaires to program directors, focus groups (for satisfaction), self-studies by schools, alumni surveys, data collected by a central body such as the Board of Jewish Education or Federation, and information collected in recent Jewish population studies.

• **Outcomes** are the most difficult to measure. It is useful to articulate what these might be, even if the data is not available, because it will be helpful in developing the mission statement later on as well as for suggesting lines of future research. Examples of outcome measures would be self-definition and commitment to Jewish identity, values and practices; evidence of transmission of Jewishness to the next generation; affiliation with synagogues, communal organizations, support of Israel and Jewish institutions, etc.

Community Mobilization: Through the very process of moving forward as a lead community and of engaging in the market analysis, findings will surface about the strengths and shortcomings on the awareness, involvement and commitment of various sectors of the community about Jewish education programs and commission initiatives. Examples of areas of potential attention include:

■ Communication and collaboration between program professionals and rabbis

■ Involvement of teachers, educators in informal settings in articulating problems and solutions

■ The size (and growth) of the cadre of committed and supportive lay leaders, parents and/or donors

■ The presence (or absence) of regular publicity/information announcements about Jewish education programs, performances, or initiatives (e.g. columns in the local Jewish newspapers, community program catalogues, regular flyers, etc.)

These findings should be documented as part of the market analysis so that recommendations can be put forward to further mobilization of the community.

<u>Summary of Benchmarks/Tasks</u>

1. Design Needs Analysis

    a. <u>Focus:</u> Select the primary element, issue or program to be studied

    b. <u>Measures:</u> Decide on the method(s) for measuring the needs (see Box 8)

    c. <u>Develop Concept Scheme:</u> Layout decisions on design for discussion with commission

2. Collect Information: on present participation levels

3. Estimate Community Need/Demand

4. Gaps [3 minus 2]: a comparison of the market demand for the present programs will give an estimate of the unmet needs: who are the "unserved" or "underserved" groups in the community from the point of view of adult Jewish education?

5. Qualitative Analysis: compile findings on problems, and limitations on program quality or effectiveness and recommendations for improvement

6. Community Mobilization Impacts: compile findings and recommendations on recruitment and deeper involvement of students, personnel, leadership, parents and other stakeholders

Box 9: Methods

Defining Potential Markets: Four types of information can be used to identify the needs of user groups. As a rule, malleable methods should be employed because no single method will give a full picture of participation levels, and the quantitative and qualitative limitations in the programs available for different groups.

• Available demographic studies and data: enrollment trends, statistics on personnel involved in Jewish education and communal affairs (e.g., full-time, part-time, turnover, longevity ...), enrollment trends in local day and supplemental school programs (as a predictor of future personnel demands).

• Other national and local studies, commission and planning reports: such as the report of the Commission on Jewish Education in North America, local reports of task forces on Jewish continuity, and strategic planning reports that give insights on trends or external forces that will impact on needs. Experience in other cities can be analyzed for possible relevance. Opportunities for program modification or expansion will be identified where substantial unmet needs are documented and where new revenue opportunities appear to exist.

• Discussion or Focus groups: with selected consumer groups (such as day and supplementary school educators, synagogue lay leaders, students) to gain insights on access barriers as well as desires.

• Questionnaires: attitude surveys of selected sectors of the Jewish community: e.g. about student career interests; motivations for participating in specific program; views of institutional or program strengths or weaknesses; perceptions of their own needs or desires for Jewish education; and past and anticipated involvement in Jewish affairs.

Identify a variety of submarkets. Attempt to estimate the size of each submarket, the extent of the need and the competition.

3. Follow-on Agenda

Given the magnitude, complexity and the high stakes connected to developing the Lead Communities Project, self study should be on-going -- not a one-shot effort. Findings on one issue inevitably will raise more sophisticated questions. Moreover, limits on time and resources, information availability, and research capability dictate that the process be phased over a period of several years. The lead community will need to decide which parts of the self study to begin the first year, and which to postpone to later years.

Consequently, the objective should be to develop a design for years 2 through 5 for further data collection, in-depth studies in personnel, refinement of community mobilization efforts, and development of assessment instruments to better measure quality of formal and

informal Jewish education programs (for example, achievement measures to test knowledge of supplementary school students).

III. CRITICAL ISSUES

> *"The Jews of North America live in an open society that presents an unprecedented range of opportunities and choices. This extraordinary environment confronts us with what is proving to be an historic dilemma: while we cherish our freedom as individuals to explore new horizons, we recognize that this very freedom poses a dramatic challenge to the future of the Jewish way of life. The Jewish community must meet the challenge at a time when young people are not sure of their roots in the past or of their identity in the future. There is an urgent need to explore all possible ways to ensure that Jews maintain and strengthen the commitments that are central to Judaism."*

A Time to Act, p. 25-26

Rationale

In charting future directions, any community faces a number of important policy choices: i.e., critical issues. Early discussions of the planning committee are the first step in identifying the critical issues in personnel and community mobilization. Findings emerging through the on-going self study, including information on educators, areas of needs in mobilizing the community, and program strengths and weaknesses, will help sort out and clarify the fundamental decisions.

Deliverables:

- Explicit assumptions
- Formulation of critical issues
- Document summarizing consensus of committee on each critical issue

Benchmarks and Methods

1. Assumptions: In designing the best possible system for coordinating and supporting Jewish education, there will be several fundamental "givens" (e.g., overcoming shortages in qualified Jewish education personnel will require a systemic action in many areas, not just a single program). These assumptions should be made explicit to ensure agreement by the commission. Assumptions on which there is not consensus may well become "issues" which the committee must address (see Box 10 for sample assumptions).

Box 10: Sample Assumptions

---

1. Shortages in qualified Jewish education personnel will not be satisfactorily overcome until a series of systemic problems in the profession are addressed (e.g., salaries, training, career opportunities, empowerment in decision making) -- not just one element.

2. Talented young adults can be enticed to enter careers in Jewish education if major communal leaders (lay, rabbis, educators, professionals) take an <u>active</u> role in the recruitment process.

3. Significant levels of increased funding for Jewish education will not materialize if community leaders are not included early in the planning and decision on actions.

4. Jewish education has a more powerful impact on students when formal and informal experiences are linked.

5. The delivery system needs to offer an opportunity for balance (creative tension) between community-wide perspectives and the perspectives of the religious movements (Reform, Conservative, Reconstructionist and Orthodox).

---

2. <u>Critical Issues</u>: The most important choices on enabling options faced by the community must be defined and resolved in order to set priorities in Jewish education. The planning committee will attempt to reach agreement on what the important questions regarding personnel, community mobilization, and future investment in Jewish education throughout the community.

The selection of the critical choices is as important as the commission's decisions on their resolution. Omission of, or "papering over," a burning issue is likely to exacerbate future discord and confusion in the community. On the other hand, the omission may choose to table for the present a particular issue on which it is unable to achieve resolution. By this means it acknowledges recognition of an important problem and its intention to return to it.

Because the formulation of the critical issues is pivotal to the development of the mission and the rest of the planning process, you are urged to confer with CIJE and tap its resources. As with other parts of the process, CIJE will facilitate sharing experience with the other lead communities.

In defining and organizing choices, it may be useful to classify issues in cascading categories that proceed from more philosophic (i.e., mission) toward more operational (i.e., programmatic or organizational). (See Box 11 for types of issues.)

Box 11: Classification of Issues

1. Mission-level issues -- i.e. choices relating to the vision, philosophy and the role of the community in initiating or supporting the emerging needs.

2. Policy issues -- i.e. choices relating to the broad policies relevant to carrying out the community's mission. Some of these choices relate to professional development (e.g. the balance between in-service and pre-service training for pre-school teachers); recruitment (e.g. the balance between new entrants into the field, continuing education; re-training people from other fields); and community mobilization (e.g., the trade-offs between early action to create a sense of community support, versus the slower process of involvement of stakeholders in planning to build ownership).

3. Standards and Program Issues -- choices relating to the content and level of programming in Jewish education (e.g. what form of in-service training: mentoring program, workshops and course offerings, personalized growth plan for each educator, some of each, or what kind of staff development incentive plan: completion bonus, waived fees, contractual requirement).

4. Resource and organization Issues -- i.e. choices relating to the present or, more importantly, future capacity of the community to support mission and policies (e.g. the financial resources, agency roles, possible coordinative and integrative mechanisms). Stated differently, which actors, agents, or agencies will be/must be responsive to change on its Jewish education agenda.

IV. MISSION OR VISION STATEMENT

"Jewish education must find a way to transmit the essence of what Jewish life is all about, so that future generations of Jews will be impelled to search for meaning through their own rich traditions and institutions. Judaism must be presented as a living entity which gives the Jews of today the resources to find answers to the fundamental questions of life as readily as it did for our ancestors through the centuries."

A Time to Act, P. 27

Rationale

The heart of a strategic plan is a mission (or vision) statement, which should project a clear view of the aspirations of the community. The mission statement for the lead community should project a self-image of the community in relation to the enabling options for Jewish education. A good mission statement not only suggests what the community wants to accomplish but what it does not seek to accomplish; at the broadest level, it identifies whom it seeks to serve and how.

The mission statement is the result of a process that includes deliberation by and consultation with a broad cross section of the community -- lay leaders, scholars, rabbis, educators and communal professionals, parents and other stakeholders.

Deliverable

A concise mission statement.

Benchmarks and Methods

Because of its importance, and the difficulty of crafting a good one, the mission statement needs to be the product of substantial analysis and discussion; it should be prepared in the middle of the planning process, not at the beginning. The CIJE goals project may be of help to communities as they formulate missions.

It should represent the resolution of mission-level critical issues and frame a broad response to the needs assessment. Some parts of the mission statement are not likely to be very controversial; others might be. It is helpful to identify the major options in relation to each critical issue as a framework for the key discussion at which the mission statement gets formulated (see illustration in Box 12 below):

Box 12: Illustrative Mission/Options Chart			
CRITICAL ISSUES	OPTION A	OPTION B	OPTION C
1.0 Depth or breadth in near term (i.e. next 1-1/2 years) new programs for personnel	Resources should be targeted on one key group of Jewish educators, such as senior educators in schools and informal settings	Programs should be designed to impact on all categories more or less equally of Jewish educators	Every Jewish educator should some benefit from a new program, however, at least xx% of the total new resources should be targeted to a single group
2.0 Priority for leadership training recruitment	Senior leaders should be recruited	Promising young talent, future leaders, should be recruited	Placement in programs based on motivation and self selection, on a first come first served basis
3.0 Community posture on an Israel experience for young people	Community responsibility to insure that every young person has an Israel experience opportunity	Joint community-congregation-family responsibility to insure that every young person has an Israel experience opportunity	Community responsibility to insure that xx% of young people have an Israel experience opportunity

V. SETTING STRATEGIES AND PRIORITIES

"... the needs of education have seemed to be less urgent, less insistent, more diffused [than other issues]; *a problem that could be dealt with at some point in the future when more pressing problems have been solved. This is an illusion. ... we can no longer postpone addressing the needs of Jewish education, lest we face an irreversible decline in the vitality of the Jewish people."*

A Time to Act, p. 28

Rationale

The purpose of this part of the planning process is to insure that Jewish communal resources available for Jewish education are directed to the lead community's needs and mission. This is accomplished by selecting effective strategies or policies, and setting appropriate priorities.

The policies in the plan represent resolutions of the critical issues identified above. Resolution of an issue need not strictly adhere to the alternatives that were considered when the issue was defined. It may combine elements of several choices or be an alternative not previously thought of.

Establishing priorities for any community is extremely difficult: first, because of the large number of programmatic options it would be desirable to undertake to increase community support or to build the Jewish education profession (e.g., increase salaries, upgrade senior educators, recruit new talent, expand training programs, open a resource center, develop a mentoring program, etc.); and second, because of the multiplicity of constituencies, and their differing values. A particular educational service may be very important to one group and unimportant to another. The challenge is to develop an approach in which all important views are heard, and then strategies and priorities are developed to insure that the community does not scatter its limited resources.

"Priorities" are seen as judgments about relative importance that inform decisions about use of non-fiscal resources (such as leadership and staff of community agencies), resource development (such as foundation and endowment development), as well as dollar allocation decisions in the budgeting process.

Deliverables

- List of policy recommendations for the improvement of community mobilization

- Recommended priority rank and desirable sequence for each recommendation

- List of criteria used to select and rank policy recommendations

---

Benchmarks and Methods

Good methods of priority analysis inform and support human judgment, but do not try to supplant it; formulas or mechanical weighing or scoring methods are typically not useful.

Options are the items to be ranked in setting priorities for improving personnel and mobilizing the community. In other words, an "option" is a direction, service, or new initiative that is a potential recipient or user of a commission resource. An options structure is an organized, systematic listing of all the possible options. The decision as to what to list as an option is an absolutely crucial one; for once that decision is made, it defines what gets ranked in priority-setting.

A good structure for priority-setting should help decision makers connect broad concerns with specific services or programs -- both those that exist as well as those program or services that do not, but that reflect community concerns.

There are three sources of criteria relevant to setting priorities among options:

■   Criteria that are suggested by analyses of community needs in other areas. Other things being equal, one would tend to give priority to settings where the total needs are very large (e.g. personnel for supplementary schools) or where the gap between existing and needed services is the largest (e.g. in-service education).

■   Criteria that derive from the community's mission statement.

■   Criteria that derive from continental experience in planning for Jewish education. CIJE may be able to provide assistance in this area.

Sample criteria for the selection of effective strategies (policies) and priorities are illustrated in Box 13.

Box 13: Sample Criteria for Selecting Strategies and Priorities

• Supports professionalization of principals, teachers, and educators in informal settings -- including incentives for higher levels of education.

• Broadens lay leader involvement and support of Jewish education.

• Maximizes effective utilization of resources (minimize duplication).

• Maximizes the opportunity to integrate formal and informal educational techniques (e.g., family shabbatonim; camping + study programs; Israel study programs).

• Incorporates principles and methods that work, as documented by CIJE's "Best Practices" project.

VI. DESIGNING PROGRAMS/PILOT PROJECTS

"Jewish education must be compelling -- emotionally, intellectually, and spiritually -- so that Jews, young and old, will say to themselves: 'I have decided to remain engaged, to continue to investigate and grapple with these ideas, and to choose an appropriate way of life.' "

<div align="right">

A Time to Act, p. 26

</div>

Expanded, modified, and new programs of course are the most tangible part of the effort to improve Jewish education throughout the community. In the context of a lead community, they are important not just for the promise they hold to improve the enterprise, but also because they can serve as visible demonstrations that help attract larger circles of adherents.

The recent history of Jewish education, as with many other enterprises, contains instances of programs hastily put together to address frustrating problems. Here we hope to shift the emphasis toward the tried, proven and planned. "Best Practices," a CIJE project that is documenting successful programs throughout the continent and organizing them in a variety of categories, should be immensely helpful here. "Best Practice" programs are being classified in six areas:

- Supplementary schools
- Early childhood Jewish education
- JCCs
- Israel experience
- Day schools
- Jewish camping

The "Best Practices" project is now developing a method by which lead community planners and educators can learn from the best practices it has document 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 practice practitioners to lead communities; workshops with educators in lead communities, etc.

We envision programs being launched in two stages: first a few pilot projects to get started; and a subsequent series of programs reflecting the vision and priorities of the Commission.

Pilot Projects

A community may wish to launch a small number of pilot programs early in the process to begin getting results, to test ideas about which it has a reasonably high level of confidence of success, to gain visibility for its lead community project, and to mobilize the community and

---

create a sense of excitement. Programs selected as pilot should be ones which are likely to be consistent with long term directions, or likely to show results in a short period of time. Box 15 contains sample criteria for use in selecting pilot projects.

Selecting pilot projects that address high priority enabling options -- namely personnel and community mobilization -- is another way of helping to ensure the viability of the effort. Sample pilot programs are listed in Box 16.

Box 15: Sample Criteria for Pilot Project Selection

• Improves the profession (teachers, principals, and informal educators)

• High visibility -- likely to reinforce community mobilization efforts (e.g. catalyze stakeholder support)

• Maximizes the opportunity to replicate good results from other communities (e.g., via "Best Practices")

• Promotes multi-agency programming and cooperation

• Draws upon the resources and expertise of national training organizations (i.e., via CIJE partnerships)

• Can feasibly be implemented quickly

Box 16: Sample Ideas for Pilot Projects

Personnel

• In-service training for educational leadership -- school principals and JCC program directors.

• In-service training for 2 teachers and 2 informal educators from each institution.

• Summer seminar in Israel for selected educators

Community Mobilization

• Leadership training program for congregational and agency board members

• A series of public forums on the Lead Community idea, "Best Practices" and/or goals and visions for Jewish education

---

Commission Programs

A coherent set of programs should evolve from the commission process, reflecting the vision, strategies, priorities, and recommendations of the Commission. A refined set of criteria for program selection should also naturally evolve from those deliberations.

Program Selection: There are several methods for developing programs and working out program implementation details:

- Delegate responsibility for specific recommendations to agencies
- Empower task forces as part of commission deliberations.

Box 17 offers suggestions for developing program recommendations which, with some modifications, apply to each of the above selection approaches.

Box 17: Steps in Developing Program Recommendations

• Adapt commission criteria for evaluating ideas

• Develop list of promising program ideas: review "Best Practices" materials for promising programs, confer with CIJE, best practices sites, and/or national institutions

• Review most promising ideas for content, scope of impact, and quality

• Test assumptions: define questions and obtain answers

• Review with CIJE, national experts, and local users

• Detail program needs, operations and implementation

• Estimate costs

• Set priorities and phasing among program ideas

• Present priorities and justification to Commission
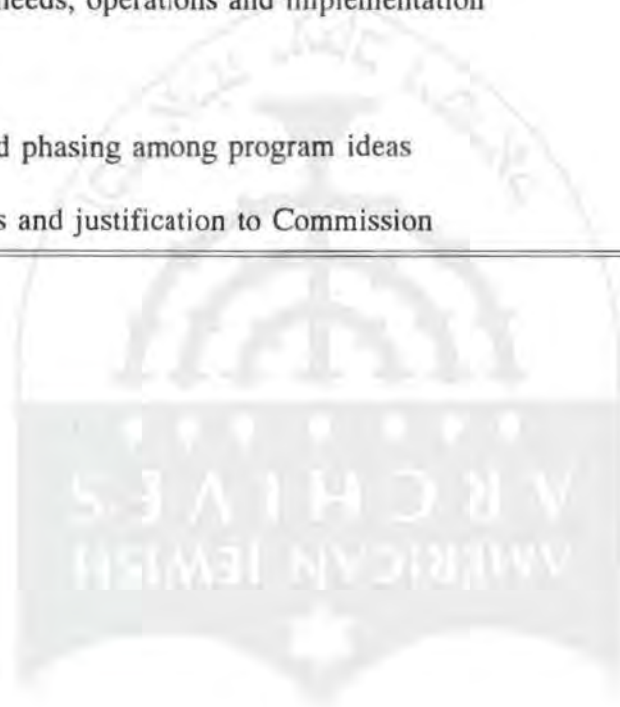
VII. FINANCIAL RESOURCE DEVELOPMENT

"... the environment in the Jewish community is not sufficiently supportive of the massive investment required to bring about systemic change. This affects the priority given to Jewish education, the status of the field of Jewish education and the level of funding that is granted."

<div align="right">

A Time to Act, p. 41

</div>

Lead communities will need to develop a short-term and a long-term strategy for obtaining funding to support Commission initiatives. Obvious potential categories include:

- Annual campaign allocations for local services (either increased amounts or reallocations)

- Creation or expansion of a fund for Jewish education

- Major donors

- Foundations (Jewish oriented, and possibly secular ones also)

Naturally, early on primary attention will focus on obtaining resources for start-up efforts. CIJE will assist lead communities by establishing and nurturing contacts between foundations interested in specific programmatic areas, and lead communities that are developing, modifying, or expanding their efforts in those areas.

We recommend that fundraising for this effort proceed in a planful way, much like the annual campaign:

1. Identify potential funders in different categories, e.g.:

    o Major donors
    o Medium/large donors
    o Family foundations
    o Community foundations
    o National foundations

2. Review strategies with CIJE

3. Match programs to funder interests

4. Identify person/team to make first contact. Consider enlisting Commission members for this role.

5. Follow-up, as appropriate.

UKELES ASSOCIATES INC.

611 Broadway, suite 505 · New York, NY 10012
tel (212) 260-8758 · fax (212) 260-8760

LAST DRAFT

~~FACSIMILE TRANSMITTAL SHEET~~

DATE: 2-2-93	
TO: Annette Hochstein c/o Windham Midtown	**FROM:** J. Meer
COMPANY:	**PAGES** (including cover): 2/a
FAX #: 404-870-1530	**FAX #:** (212) 260-8760

MESSAGE: Hold for arrival

If there is a problem with this transmission

please call _____ at (212) 260-8758.

TABLE OF CONTENTS

02·02·93

[draft: guide.06a   ~~02-01-93~~]

LEAD COMMUNITIES PLANNING GUIDE

"Our goal should be to make it possible for every Jewish person, child or adult, to be exposed to the mystery and romance of Jewish history, to the enthralling insights and special sensitivities of Jewish thought, to the sanctity and symbolism of Jewish existence, and to the power and profundity of Jewish faith. As a motto and declaration of hope, we might adapt the dictum that says, 'They searched from Dan to Beer Sheva and did not find an am ha'aretz!' 'Am ha'aretz,' usually understood as an ignoramus, an illiterate, may for our purposes be redefined as one indifferent to Jewish visions and values, untouched by the drama and majesty of Jewish history, unappreciative of the resourcefulness and resilience of the Jewish community, and unconcerned with Jewish destiny. Education, in its broadest sense, will enable young people to confront the secret of Jewish tenacity and existence, the quality of Torah teaching which fascinates and attracts irresistibly. They will then be able, even eager, to find their place in a creative and constructive Jewish community."

<div align="right">

A Time to Act, p. 19
Professor Isadore Twersky

</div>

"It is clear that there is a core of deeply committed Jews whose very way of life ensures meaningful Jewish continuity from generation to generation. However, there is a much larger segment of the Jewish population which is finding it increasingly difficult to define its future in terms of Jewish values and behavior. The responsibility for developing Jewish identity and instilling a commitment to Judaism for this population now rests primarily with education."

"Recent developments throughout the continent indicate that a climate exists today for bringing about major improvements. However, a massive program will have to be undertaken in order to revitalize Jewish education so that it is capable of performing a pivotal role in the meaningful continuity of the Jewish people."

A Time to Act, p. 15 & 16

Atlanta, Baltimore, and Milwaukee have taken on an exciting challenge and an awesome responsibility: to dramatically improve Jewish education throughout their communities, and in the process, to serve as beacons in this endeavor for others in North America. These "lead communities" will provide a leadership function for others in communities throughout the continent. 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.

INTRODUCTION

This set of guidelines has the luxury and the challenge of preaching to the converted. Jewish communities understand and have been engaged in planning for a long time. The lead communities more than many others have made pioneering efforts in planning for Jewish education and continuity. Despite that advantage, all of us are acutely aware of the limitations in the available information and the magnitude of the task of setting out a plan that addresses the challenges of the Lead Communities Project.

The purposes of these guidelines are to:

◼ offer approaches, methods, data collection instruments and other tools to use in the planning process, and

◼ give some measure of uniformity to the planning process that each of the lead communities will engage in.

Each community will, of course, need to tailor these guidelines to its own circumstances.

As a general principle the object is to build upon the work and the research that has already been done in each community and use those as a point of departure for the Lead Communities Project. On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.

1. FIRST STEPS

"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.~~" *Delete?*

<div align="right">

A Time to Act, p. 68

</div>

Rationale

First steps refer to preparations, to allow for smooth sailing once the serious work gets underway.

Major Activity Areas

There are two major areas for attention:

1. Initial mobilization of leadership (lay *(leaders)* educators, rabbis and professionals)
2. Introducing the idea into the community

Building a "wall-to-wall coalition" of all key actors in the community who have a stake in Jewish education is an important initial step of the Lead Communities Project. A widening net of stakeholder involvement in Jewish education is one of our instruments for engaging a larger portion of the Jewish community. The mobilization of leadership is a pivotal element for achieving that objective.

The first issue is to identify and recruit core leadership to spearhead the lead communities effort, while devising a structure that allows a broad cross-section of the community to become actively engaged in the project. The leadership therefore must be carefully selected, and the structure must allow ample opportunity for constituents to obtain a stake in the process. Box 1, Concentric Circles of Leadership, suggests a possible framework for organizing the project.

Tasks

1. Identify and recruit key leadership, including:

    - Chair
    - Lay leaders
    - Major donors

- Educators
- Rabbis
- Other professionals

2. Establish the Lead Community Commission, composed with representation that includes top leadership from each of these groups and that reflects the broad spectrum of the community. E.g., leadership from:

- Federation
- Formal educational settings
    - schools
    - synagogues
- Informal educational settings
    - JCCs
    - camps
- Communal agencies and organizations dealing with education

Box 1: Concentric Circles of Leadership

One way to organize to reconcile the dual objectives of strong and thoughtful leadership coupled with wide involvement is to develop expanding circles of leadership. For example:

- Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.

- Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.

- Task Forces, to address substantive issues and make recommendations to the full Commission, and/or to monitor and evaluate projects once they begin operations (see below.)

- Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

- Compile packets of background information and distribute to each of the committee members. Box 2 contains a selection of materials that may be useful for this purpose.

Box 2: Examples of Background Materials

- A Time To Act

- Previous planning documents, particularly on Jewish education or continuity, prepared by your community.

- Other studies and documents relating to the community's educational systems.

- Summary of most recent Jewish population study for your community.

- CIJE project descriptions

  o "Best Practices"

  o Monitoring, Evaluation and Feedback

  o Goals Project

---

3. Convene Commission

   ▣ Establish a detailed timetable for the project by working backward from the year one end date, as well as forward based on the amount of time work components will require.

   Working with the chairperson of the committee, establish a schedule of committee meetings all the way through the first year of planning. Scan major Jewish and national holidays for conflicts. (See Box 3 for an illustrative schedule of steps.)

   ▣ Prepare a tentative agenda for the first committee meeting to review with the chair.

Box 3: Illustrative Planning Framework

Phase	Deliverable	Commission Meeting Subject
1. Start-up	• Form Commission - Discuss the idea - Detailed workplan - Agree on mandate • Form committees	1a. Aims and structures of the Lead Communities Project in our community - CIJE and Lead Community Commission 1b. Review of workplan: Key methods and projects - Best Practices - dealing with goals - Monitoring evaluation feedback project 1c. Develop charge to committees: main thrusts: - personnel - community mobilization
2. Start Self-study (ongoing)	• Design scheme • Profile of Jewish education: strengths and weaknesses • Survey of educators in the community • Report on findings	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	• Formulate issues	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	• Draft community mission statement	4. Approve mission/vision statement
5. Strategies and Priorities for Action	• List of recommendations for each major area (personnel/community mobilization, Israel experience) with priority rankings and priority sequencing	5. Recommendations on priorities
6. Programs	• Draft guidelines • Define program priority areas and new initiatives • Issue call for program proposals	6. Define program priorities
7. Resource Development	• Fundraising plan (e.g., potential donors, strategies, targets, timetable)	7. Approve and agree on assignments for carrying out plan.
8. First year action plan (1993-4)	• Draft budget with resource objectives • Compile summaries of program options • Prepare first year implementation plan	8a. Select programs for next year 8b. Approve overall implementation plan 8c. Set resources objectives ($)

4. Devise task force structure

It is helpful to organize task forces to address substantive issues and make recommendations to the full commission. Once pilot operations begin, the role of these committees can be modified to monitor and evaluate projects they have initiated.

There are several ways of organizing task forces. Here are some samples:

- Main thrusts of the recommendations of the Commission on Jewish Education in North America
  - personnel
  - community mobilization
  - research/self-study
  - Israel experience

- Delivery settings, e.g.:
  - day schools
  - supplementary schools
  - programs in informal settings

- Functional, the classic "Board of Directors" model, e.g.:
  - pilot projects
  - best practices
  - goals/visions of Jewish education
  - monitoring and evaluation
  - fundraising
  - coalition building and marketing/networking
  - educator's survey
  - five year planning

Issues to consider in deciding on the most effective approach for organizing include:

- Priorities: Do the topics represent articulated, or likely, priority areas of the Lead Communities Project.

- Content expertise: How do staff knowledge and other resource experts relate to the potential topics? Do any of the organizing approaches align better than others with available human resources?

- Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.

- Energizing: Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.

The time and commitment of top lay leaders to serve as chairs, and the depth of capable professionals to service the task forces are factors to consider in deciding on the number of committees.

II. SELF-STUDY

> "[An important step in mobilizing is...] *to review the current state of Jewish education in its various aspects. This will provide the basis for analyzing the problems, considering the achievements and shortcomings, and determining where the most promising opportunities for improvement might lie.*"

A Time to Act, p. 31

Rationale

Obtaining reliable information about something as complex as a community's educational system is an ongoing endeavor. Its payoffs are immediate, long-term, and continuous: as the community learns more about itself, its decision making will improve. Over time, the process will yield better and better quantitative and qualitative data about what exists in the community's Jewish education system, how good it is, what people in the community want, what more is needed and what works better.

Lead communities can offer leadership in this area too, developing means, methods and experience for an ongoing process of serious self-study. Hopefully, the tools developed in lead communities will be disseminated for other communities to adopt and adapt.

The initial purpose of the self-study is to provide commission members with an increasingly solid foundation of information, to enlighten even the most knowledgeable insider, and to identify the critical issues and choices the commission may choose to address. It will also help move the community towards establishing standards of achievement that the community aspires to.

The self-study process is an ongoing one; it will not be completed within the first year of the project. It is proposed that during the first year of the project the self-study include the following 3 elements:

1. A *profile* of the Jewish education enterprise in the community, including the following:

   - Participation (absolute numbers, rates and trends)
   - Inventory of personnel, programs, institutions, organizations
   - Program resources
   - Financial resources

2. A *needs analysis* to focus during the first year on personnel-related issues, a central part of which will be an educator's survey.

3. A *follow-on agenda* for continuing analysis during years 2-5.

1. Profile

a. Develop demographic profile of Jewish education needs in the community.

■ Jewish population characteristics: cohort sizes (e.g., early childhood, school age lay leaders, adult education learners, college-age youth, other special groups, like mixed married couples)

b. Develop inventory of program capacities and participation rates (formal and informal programs, by institution/program)

■ Develop a profile of the institutional resources, programs and services presently available in the community. Estimate the capacity of these programs if they are not being fully utilized. (See Box 4 for categories of information to describe each program area.)

c. Develop profile of present Jewish education personnel by drawing on available data. (Note: knowledge of educator strengths and needs will be enriched as returns on the educator's survey, discussed below, are compiled.)

■ Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood, camps counselors, JCC program staff, other informal education personnel) by institution/program

■ Employment status (full-time, part-time) and years of service (e.g. in current position, in Jewish education in community)

■ Qualifications, skills, expertise and background

■ Salary and benefit levels

Box 4: Elements of an Institution or Program Profile

- Students:
  - enrollment and graduation trends
  - age range

- Educators:
  - numbers of full- and part-time
  - areas of expertise
  - qualifications
  - turnover/retention rates

- Program components:
  - subjects
  - degree(s) offered
  - in-service staff development
  - activity duration
  - methods
  - support resources (e.g. library, training) and services

- Finances
  - cost per unit of service
  - revenue and expenditure trends
  - major sources of revenue

organizational affiliation?

---

d. Summarize community expenditure levels for major categories of services. E.g.:

- Central agency
- Day schools
- Supplementary schools
- JCC education services
- Camps

2. **Needs Analysis**

A needs analysis identifies unserved and underserved needs for Jewish education. It will include:

- Educator's survey
- Market analysis: selected client/consumer groups
- Assessment of quality

Educators' Survey

Given the critical importance of personnel in Jewish education and its centrality in the Lead Communities Project, an educators' survey should be an early and major component of the needs analysis. While the first round presentation of the community profile of Jewish education (see above) will compile presently available information on personnel, there are likely to be large gaps. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 5 contains ideas for areas to cover in a survey of Jewish education personnel. Adapting or building upon educator surveys undertaken in recent years by other communities is also recommended.

Make sure to involve experienced social scientists, and educators from formal and informal settings in the design and implementation of the survey. Involving people from the field will improve the quality of the data elements selected, help avoid time and resource consuming efforts to obtain unavailable information, help pave the way when it comes time to collect data, and help mobilize educators to support the overall objectives of the commission.

Summarizing, the initial thinking about the educator's survey should take several factors into account:

- Purpose of the survey: E.g.
  - to provide detailed profile of personnel characteristics
  - to understand personnel strengths, weaknesses and needs (e.g. qualifications, turnover, shortage areas)
  - to establish a database for future comparisons

- Potential uses, outcomes. E.g.:
  - to identify in-services training needs
  - to understand the structure of employment (is most of the work force very much part-time, vocational, or avocational, reasonably well paid, or not)
  - to identify priorities for recruitment

- Categories of Information: What information is desired (see Box 4)

- Database: Allow for growth, in number of information fields as well as in number of records

- Involve educators from formal and informal settings

- Select survey director, or researcher with requisite expertise. In selecting staff, or contracting with a researcher, thoroughly review assignments, expectations and workplans

In view of the importance, complexity, and ongoing nature of this aspect of the lead community effort, it may be advisable to convene a special task force (if such a task force was not built into the organizing framework) to oversee this phase of work.

Box 5: Educators' Survey: Possible Categories for Inventory (Illustrative only)

- Demographic profile (e.g., sex, age, marital status, address)

- Affiliation

- Jewish education background (e.g., degrees, licensure, courses and programs)

- In-service staff development (subjects, scope and level)

- Work history

- Jewish education work experience (e.g., years of experience, present and recent positions, full-time and part-time weekly hours; camp, other summer and other part-time jobs)

- Secular education positions

- Salary history, in Jewish education

- Inventory of formal and informal expertise (e.g., Judaic/Hebrew; age level specializations; teacher training, resource room management, special education; organizing, supervisory or administrative skills). Classifiable as:

  - Areas of knowledge
  - Skills
  - Special talents

- Attitudinal questions (e.g., Jewish education career intentions; job satisfaction and priority concerns)

Market Analysis

A market analysis attempts to quantify the unmet demand among different client groups for various Jewish education services/programs, and the potential pool of consumers who might participate if programs were made attractive enough to them.

Unmet demand, conceptually at least, is relatively straightforward: the difference between those who seek to participate in a program or service, and the available openings. Quantifying the potential pool is somewhat more complex. At the largest extreme it quantifies everyone in the consumer group, or cohort. The portion of the group likely to participate, however, will be affected by many factors, such as improvements in personnel and community mobilization -- the enabling options which are central to the success of this endeavor. Therefore, the market analysis

UKELES ASSOCIATES INC.

611 Broadway, suite 505 · New York, NY 10012

tel (212) 260-8758 · fax (212) 260-8760

LAST DRAFT

~~FACSIMILE TRANSMITTAL SHEET~~

	DATE: 2-2-93
TO: Annette Hochstein c/o Windham Midtown	FROM: J. Meer
COMPANY:	PAGES (including cover): 2/a
FAX #: 404-870-1530	FAX #: (212) 260-8760

MESSAGE: Hold for arrival

If there is a problem with this transmission

please call _____ at (212) 260-8758.

TABLE OF CONTENTS

LEAD COMMUNITIES PLANNING GUIDE

"Our goal should be to make it possible for every Jewish person, child or adult, to be exposed to the mystery and romance of Jewish history, to the enthralling insights and special sensitivities of Jewish thought, to the sanctity and symbolism of Jewish existence, and to the power and profundity of Jewish faith. As a motto and declaration of hope, we might adapt the dictum that says, 'They searched from Dan to Beer Sheva and did not find an am ha'aretz!' 'Am ha'aretz,' usually understood as an ignoramus, an illiterate, may for our purposes be redefined as one indifferent to Jewish visions and values, untouched by the drama and majesty of Jewish history, unappreciative of the resourcefulness and resilience of the Jewish community, and unconcerned with Jewish destiny. Education, in its broadest sense, will enable young people to confront the secret of Jewish tenacity and existence, the quality of Torah teaching which fascinates and attracts irresistibly. They will then be able, even eager, to find their place in a creative and constructive Jewish community."

<div style="text-align: right">

A Time to Act, p. 19
Professor Isadore Twersky

</div>

"It is clear that there is a core of deeply committed Jews whose very way of life ensures meaningful Jewish continuity from generation to generation. However, there is a much larger segment of the Jewish population which is finding it increasingly difficult to define its future in terms of Jewish values and behavior. The responsibility for developing Jewish identity and instilling a commitment to Judaism for this population now rests primarily with education."

"Recent developments throughout the continent indicate that a climate exists today for bringing about major improvements. However, a massive program will have to be undertaken in order to revitalize Jewish education so that it is capable of performing a pivotal role in the meaningful continuity of the Jewish people."

<u>A Time to Act</u>, p. 15 & 16

Atlanta, Baltimore, and Milwaukee have taken on an exciting challenge and an awesome responsibility: to dramatically improve Jewish education throughout their communities, and in the process, to serve as beacons in this endeavor for others in North America. These "lead communities" will provide a leadership function for others in communities throughout the continent. 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.

INTRODUCTION

This set of guidelines has the luxury and the challenge of preaching to the converted. Jewish communities understand and have been engaged in planning for a long time. The lead communities more than many others have made pioneering efforts in planning for Jewish education and continuity. Despite that advantage, all of us are acutely aware of the limitations in the available information and the magnitude of the task of setting out a plan that addresses the challenges of the Lead Communities Project.

The purposes of these guidelines are to:

■ offer approaches, methods, data collection instruments and other tools to use in the planning process, and

■ give some measure of uniformity to the planning process that each of the lead communities will engage in.

Each community will, of course, need to tailor these guidelines to its own circumstances.

As a general principle the object is to build upon the work and the research that has already been done in each community and use those as a point of departure for the Lead Communities Project. On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.

1. FIRST STEPS

> *"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.~~* *Delete?*

<div align="right">

A Time to Act, p. 68

</div>

Rationale

First steps refer to preparations, to allow for smooth sailing once the serious work gets underway.

Major Activity Areas

There are two major areas for attention:

1. Initial mobilization of leadership (lay *(leaders)* educators, rabbis and professionals)
2. Introducing the idea into the community

Building a "wall-to-wall coalition" of all key actors in the community who have a stake in Jewish education is an important initial step of the Lead Communities Project. A widening net of stakeholder involvement in Jewish education is one of our instruments for engaging a larger portion of the Jewish community. The mobilization of leadership is a pivotal element for achieving that objective.

The first issue is to identify and recruit core leadership to spearhead the lead communities effort, while devising a structure that allows a broad cross-section of the community to become actively engaged in the project. The leadership therefore must be carefully selected, and the structure must allow ample opportunity for constituents to obtain a stake in the process. Box 1, Concentric Circles of Leadership, suggests a possible framework for organizing the project.

Tasks

1. Identify and recruit key leadership, including:

   ■ Chair
   ■ Lay leaders
   ■ Major donors

- Educators
- Rabbis
- Other professionals

2. Establish the Lead Community Commission, composed with representation that includes top leadership from each of these groups and that reflects the broad spectrum of the community. E.g., leadership from:

- Federation
- Formal educational settings
  - schools
  - synagogues
- Informal educational settings
  - JCCs
  - camps
- Communal agencies and organizations dealing with education

Box 1: Concentric Circles of Leadership

One way to organize to reconcile the dual objectives of strong and thoughtful leadership coupled with wide involvement is to develop expanding circles of leadership. For example:

- Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.

- Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.

- Task Forces, to address substantive issues and make recommendations to the full Commission, and/or to monitor and evaluate projects once they begin operations (see below.)

- Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

- Compile packets of background information and distribute to each of the committee members. Box 2 contains a selection of materials that may be useful for this purpose.

```
Box 2:  Examples of Background Materials
```

- A Time To Act

- Previous planning documents, particularly on Jewish education or continuity, prepared by your community.

- Other studies and documents relating to the community's educational systems.

- Summary of most recent Jewish population study for your community.

- CIJE project descriptions

  o "Best Practices"

  o Monitoring, Evaluation and Feedback

  o Goals Project

3. Convene Commission

   ▣ Establish a detailed timetable for the project by working backward from the year one end date, as well as forward based on the amount of time work components will require.

   Working with the chairperson of the committee, establish a schedule of committee meetings all the way through the first year of planning. Scan major Jewish and national holidays for conflicts. (See Box 3 for an illustrative schedule of steps.)

   ▣ Prepare a tentative agenda for the first committee meeting to review with the chair.

Box 3: Illustrative Planning Framework

Phase	Deliverable	Commission Meeting Subject
1. Start-up	• Form Commission - Discuss the idea - Detailed workplan - Agree on mandate • Form committees	1a. Aims and structures of the Lead Communities Project in our community - CIJE and Lead Community Commission 1b. Review of workplan: Key methods and projects - Best Practices - dealing with goals - Monitoring evaluation feedback project 1c. Develop charge to committees: main thrusts: - personnel - community mobilization
2. Start Self-study (ongoing)	• Design scheme • Profile of Jewish education: strengths and weaknesses • Survey of educators in the community • Report on findings	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	• Formulate issues	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	• Draft community mission statement	4. Approve mission/vision statement
5. Strategies and Priorities for Action	• List of recommendations for each major area (personnel, community mobilization, Israel experience) with priority rankings and priority sequencing	5. Recommendations on priorities
6. Programs	• Draft guidelines • Define program priority areas and new initiatives • Issue call for program proposals	6. Define program priorities
7. Resource Development	• Fundraising plan (e.g., potential donors, strategies, targets, timetable)	7. Approve and agree on assignments for carrying out plan.
8. First year action plan (1993-4)	• Draft budget with resource objectives • Compile summaries of program options • Prepare first year implementation plan	8a. Select programs for next year 8b. Approve overall implementation plan 8c. Set resources objectives ($)

4. Devise task force structure

It is helpful to organize task forces to address substantive issues and make recommendations to the full commission. Once pilot operations begin, the role of these committees can be modified to monitor and evaluate projects they have initiated.

There are several ways of organizing task forces. Here are some samples:

- Main thrusts of the recommendations of the Commission on Jewish Education in North America
  - personnel
  - community mobilization
  - research/self-study
  - Israel experience

- Delivery settings, e.g.:
  - day schools
  - supplementary schools
  - programs in informal settings

- Functional, the classic "Board of Directors" model, e.g.:
  - pilot projects
  - best practices
  - goals/visions of Jewish education
  - monitoring and evaluation
  - fundraising
  - coalition building and marketing/networking
  - educator's survey
  - five year planning

Issues to consider in deciding on the most effective approach for organizing include:

- Priorities: Do the topics represent articulated, or likely, priority areas of the Lead Communities Project.

- Content expertise: How do staff knowledge and other resource experts relate to the potential topics? Do any of the organizing approaches align better than others with available human resources?

- Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.

- Energizing: Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.

The time and commitment of top lay leaders to serve as chairs, and the depth of capable professionals to service the task forces are factors to consider in deciding on the number of committees.

II. SELF-STUDY

> "[An important step in mobilizing is...] *to review the current state of Jewish education in its various aspects. This will provide the basis for analyzing the problems, considering the achievements and shortcomings, and determining where the most promising opportunities for improvement might lie.*"

<div align="right">A Time to Act, p. 31</div>

Rationale

Obtaining reliable information about something as complex as a community's educational system is an ongoing endeavor. Its payoffs are immediate, long-term, and continuous: as the community learns more about itself, its decision making will improve. Over time, the process will yield better and better quantitative and qualitative data about what exists in the community's Jewish education system, how good it is, what people in the community want, what more is needed and what works better.

Lead communities can offer leadership in this area too, developing means, methods and experience for an ongoing process of serious self-study. Hopefully, the tools developed in lead communities will be disseminated for other communities to adopt and adapt.

The initial purpose of the self-study is to provide commission members with an increasingly solid foundation of information, to enlighten even the most knowledgeable insider, and to identify the critical issues and choices the commission may choose to address. It will also help move the community towards establishing standards of achievement that the community aspires to.

The self-study process is an ongoing one; it will not be completed within the first year of the project. It is proposed that during the first year of the project the self-study include the following 3 elements:

1. A *profile* of the Jewish education enterprise in the community, including the following:

   - Participation (absolute numbers, rates and trends)
   - Inventory of personnel, programs, institutions, organizations
   - Program resources
   - Financial resources

2. A *needs analysis* to focus during the first year on personnel-related issues, a central part of which will be an educator's survey.

3. A *follow-on agenda* for continuing analysis during years 2-5.

1. Profile

a. Develop demographic profile of Jewish education needs in the community.

> ■ Jewish population characteristics: cohort sizes (e.g., early childhood, school age lay leaders, adult education learners, college-age youth, other special groups, like mixed married couples)

b. Develop inventory of program capacities and participation rates (formal and informal programs, by institution/program)

> ■ Develop a profile of the institutional resources, programs and services presently available in the community. Estimate the capacity of these programs if they are not being fully utilized. (See Box 4 for categories of information to describe each program area.)

c. Develop profile of present Jewish education personnel by drawing on available data. (Note: knowledge of educator strengths and needs will be enriched as returns on the educator's survey, discussed below, are compiled.)

> ■ Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood, camps counselors, JCC program staff, other informal education personnel) by institution/program

> ■ Employment status (full-time, part-time) and years of service (e.g. in current position, in Jewish education in community)

> ■ Qualifications, skills, expertise and background

> ■ Salary and benefit levels

```
┌─────────────────────────────────────────────────────────────┐
│ Box 4:  Elements of an Institution or Program Profile         │
├─────────────────────────────────────────────────────────────┤
│ • Students:                                                   │
│     O  enrollment and graduation trends                       │
│     O  age range                                              │
│                                                               │
│ • Educators:                                                  │
│     O  numbers of full- and part-time                         │
│     O  areas of expertise                                     │
│     O  qualifications                                         │
│     O  turnover/retention rates                               │
│                                                               │
│ • Program components:                                         │
│     O  subjects                                               │
│     O  degree(s) offered                                      │
│     O   in-service staff development                          │
│     O  activity duration                                      │
│     O  methods                                                │
│     O  support resources (e.g. library, training) and services│
│                                                               │
│ • Finances                                                    │
│     O  cost per unit of service                               │
│     O  revenue and expenditure trends                         │
│     O   major sources of revenue                              │
└─────────────────────────────────────────────────────────────┘
```

d. Summarize community expenditure levels for major categories of services. E.g.:

  - Central agency
  - Day schools
  - Supplementary schools
  - JCC education services
  - Camps

2. Needs Analysis

A needs analysis identifies unserved and underserved needs for Jewish education. It will include:

  - Educator's survey
  - Market analysis: selected client/consumer groups
  - Assessment of quality

Educators' Survey

Given the critical importance of personnel in Jewish education and its centrality in the Lead Communities Project, an educators' survey should be an early and major component of the needs analysis. While the first round presentation of the community profile of Jewish education (see above) will compile presently available information on personnel, there are likely to be large gaps. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 5 contains ideas for areas to cover in a survey of Jewish education personnel. Adapting or building upon educator surveys undertaken in recent years by other communities is also recommended.

Make sure to involve experienced social scientists, and educators from formal and informal settings in the design and implementation of the survey. Involving people from the field will improve the quality of the data elements selected, help avoid time and resource consuming efforts to obtain unavailable information, help pave the way when it comes time to collect data, and help mobilize educators to support the overall objectives of the commission.

Summarizing, the initial thinking about the educator's survey should take several factors into account:

- Purpose of the survey: E.g.
  - to provide detailed profile of personnel characteristics
  - to understand personnel strengths, weaknesses and needs (e.g. qualifications, turnover, shortage areas)
  - to establish a database for future comparisons

- Potential uses, outcomes. E.g.:
  - to identify in-services training needs
  - to understand the structure of employment (is most of the work force very much part-time, vocational, or avocational, reasonably well paid, or not)
  - to identify priorities for recruitment

- Categories of Information: What information is desired (see Box 4)

- Database: Allow for growth, in number of information fields as well as in number of records

- Involve educators from formal and informal settings

- Select survey director, or researcher with requisite expertise. In selecting staff, or contracting with a researcher, thoroughly review assignments, expectations and workplans

In view of the importance, complexity, and ongoing nature of this aspect of the lead community effort, it may be advisable to convene a special task force (if such a task force was not built into the organizing framework) to oversee this phase of work.

Box 5: Educators' Survey: Possible Categories for Inventory (Illustrative only)

• Demographic profile (e.g., sex, age, marital status, address)

• Affiliation

• Jewish education background (e.g., degrees, licensure, courses and programs)

• In-service staff development (subjects, scope and level)

• Work history

• Jewish education work experience (e.g., years of experience, present and recent positions, full-time and part-time weekly hours; camp, other summer and other part-time jobs)

• Secular education positions

• Salary history, in Jewish education

• Inventory of formal and informal expertise (e.g., Judaic/Hebrew; age level specializations; teacher training, resource room management, special education; organizing, supervisory or administrative skills). Classifiable as:

   o Areas of knowledge
   o Skills
   o Special talents

• Attitudinal questions (e.g., Jewish education career intentions; job satisfaction and priority concerns)

Market Analysis

A market analysis attempts to quantify the unmet demand among different client groups for various Jewish education services/programs, and the potential pool of consumers who might participate if programs were made attractive enough to them.

Unmet demand, conceptually at least, is relatively straightforward: the difference between those who seek to participate in a program or service, and the available openings. Quantifying the potential pool is somewhat more complex. At the largest extreme it quantifies everyone in the consumer group, or cohort. The portion of the group likely to participate, however, will be affected by many factors, such as improvements in personnel and community mobilization -- the enabling options which are central to the success of this endeavor. Therefore, the market analysis

---

should also seek insights on tactics to mobilize new segments of the community, and methods to recruit new people to participate in the enterprise of Jewish education.

Client Sub-groups: Jewish education takes place in formal and informal settings from infancy to grandparenting. There are no easy answers to the question of which (or whether any) sub-group or stage in life is the best one to start focusing attention and resources on. Therefore, with respect to potential client groups, two important issues should be articulated and addressed up-front:

1. Targeting: which client sub-group should be studied first?

2. Measures of Need: what is the appropriate definition of need?

Targeting: The first step is to select the key consumer groups, in addition to Jewish education professionals, to be the focus of research during the first round. One construct of categories from which to select client sub-groups is:

- Early childhood
- Ages 5-13
- Post Bar/Bat Mitzvah
- College age
- Parents of young children
- Singles
- Empty nesters
- Older adults

Given limited resources, it may make sense to fine tune the targeting still further by looking at specific age groups in particular program areas, for example, Israel programs for teens.

- **Priority**: How high a priority is the topic or sub-group with respect to Jewish education? Are the needs of this group for Jewish education a major issue or concern in the community?

- **Scope**: Is the scope of its impact (for example because of size or centrality) likely to be large?

- **Feasibility**: What resources of time, effort, money are needed to answer the open questions? For example, does available personnel have the expertise to design and carry out the study? Are data collection instruments available in the community or elsewhere that can be adapted?

Measures of Need: There are three conceptual ways of considering need:

a. "Market:" *Actual* demand by a defined set of people.

b. "Standard:" A measure of how much people require, or, from the community perspective, what is needed to realize a set of aspirations.

c. "Receptivity:" What people might *potentially* respond to, i.e. "buy", but cannot articulate because it is not within their past experience.

In designing the needs analysis, you must decide which measure or measures will be most useful for each subgroup. The CIJE's "Goals Project" and its "Best Practices" project may help reveal valuable insights which will help communities define appropriate measures. The criteria for targeting will be helpful in narrowing the measures as well (see also Box 6).

Box 7: Selecting the Measure of Need

Here are some other considerations to bear in mind in deciding how to measure need:

• **Market** measures are most appropriate when the institutions of the community are relatively powerless to design incentives or exercise leverage to influence individual choices, other than by improving the programs that are offered.

• Conversely, **standards** will be appropriate when community institutions <u>are</u> in a position to offer incentives or exercise leverage, and have a clear and definable stake in the outcomes of the service area. The caliber and training of professionals is one case in point. Another example is the quality of the curriculum.

• In a needs analysis it is virtually impossible to "measure" **receptivity**, for example to a charismatic teacher or leader, to an effective new recruitment strategy, or to a climate that has been transformed by the involvement and participation of new actors and stakeholders. It is possible to examine programs that have been successful elsewhere to expand the vision of decision makers, particularly when it comes time to elicit or develop program strategies. In the context of the needs analysis, it is useful to ponder more ambitious alternatives when the expressed needs aspire to a low level.

<u>Measures of Resources</u>: Potential "needs" should be compared to available resources to identify areas of unmet need or "gaps". At the most basic level, a profile of educational resources should include:

■ Data on the numbers of programs, by type, their capacities (in terms of openings, places) and actual enrollments

■ Data on numbers of personnel (reprise from profile or survey) qualified for different program types -- as a measure of shortages or capacity to serve more participants

■ Utilization of space

■ Levels of funding

■ Anticipated changes (including resources in the pipeline, such as new programs being planned or anticipated cutbacks)

<u>Measures of Quality</u>

Ideally, a profile of resources should also incorporate assessments of their *quality*. For example, while a community may appear to have enough supplementary school programs, the more crucial issue is how good are they?

The quality of programs is generally measured by assessment of levels of achievement, or measures of performance. The task in Jewish education is substantially more difficult because of the paucity of satisfactory tests of knowledge or achievement, and the complexity of defining a set of generally acceptable standards. For these reasons, in the short run at least it makes sense to rely on "surrogate" measures of performance. For example, attendance and longevity/dropout statistics can be enlightening as indicators of changes in student performance. At the same time, lead communities may spearhead efforts to develop more direct measures of student performance.

If enrollment or attendance is low, or dropoff at age 13 is high, is it because the prospective students are not out there, no effort is made to recruit, the programs are poorly designed or because effort is needed to increase parental support? Information on the quality and effectiveness of programs is important for identifying strengths and weaknesses of the existing system, for developing strategies for improvement, and ultimately for establishing a baseline against which the impact of future efforts can be measured.

Regardless, the difficult in measuring quality dictates that in this area especially several iterations of study are necessary. Findings and gaps uncovered in one round define the task for the next round, as the community's efforts to better ??? information collection, and surveys are implemented, and hear fruit.

Generally speaking, three types of measures can be used: (1) input, (2) output or performance, and (3) outcomes. See Box 8 for examples of measures to consider. If you find an absence of information on effectiveness -- that, in itself, may suggest that critical issues for the community will be: How should programs be evaluated and against what criteria? What are the characteristics of an excellent educational program? Should there be a process for setting community standards and "accrediting" programs? Should there be an effort to develop community-wide performance indicators and what should they be?

Box 8: Illustrative Measures of Quality and Effectiveness

• **Measures of inputs** are generally the easiest to obtain. Examples include: per capita expenditures for various age cohorts and programs, teacher/student ratios, average teacher salaries, per cent of teachers with advanced degrees, lay involvement, number of teachers participating in in-service training, curriculum units developed and introduced, increases/decreases in educator/participant contact hours, and etc. Comparisons can be made to provide perspective on where the community stands in relation to other communities and the nation on key indicators.

• Examples of **output or performance measures** include per cent of eligible population participating in formal and informal Jewish education by age group, levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, etc. Methods of collecting this information include sample surveys, questionnaires to program directors, focus groups (for satisfaction), self-studies by schools, alumni surveys, data collected by a central body such as the Board of Jewish Education or Federation, and information collected in recent Jewish population studies.

• **Outcomes** are the most difficult to measure. It is useful to articulate what these might be, even if the data is not available, because it will be helpful in developing the mission statement later on as well as for suggesting lines of future research. Examples of outcome measures would be self-definition and commitment to Jewish identity, values and practices; evidence of transmission of Jewishness to the next generation; affiliation with synagogues, communal organizations, support of Israel and Jewish institutions, etc.

Community Mobilization: Through the very process of moving forward as a lead community and of engaging in the market analysis, findings will surface about the strengths and shortcomings on the awareness, involvement and commitment of various sectors of the community about Jewish education programs and commission initiatives. Examples of areas of potential attention include:

▣ Communication and collaboration between program professionals and rabbis

▣ Involvement of teachers, educators in informal settings in articulating problems and solutions

▣ The size (and growth) of the cadre of committed and supportive lay leaders, parents and/or donors

▣ The presence (or absence) of regular publicity/information announcements about Jewish education programs, performances, or initiatives (e.g. col??? in the local Jewish newspapers, community program catalogues, regular flyers, etc.)

These findings should be documented as part of the market analysis so that recommendations can be put forward to further mobilization of the community.

Summary of Benchmarks/Tasks

1.   Design Needs Analysis

a.   Focus: Select the primary element, issue or program to be studied

b.   Measures: Decide on the method(s) for measuring the needs (see Box 8)

c.   Develop Concept Scheme: Layout decisions on design for discussion with commission

2.   Collect Information: on present participation levels

3.   Estimate Community Need/Demand

4.   Gaps [3 minus 2]: a comparison of the market demand for the present programs will give an estimate of the unmet needs: who are the "unserved" or "underserved" groups in the community from the point of view of adult Jewish education?

5.   Qualitative Analysis: compile findings on problems, and limitations on program quality or effectiveness and recommendations for improvement

6.   Community Mobilization Impacts: compile findings and recommendations on recruitment and deeper involvement of students, personnel and stakeholders

leadership, parents,

Box 9: Methods

Defining Potential Markets: Four types of information can be used to identify the needs of user groups. As a rule, multiple methods should be employed because no single method will give a full picture of participation levels, as well as the quantative and qualitative limitations in the programs available for different groups.

• Available demographic studies and data: enrollment trends, statistics on personnel involved in Jewish education and communal affairs (e.g., full-time, part-time, turnover, longevity ...), enrollment trends in local day and supplemental school programs (as a predictor of future personnel demands).

• Other national and local studies, commission and planning reports: such as the report of the Commission on Jewish Education in North America, local reports of task forces on Jewish continuity, and strategic planning reports that give insights on trends or external forces that will impact on needs. Experience in other cities can be analyzed for possible relevance. Opportunities for program modification or expansion will be identified where substantial unmet needs are documented and where new revenue opportunities appear to exist.

• Discussion or Focus groups: with selected consumer groups (such as day and supplementary school educators, synagogue lay leaders, students) to gain insights on access barriers as well as desires.

• Questionnaires: attitude surveys of selected sectors of the Jewish community; e.g. about student career interests; motivations for participating in specific program; views of institutional or program strengths or weaknesses; perceptions of their own needs or desires for Jewish education; and past and anticipated involvement in Jewish affairs.

Identify a variety of submarkets. Attempt to estimate the size of each submarket, the extent of the need and the competition.

3. Follow-on Agenda

Given the magnitude, complexity and the high stakes connected to developing the Lead Communities Project, self study should be on-going -- not a one-shot effort. Findings on one issue inevitably will raise more sophisticated questions. Moreover, limits on time and resources, information availability, and research capability dictate that the process be phased over a period of several years. The lead community will need to decide which parts of the self study to begin the first year, and which to postpone to later years.

Consequently, the objective should be to develop a design for years 2 through 5 for further data collection, in-depth studies in personnel, refinement of community mobilization efforts, and development of assessment instruments to better measure quality of formal and

informal Jewish education programs (for example, achievement measures to test knowledge of supplementary school students).

III. CRITICAL ISSUES

> *"The Jews of North America live in an open society that presents an unprecedented range of opportunities and choices. This extraordinary environment confronts us with what is proving to be an historic dilemma: while we cherish our freedom as individuals to explore new horizons, we recognize that this very freedom poses a dramatic challenge to the future of the Jewish way of life. The Jewish community must meet the challenge at a time when young people are not sure of their roots in the past or of their identity in the future. There is an urgent need to explore all possible ways to ensure that Jews maintain and strengthen the commitments that are central to Judaism."*

<div align="right">

A Time to Act, p. 25-26

</div>

Rationale

In charting future directions, any community faces a number of important policy choices: i.e., critical issues. Early discussions of the planning committee are the first step in identifying the critical issues in personnel and community mobilization. Findings emerging through the on-going self study, including information on educators, areas of needs in mobilizing the community, and program strengths and weaknesses, will help sort out and clarify the fundamental decisions.

Deliverables:

- Explicit assumptions
- Formulation of critical issues
- Document summarizing consensus of committee on each critical issue

Benchmarks and Methods

1. Assumptions: In designing the best possible system for coordinating and supporting Jewish education, there will be several fundamental "givens" (e.g., overcoming shortages in qualified Jewish education personnel will require systemic action in many areas, not just a single program). These assumptions should be made explicit to ensure agreement by the commission. Assumptions on which there is not consensus may well become "issues" which the committee must address. (See Box 10 for sample assumptions.)

Box 10: Sample Assumptions

1. Shortages in qualified Jewish education personnel will not be satisfactorily overcome until a series of systemic problems in the profession are addressed (e.g., salaries, training, career opportunities, empowerment in decision making) -- not just one element.

2. Talented young adults can be enticed to enter careers in Jewish education if major communal leaders (lay, rabbis, educators, professionals) take an active role in the recruitment process.

3. Significant levels of increased funding for Jewish education will not materialize if community leaders are not included early in the planning and decision on actions.

4. Jewish education has a more powerful impact on students when formal and informal experiences are linked.

5. The delivery system needs to offer an opportunity for balance (creative tension) between community-wide interests and the interests and perspectives of the religious movements (Reform, Conservative, Reconstructionist and Orthodox).

---

2. <u>Critical Issues</u>: The most important choices on enabling options faced by the community must be defined and resolved in order to set priorities in Jewish education. The planning committee will attempt to reach agreement on the important questions regarding personnel, community mobilization, and future investment in Jewish education throughout the community.

It may be useful to classify issues in cascading categories that proceed from more philosophic (i.e., mission) toward more operational (i.e., programmatic or organizational). (See Box 11 for types of issues.)

Box 11: Classification of Issues

1. Mission-level issues -- i.e. choices relating to the vision, philosophy and the role of the community in initiating or supporting the emerging needs.

2. Policy issues -- i.e. choices relating to the broad policies relevant to carrying out the community's mission. Some of these choices relate to professional development (e.g. the balance between in-service and pre-service training for pre-school teachers); recruitment (e.g. the balance between new entrants into the field, continuing education; re-training people from other fields); and community mobilization (e.g., the trade-offs between early action to create a sense of community support, versus the slower process of involvement of stakeholders in planning to build ownership).

3. Standards and Program Issues -- choices relating to the content and level of programming in Jewish education (e.g. what form of in-service training: mentoring program, workshops and course offerings, personalized growth plan for each educator, some of each; or what kind of staff development incentive plan: completion bonus, waived fees, contractual requirement).

4. Resource and organization Issues -- i.e. choices relating to the present or, more importantly, future capacity of the community to support mission and policies (e.g. the financial resources, agency roles, possible coordinative and integrative mechanisms). Stated differently, which actors, agents, or agencies will be/must be responsive to change as the community commits to a dramatic step forward on its Jewish education agenda.

IV. MISSION OR VISION STATEMENT

"Jewish education must find a way to transmit the essence of what Jewish life is all about, so that future generations of Jews will be impelled to search for meaning through their own rich traditions and institutions. Judaism must be presented as a living entity which gives the Jews of today the resources to find answers to the fundamental questions of life as readily as it did for our ancestors through the centuries."

A Time to Act, P. 27

Rationale

The heart of a strategic plan is a mission (or vision) statement, which should project a clear view of the aspirations of the community. The mission statement for the lead community should project a self-image of the community in relation to the enabling options for Jewish education. A good mission statement not only suggests what the community wants to accomplish but what it does not seek to accomplish; at the broadest level, it identifies whom it seeks to serve and how.

The mission statement is the result of a process that includes deliberation by and consultation with a broad cross section of the community -- lay leaders, scholars, rabbis, educators and communal professionals, parents and other stakeholders.

Deliverable

A concise mission statement. *(To be revised over time?)*

Benchmarks and Methods

Because of its importance, and the difficulty of crafting a good one, the mission statement needs to be the product of substantial analysis and discussion; It should be prepared in the middle of the planning process, not at the beginning. The CIJE goals project ~~will produce materials that will likely~~ *could* be of ~~considerable~~ help to communities as they formulate missions.

It should represent the resolution of mission-level critical issues and frame a broad response to the needs assessment. Some parts of the mission statement are not likely to be very controversial; others might be ~~extremely controversial~~. It is helpful to identify the major options in relation to each critical issue as a framework for the key discussion at which the mission statement gets formulated (see illustration in Box 12 below):

Box 12: Illustrative Mission/Options Chart

CRITICAL ISSUES	OPTION A	OPTION B	OPTION C
1.0 Depth or breadth in near term (i.e. next 1-1/2 years) new programs for personnel	Resources should be targeted on one key group of Jewish educators, such as senior educators in schools and informal settings	Programs should be designed to impact more or less equally on all categories of Jewish educators	Every Jewish educator should obtain some benefit from a new program, however, at least xx% of the total new resources should be targeted to a single group
2.0 Priority for leadership training recruitment	Senior leaders should be recruited	Promising young talent, future leaders, should be recruited	Placement in programs should be based on motivation and self selection, for example, on a first come first served basis
3.0 Community posture on an Israel experience for young people	Community's responsibility is to insure that every young person has an Israel experience opportunity	Joint responsibility of community-congregation-family to insure that every young person has an Israel experience opportunity	Community responsibility to insure that xx% of young people have an Israel experience opportunity

V. SETTING STRATEGIES AND PRIORITIES

"... the needs of education have seemed to be less urgent, less insistent, more diffused [than other issues]; a problem that could be dealt with at some point in the future when more pressing problems have been solved. This is an illusion. ... we can no longer postpone addressing the needs of Jewish education, lest we face an irreversible decline in the vitality of the Jewish people."

<div align="right">

<u>A Time to Act</u>, p. 28

</div>

Rationale

The purpose of this part of the planning process is to insure that Jewish communal resources available for Jewish education are directed to the lead community's needs and mission. This is accomplished by selecting effective strategies or policies, and setting appropriate priorities.

The policies in the Plan represent resolutions of the critical issues identified above. Resolution of an issue need not strictly adhere to the alternatives that were considered when the issue was defined. It may combine elements of several choices or be an alternative not previously thought of.

Establishing priorities for any community is extremely difficult: first, because of the large number of programmatic options it would be desirable to undertake to increase community support or to build the Jewish education profession (e.g., increase salaries, upgrade senior educators, recruit new talent, expand training programs, open a resource center, develop a mentoring program, etc.); and second, because of the multiplicity of constituencies, and their differing values. A particular educational service may be very important to one group and unimportant to another. The challenge is to develop an approach in which all important views are heard, and then strategies and priorities are developed to insure that the community does not scatter its limited resources.

"Priorities" are seen as judgments about relative importance that inform ~~first only~~ dollar allocation decisions in the budgeting process, ~~but also~~ decisions ~~about~~ use of non-fiscal resources (such as leadership and staff of community agencies), and resource development (such as foundation and endowment development) *as well as*

Deliverables

- List of policy recommendations for the improvement of community mobilization

- Recommended priority rank and desirable sequence for each recommendation

- List of criteria used to select and rank policy recommendations

Benchmarks and Methods

Good methods of priority analysis inform and support human judgment, but do not try to supplant it; formulas or mechanical weighing or scoring methods are typically not useful.

Options are the items to improve personnel and mobilize the community that are ranked in setting priorities. In other words, an "option" is a direction, service, or new initiative that is a potential recipient or user of a commission resource. An options structure is an organized, systematic listing of all the possible options. The decision as to what to list as an option is an absolutely crucial one; for once that decision is made, it defines what gets ranked in priority-setting.

A good structure for priority-setting should help decision makers connect broad concerns with specific services or programs -- both those that exist as well as those program or services that do not, but that reflect community concerns.
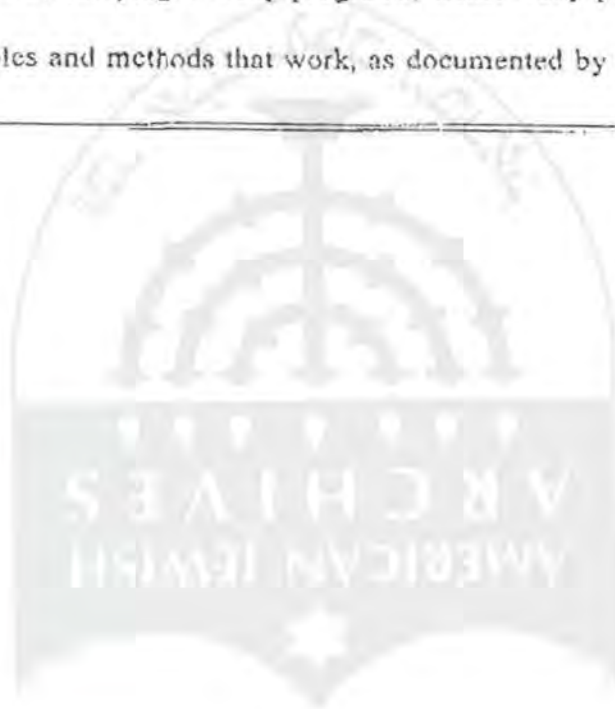
There are three sources of criteria relevant to setting priorities among options:

■ Criteria that are suggested by analyses of community needs in other areas. Other things being equal, one would tend to give priority to settings where the total needs are very large (e.g. personnel for supplementary schools) or where the gap between existing and needed services is the largest (e.g. in-service education).

■ Criteria that derive from the community's mission statement.

■ Criteria that derive from continental experience in planning for Jewish education. CIJE may be able to provide assistance in this area.

Sample criteria for the selection of effective strategies (policies) and priorities are illustrated in Box 13.

Box 13: Sample Criteria for Selecting Strategies and Priorities

- Supports professionalization of principals, teachers, and educators in informal settings -- including incentives for higher levels of education.

- Broadens lay leader involvement and support of Jewish education.

- Maximizes effective utilization of resources (minimize duplication).

- Maximizes the opportunity to integrate formal and informal educational techniques (e.g., family shabbatonim; camping + study programs; Israel study programs).

- Incorporates principles and methods that work, as documented by CIJE's "Best Practices" project.

VI. DESIGNING PROGRAMS/PILOT PROJECTS

"Jewish education must be compelling -- emotionally, intellectually, and spiritually -- so that Jews, young and old, will say to themselves: 'I have decided to remain engaged, to continue to investigate and grapple with these ideas, and to choose an appropriate way of life.' "

A Time to Act, p. 26

Expanded, modified, and new programs of course are the most tangible part of the effort to improve Jewish education throughout the community. In the context of a lead community, they are important not just for the promise they hold to improve the enterprise, but also because they can serve as visible demonstrations that help attract larger circles of adherents.

The recent history of Jewish education, as with many other enterprises, contains instances of programs hastily put together to address frustrating problems. Here we hope to shift the emphasis toward the tried, proven and planned. "Best Practices," a CIJE project that is documenting successful programs throughout the continent and organizing them in a variety of categories, should be immensely helpful here. "Best Practice" programs are being classified in six areas:

- Supplementary schools
- Early childhood Jewish education
- JCCs
- Israel experience
- Day schools
- Jewish camping

The "Best Practices" project is now developing a method by which lead community planners and educators can learn from documented best practices 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 practice practitioners to lead communities; workshops with educators in lead communities, etc.

We envision programs being launched in two stages: first a few pilot projects to get started; and a subsequent series of programs reflecting the vision and priorities of the Commission.

Pilot Projects

A community may wish to launch a small number of pilot programs early in the process to begin getting results, to gain visibility for its lead community project, to mobilize the community and create a sense of excitement, and to test ideas about which it has a reasonably

high level of confidence of success. Programs selected as pilot should be ones which are likely to be consistent with long term directions, or likely to show results in a short period of time. Box 15 contains sample criteria for use in selecting pilot projects.

Selecting pilot projects that address high priority enabling options -- namely personnel and community mobilization -- is another way of helping to ensure the viability of the effort. Sample pilot programs are listed in Box 16.

Box 15: Sample Criteria for Pilot Project Selection

- Improves the profession (teachers, principals, and informal educators)

- High visibility -- likely to reinforce community mobilization efforts (e.g persuade funders to support future initiatives, catalyze stakeholder support)

- Maximizes the opportunity to replicate good results from other communities (e.g., via "Best Practices")

- Promotes multi-agency programming and cooperation

- Can feasibly be implemented quickly

Box 16: Sample Ideas for Pilot Projects

Personnel

- In-service training for educational leadership -- school principals and JCC program directors.

- In-service training for 2 teachers and 2 informal educators from each institution.

- Summer seminar in Israel for selected educators

Community Mobilization

- Leadership training program for congregational and agency board members.

- A series of public forums on the lead community idea, "Best Practices" and/or the community vision. *goals and visions for Jewish Education*

Commission Programs

A coherent set of programs should evolve from the commission process, reflecting the vision, strategies, priorities, and recommendations of the commission. A refined set of criteria for program selection should also naturally evolve from those deliberations.

Program Selection: There are several methods for developing programs and working out program implementation details:

- Delegate responsibility for specific recommendations to agencies
- Empower task forces as part of commission deliberations.

Box 17 offers suggestions for developing program recommendations which, with some modifications, apply to each of the above selection approaches.

Box 17: Steps in Developing Program Recommendations

- Adapt commission criteria for evaluating ideas

- Develop list of promising program ideas: review "Best Practices" materials for promising programs, confer with CIJE, best practices sites, and/or national institutions

- Test assumptions: define questions and obtain answers

- Review most promising ideas for content, scope of impact, and quality

- Review with CIJE, national experts, and local users

- Detail program needs, operations and implementation

- Estimate costs

- Set priorities and phasing among program ideas

- Present priorities and justification to commission

[handwritten note in right margin: priority]

[handwritten note at bottom: CIJE role needs strengthening see head committees at work]

UKELES ASSOCIATES INC.

611 Broadway, suite 505 · New York, NY 10012
tel (212) 260-8758 · fax (212) 260-8760

FACSIMILE TRANSMITTAL SHEET

	DATE: 1-29.93
TO: Annette Hochstein	FROM: Jim Mervis
COMPANY:	PAGES (including cover): 22
FAX #:	FAX #: (212) 260-8760

MESSAGE:

If there is a problem with this transmission

please call _____ at (212) 260-8758.

MEMORANDUM

To: Annette Hochstein

From: Jim Meier

Date: January 29, 1993

Re: Redraft of the Planning Guidelines

A redraft of the first two-thirds of the planning guidelines is attached. My goal is to fax the remaining pages to you in Cleveland on Monday. I look forward to any comments by phone (or fax) Monday morning so I can try to incorporate them in the turnaround for Monday PM.

Hope you have a good flight to the US.

TABLE OF CONTENTS

[draft: guide.06   01-29-93]

LEAD COMMUNITIES PLANNING GUIDE

"Our goal should be to make it possible for every Jewish person, child or adult, to be exposed to the mystery and romance of Jewish history, to the enthralling insights and special sensitivities of Jewish thought, to the sanctity and symbolism of Jewish existence, and to the power and profundity of Jewish faith. As a motto and declaration of hope, we might adapt the dictum that says, 'They searched from Dan to Beer Sheva and did not find an am ha'aretz!' 'Am ha'aretz,' usually understood as an ignoramus, an illiterate, may for our purposes be redefined as one indifferent to Jewish visions and values, untouched by the drama and majesty of Jewish history, unappreciative of the resourcefulness and resilience of the Jewish community, and unconcerned with Jewish destiny. Education, in its broadest sense, will enable young people to confront the secret of Jewish tenacity and existence, the quality of Torah teaching which fascinates and attracts irresistibly. They will then be able, even eager, to find their place in a creative and constructive Jewish community."

Professor Isadore Twersky

"It is clear that there is a core of deeply committed Jews whose very way of life ensures meaningful Jewish continuity from generation to generation. However, there is a much larger segment of the Jewish population which is finding it increasingly difficult to define its future in terms of Jewish values and behavior. The responsibility for developing Jewish identity and instilling a commitment to Judaism for this population now rests primarily with education."

"Recent developments throughout the continent indicate that a climate exists today for bringing about major improvements. However, a massive program will have to be undertaken in order to revitalize Jewish education so that it is capable of performing a pivotal role in the meaningful continuity of the Jewish people."

Atlanta, Baltimore, and Milwaukee have taken on an exciting challenge and an awesome responsibility: to dramatically improve Jewish education throughout their communities, and in the process, to serve as beacons in the art of the possible for North American Jewry. These "lead communities" will provide a leadership function for other communities throughout the continent. 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.

INTRODUCTION

This set of guidelines has the luxury and the challenge of preaching to the converted. Jewish communities understand and have been engaged in planning for a long time. The lead communities more than many others have made pioneering efforts in planning for Jewish education and continuity. Despite that advantage, all of us are acutely aware of the limitations in the available information and the magnitude of the task of setting out a plan that addresses the challenges of the Lead Communities Project.

The purposes of these guidelines are to:

■ offer approaches, methods, data collection instruments and other tools to use in the planning process, and

■ give some measure of uniformity to the planning process that each of the lead communities will engage in.

Each community will, of course, need to tailor these guidelines to its own circumstances.

As a general principle the object is to build upon the work and the research that has already been done in each community and use those as a point of departure for the Lead Communities Project. On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.

I. FIRST STEPS

"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."

Rationale

First steps refer to preparations, to allow for smooth sailing once the serious work gets underway.

Major Activity Areas

There are two major areas for attention:

1.   Initial mobilization of leadership (lay and professional)
2.   Introducing the idea into the community

Building a "wall-to-wall coalition" of all those in the community who care about Jewish education is an important initial step of the Lead Communities Project. A widening net of stakeholder involvement in Jewish education is one of our instruments for engaging a larger portion of the Jewish community. The mobilization of leadership is a pivotal element for achieving that objective.

The first issue is to identify and recruit core leadership to spearhead the lead communities effort, while devising a structure that allows a broad cross-section of the community to become actively engaged in the project. The leadership therefore must be carefully selected, and the structure must allow ample opportunity for constituents to obtain a stake in the process. Box 1, Concentric Circles of Leadership, suggests a possible framework for organizing the project.

Tasks

1. Identify and recruit key leadership, including:

   - Chair
   - Lay leaders
   - Major donors
   - Educators
   - Rabbis
   - Other professionals

Box 2:   Examples of Background Materials

- <u>A Time To Act</u>

- Draft of CIJE letter of agreement

- Previous planning documents, particularly on Jewish education or continuity, prepared by your community.

- Other studies and documents relating to the community's educational systems.

- Summary of most recent Jewish population study for your community.

- CIJE project descriptions

   o "Best Practices"

   o Monitoring, Evaluation and Feedback

   o Goals Project

---

3. Convene Commission

   ■ Establish a detailed timetable for the project by working backward from the year one end date, as well as forward based on the amount of time work components will require.

   Working with the chairperson of the committee, establish a schedule of committee meetings all the way through the first year of planning. Scan major Jewish and national holidays for conflicts. (See Box 3 for an illustrative schedule of steps.)

   ■ Prepare a tentative agenda for the first committee meeting to review with the chair.

Box 3: Illustrative Planning Framework

Phase	Deliverable	Commission Meeting Subject
1. Start-up	(1) Form Commission • Discuss the idea • Detailed workplan • Agree on mandate (2) • Form committees	1a. The Lead Communities Project in our community Main thrusts - personnel - community mobilization Key methods and projects - Best Practices - dealing with goals - Monitoring evaluation feedback projects Structures: CIJE and Lead Community Commission 1b. Review of workplan 1c. Develop charge to committees
2. Start Self-study (ongoing)	• Design scheme • Survey of educators in the community • Profile of Jewish education: strengths and weaknesses • Report on findings	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	• Formulate issues	3. Resolve strategic issues: make choices
4. Mission or Vision Statement	• Draft community mission statement	4. Approve mission/vision statement
5. Strategies and Priorities for Action	• List of recommendations for each major area (personnel) community mobilization. Israel experience with priority rankings and priority sequencing	5. Recommendations on priorities
6. Programs	• Draft guidelines • Define program priority areas and new initiatives • Issue call for program proposals	6. Define program priorities
7. Financial Resource Development	• Fundraising plan (e.g., potential donors, strategies, targets, timetable)	7. Approve and agree on assignments for carrying out plan.
8. First year action plan	• Draft budget with resource objectives • Compile summaries of program options • Prepare first year implementation plan	8a. Select programs for next year 8b. Approve overall implementation plan 8c. Set resources objectives ($)

4. Devise task force structure

It is helpful to organize task forces to address substantive issues and make recommendations to the full commission. Once pilot operations begin, the role of these committees can be modified to monitor and evaluate projects they have initiated.

There are several ways of organizing task forces. Here are some samples:

■ Main thrusts of the recommendations of the Commission on Jewish Education in North America
  O personnel
  O community mobilization
  O research/self-study
  O Israel experience

■ Delivery settings, e.g.:
  O day schools
  O supplementary schools
  O programs in informal settings

■ Functional, the classic "Board of Directors" model, e.g.:
  O pilot projects
  O best practices
  O goals of Jewish education
  O monitoring and evaluation
  O fundraising
  O coalition building and marketing/networking
  O educator's survey
  O five year planning

■ Client focus, e.g.
  O early childhood
  O elementary school age
  O secondary school age

Issues to consider in deciding on the most effective approach for organizing include:

■ Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.

■ Energizing: Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.

■ Priorities: Do the topics represent articulated, or likely, priority areas of the Lead Communities Project.

The time and commitment of top lay leaders to serve as chairs, and the depth of capable professionals to service the task forces are factors to consider in deciding on the number of committees.

II. SELF-STUDY

> "[An important step in mobilizing is...] *to review the current state of Jewish education in its various aspects. This will provide the basis for analyzing the problems, considering the achievements and shortcomings, and determining where the most promising opportunities for improvement might lie.*"

Rationale

Obtaining reliable information about something as complex as a community's educational system is an ongoing endeavor. Its payoffs are immediate, long-term, and continuous: as the community learns more about itself, its decision making will improve. Over time, the process will yield better and better quantitative and qualitative data about what exists in the community's Jewish education system, how good it is, what people in the community want, what more is needed and what works better.

Lead communities can offer leadership in this area too, developing means, methods and experience for an ongoing process of serious self-study. Hopefully, the tools developed in lead communities will be disseminated for other communities to adopt and adapt.

The initial purpose of the self-study is to provide commission members with an increasingly solid foundation of information, to enlighten even the most knowledgeable insider, and to identify the critical issues and choices the commission may choose to address. It will also help move the community towards establishing standards of achievement that the community aspires to.

The self-study process is an ongoing one; it will not be completed within the first year of the project. It is proposed that during the first year of the project the self-study include the following 3 elements:

1. A *profile* of the Jewish education enterprise in the community, including the following:

   ▪ Participation (absolute numbers, rates and trends)
   ▪ Inventory of programs, institutions, organizations
   ▪ Program resources
   ▪ Financial resources

2. A *needs analysis* to focus during the first year on personnel-related issues, a central part of which will be an educator's survey.

3. A *follow-on agenda* for continuing analysis during years 2-5.

1. Profile

a. Develop profile of present Jewish education personnel by drawing on available data. (Note: knowledge of educator strengths and needs will be enriched as returns on the educator's survey, discussed below, are compiled, most likely in year two.)

- Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood, camps counselors, JCC program staff, other informal education personnel) by institution/program

- Skills, expertise and background

- Salary levels

b. Develop demographic profile of Jewish education needs in the community.

- Jewish population characteristics: cohort sizes (e.g., early childhood, school age lay leaders, adult education learners, college-age youth, other special groups, like mixed married couples)

c. Develop inventory of program capacities and participation rates (formal and informal programs, by institution/program)

- Develop a profile of the institutional resources, programs and services presently available in the community. Estimate the capacity of these programs if they are not being fully utilized. (See Box 9 for categories of information to describe each program area.)

Box 9: Elements of an Institution or Program Profile

- Students:
  - . Enrollment and graduation trends
  - . Age range

- Educators:
  - . Numbers of full- and part-time
  - . areas of expertise

- Program components:
  - . Subjects
  - . Degree(s) offered
  - . Activity duration
  - . Methods
  - . Support resources (e.g. library, training) and services

- Finances
  - . Cost per unit of service
  - . Revenue and expenditure trends

---

d. Summarize commonly expenditure levels for major categories of services. E.g.:

- Central agency

- Day schools

- Supplementary schools

- JCC education services

- Camps

2. Needs Analysis

A needs analysis identifies unserved and underserved needs for Jewish education. It will include:

- Educator's survey

- Market analysis: selected client/consumer groups

- Assessment of quality

Educators' Survey

Given the critical importance of personnel in Jewish education and is centrality in the Lead Communities Project, an educators' survey should be an early and major component of the needs analysis. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 4 contains ideas for areas to cover in a survey of Jewish education personnel. Adapting or building upon educator surveys undertaken in recent years by other communities is also recommended.

Make sure to involve experienced social scientists, and formal and informal educators in the design and implementation of the survey. Involving people from the field will improve the quality of the data elements selected, help avoid time and resource consuming efforts to obtain unavailable information, help pave the way when it comes time to collect data, and help mobilize educators to support the overall objectives of the commission.

Summarizing, the initial thinking about the educator's survey should take several factors into account:

- The purpose of the survey:
  - to identify in-services training needs
  - to understand the structure of employment (is most of the work force very much part-time, vocational, or avocational, reasonably well paid, or not)

- Categories of Information: What information is desired (see Box 4)

- Database: Allow for growth, in number of information fields as well as in number of records

- Involve formal and informal educators

- Select survey director, or researcher with requisite expertise. In selecting staff, or contracting with a researcher, thoroughly review assignments, expectations and workplans

In view of the importance, complexity, and ongoing nature of this aspect of the lead community effort, it may be advisable to convene a special task force (if such a task force was not built into the organizing framework) to oversee this phase of work.

> **Box 4: Educators' Survey: Possible Categories for Inventory** (Illustrative only)
>
> • Demographic profile (e.g., sex, age, marital status, address)
>
> • Affiliation
>
> • Jewish education background (e.g., degrees, Jewish and secular licensure) courses and programs
>
> • In-service staff development (subjects, scope and level)
>
> • Work history
>
> • Jewish education work experience (e.g., years of experience, present and recent positions, full-time and part-time weekly hours; camp, other summer and other part-time jobs)
>
> • Secular education positions
>
> • Salary history, in Jewish education
>
> • Inventory of formal and informal expertise (e.g., Judaic/Hebrew; age level specializations; teacher training, resource room management, special education; organizing, supervisory or administrative skills). Classifiable as:
>   o Areas of knowledge
>   o Skills
>   o Special talents
>
> • Attitudinal questions (e.g., Jewish education career intentions; job satisfaction and priority concerns)

Market Analysis

A market analysis attempts to quantify the unmet demand among different client groups for various Jewish education services/programs, and the potential pool of consumers who might participate if programs were made attractive enough to them.

Client Sub-groups: Jewish education in formal and informal settings can have an impact on Jewish values, behavior and identity throughout a life time, from infancy to grandparenting. The strength of an individual's practice and convictions can significantly influence a constellation of family members and friends that individual interacts with. There are no easy answers to the question of which (or whether any) sub-group or stage in life is the most pivotal for Jewish continuity. Therefore, with respect to potential client groups, two important issues should be

articulated and addressed up-front:

1. Targeting: which client sub-group should be studied first?

2. Measures of Need: what is the appropriate definition of need?

Targeting: The first step is to select the key consumer groups, in addition to Jewish education professionals, to be the focus of research during the first round. One construct of categories from which to select client sub-groups is:

- Early childhood
- Ages 5-13
- Post Bar/Bat Mitzvah
- College age
- Parents of young children
- Singles
- Empty nesters
- Older adults

Given limited resources, it may make sense to fine tune the targeting still further by looking at specific age groups in particular program areas, for example, Israel programs for teens.

Box 5: Targeting

Several criteria can be applied in making decisions about what information or which groups to target in the needs analysis.

• **Present knowledge:** How much is already known about the topic or the needs of the group? Has the issue or group previously been studied? Are there significant open questions about what the needs are or how they should be addressed?

• **Priority:** How high a priority is the topic or sub-group with respect to Jewish education? Are the needs of this group for Jewish education a major issue or concern in the community?

• **Importance:** How important is the group to promoting Jewish continuity and identity?

• **Feasibility:** What resources of time, effort, money are needed to answer the open questions?

Measures of Need: There are three conceptual ways of considering need:

a. "Market:" *Actual* demand by a defined set of people.

b. "Standard:" A measure of how much people require, or, from the community perspective, what is needed to realize a set of aspirations.

c. "Receptivity:" What people might *potentially* respond to, i.e. "buy", but cannot articulate because it is not within their past experience.

In designing the needs analysis, you must decide which measure or measures will be most useful for each subgroup. The "Goals Project" will reveal valuable insights which will help communities define appropriate measures. The criteria for targeting will be helpful in narrowing the measures as well. See also Box 6.

Box 6: Selecting the Measure of Need

Here are some other considerations to bear in mind in deciding how to measure need:

• **Market** measures are most appropriate when the institutions of the community are relatively powerless to design incentives or exercise leverage to influence individual choices, other than by improving the programs that are offered.

• Conversely, **standards** will be appropriate when community institutions <u>are</u> in a position to offer incentives or exercise leverage, and has a clear and definable stake in the outcomes of the service area. The caliber and training of professionals is a case in point.

• In a needs analysis it is virtually impossible to "measure" **receptivity**, for example to a charismatic teacher or leader. It is possible to examine programs that have been successful elsewhere to expand the vision of decision matters, particularly when it comes time to elicit or develop program strategies. In the context of the needs analysis, it is useful to ponder more ambitious alternatives when the expressed needs aspire to a low level.

Measures of Resources: Potential "needs" should be compared to available resources to identify areas of unmet need or "gaps". At the most basic level, a profile of educational resources should include:

■ Data on the numbers of programs, by type, their capacities and actual enrollments

■ Data on numbers and characteristics of personnel

- Utilization of space

- Levels of funding

- anticipated changes (including resources in the pipeline, such as new programs being planned or anticipated cutbacks)

Measures of Quality

Ideally, a profile of resources should also incorporate assessments of their *quality*. For example, while a community may appear to have enough supplementary school programs, the more crucial issue is how good are they?

The quality of programs is generally measured by assessment of levels of achievement, or measures of performance. The task in Jewish education is substantially more difficult because of the paucity of satisfactory tests of knowledge or achievement, and the complexity of defining a set of generally acceptable standards. Moreover, it is not clear that there is a consensus that "testable" knowledge is even the right objective. For these reasons, in the short run at least it makes sense to rely on "surrogate" measures of performance. For example, attendance and longevity/dropout statistics can be enlightening as indicators of changes in student performance.

If enrollment or attendance is low, or dropoff at age 13 is high, is it because the prospective students are not out there, no effort is made to recruit, the programs are poorly designed or because effort is needed to increase parental support? Information on the quality and effectiveness of programs is important for identifying strengths and weaknesses of the existing system, for developing strategies for improvement, and ultimately for establishing a baseline against which the impact of future efforts can be measured.

Regardless, the difficult in measuring quality dictates that in this area especially several iterations of study are necessary. Given the imperative to get underway quickly, we would encourage you to rely on existing information on quality and effectiveness, to the extent possible. Findings and gaps uncovered in one round define the task for the next round.

Generally speaking, three types of measures can be used: (1) input, (2) output or performance, and (3) outcomes. See Box 7 for examples of measures to consider. If you find an absence of information on effectiveness -- that, in itself, may suggest that critical issues for the community will be: How should programs be evaluated and against what criteria? What are the characteristics of an excellent educational program? Should there be a process for setting community standards and "accrediting" programs? Should there be an effort to develop community-wide performance indicators and what should they be?

Box 7: Illustrative Measures of Quality and Effectiveness

• **Measures of inputs** are generally the easiest to obtain. Examples include: per capita expenditures for various age cohorts and programs, teacher/student ratios, average teacher salaries, per cent of teachers with advanced degrees, lay involvement, number of teachers participating in in-service training, etc. Comparisons can be made to provide perspective on where the community stands in relation to other communities and the nation on key indicators.

• Examples of **output or performance measures** include per cent of eligible population participating in formal and informal Jewish education by age group, levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, etc. Methods of collecting this information include sample surveys, questionnaires to program directors, focus groups (for satisfaction), self-studies by schools, alumni surveys, data collected by a central body such as the Board of Jewish Education or Federation, and information collected in recent Jewish population studies.

• **Outcomes** are the most difficult to measure. It is useful to articulate what these might be, even if the data is not available, because it will be helpful in developing the mission statement later on as well as for suggesting lines of future research. Examples of outcome measures would be self-definition and commitment to Jewish identity, values and practices; evidence of transmission of Jewishness to the next generation; affiliation with synagogues, communal organizations, support of Israel and Jewish institutions, etc.

<u>Benchmarks/Tasks</u>

1. Design Needs Analysis

    a. <u>Focus:</u> Select the primary programs to be studied

    b. <u>Measures:</u> Decide on the method(s) for measuring the needs (see Box 8)

    c. <u>Develop Concept Scheme:</u> Layout decisions on design for discussion with commission

2. Collect information: on present participation levels

3. Estimate of community need/demand

4. Gaps [3 minus 2]: A comparison of the market demand for the present programs will give an estimate of the unmet needs: who are the "unserved" or "underserved" groups in the community from the point of view of adult Jewish education?

Box 8: Methods

<u>Defining Potential Markets</u>: Four types of information can be used to identify potential user groups:

• Available demographic studies and data: enrollment trends, statistics on personnel involved in Jewish education and communal affairs (e.g., full-time, part-time, turnover, longevity ...), enrollment trends in local day and supplemental school programs (as a predictor of future personnel demands).

• Other national and local studies, commission and planning reports: such as the report of the Commission on Jewish Education in North America, local reports of task forces on Jewish continuity, and strategic planning reports that give insights on trends or external forces that will impact on needs. Experience in other cities can be analyzed for possible relevance. Opportunities for program modification or expansion will be identified where substantial unmet needs are documented and where new revenue opportunities appear to exist.

• Discussion or Focus groups: with selected consumer groups (such as day and supplementary school educators, synagogue lay leaders, students) to gain insights on access barriers as well as desires.

• Questionnaires: attitude surveys of selected sectors of the Jewish community: e.g. about student career interests; motivations for participating in specific program; views of institutional or program strengths or weaknesses; perceptions of their own needs or desires for Jewish education; and past and anticipated involvement in Jewish affairs.

Identify a variety of submarkets. Attempt to estimate the size of each submarket, the extent of the need and the competition.

---

3. Follow-on Agenda

Given the magnitude, complexity and the high stakes connected to Jewish education in a community, self study should be on-going -- not a one-shot effort. Moreover, limits on time and resources, information availability, and research capabilities dictate that the process be phased over a period of several years. Findings on one issue inevitably will raise more sophisticated questions.

Consequently, the objective should be to develop a design for years 2 through 5 for further data collection, in-depth studies, and development of assessment instruments to better measure quality of formal and informal Jewish education programs (for example, achievement measures to test knowledge of supplementary school students).

III. CRITICAL ISSUES

[INSERT FROM TIME TO ACT]

Rationale

In charting future directions, any community faces a number of important policy choices: i.e., critical issues. Early discussions of the planning committee are the first step in identifying the critical issues, for example, in personnel and community mobilization. Findings emerging through the on-going self study, including information on educators, areas of needs in mobilizing the community, and program strengths and weaknesses, will help sort out and clarify the fundamental decisions.

Deliverables:

- Explicit assumptions

- Formulation of critical issues

- Document summarizing consensus of committee on each critical issue

Benchmarks and Methods

1. <u>Assumptions</u>: In designing the best possible system for coordinating and supporting Jewish education, there will be several fundamental "givens" (e.g., that the school in a congregation is the primary educational vehicle for supplementary education). These assumptions should be made explicit to ensure agreement by the commission. Assumptions on which there is not consensus may well become "issues" which the committee must address. See Box 10 for sample assumptions.

Box 10: Sample Assumptions

---

1. The primary instrument of supplementary education is the school within a congregation.

2. Jewish education has a more powerful impact on students when formal and informal experiences are linked.

3. The delivery system needs to offer an opportunity for balance (creative tension) between community-wide interests and the interests and perspectives of the religious movements (Reform, Conservative, Reconstructionist and Orthodox).

4. Some type of central entity or entities will be needed to support Jewish education in the community.

2. <u>Critical Issues</u>: The important choices faced by the community in defining the purposes, overall content, and priorities in Jewish education. The planning committee will attempt to reach agreement on what the important questions regarding future investment in Jewish education throughout the community.

It may be useful to classify issues in cascading categories that proceed from more philosophic (i.e., mission) toward more operational (i.e., programmatic or organizational). (See Box 11 for types of issues.)

Box 11: Classification of Issues

1. Mission-level issues -- i.e. choices relating to the vision, philosophy and the role of the community in initiating or supporting the emerging needs.

2. Policy issues -- i.e. choices relating to the broad policies relevant to carrying out the community's mission. Some of these choices relate to professional development (e.g. the balance between in-service and pre-service training for pre-school teachers); recruitment (e.g. the balance between new entrants into the field, continuing education; re-training people from other fields); and community mobilization (e.g., the trade-offs between early action to create a sense of community support, versus the slower process of involvment of stakeholders in planning to build ownership).

3. Standards and Program Issues -- choices relating to the content and level of programming in Jewish education.

4. Resource and organization Issues -- i.e. choices relating to the internal capacity of the community to support mission and policies (e.g. the financial resources, agency roles, possible coordinative and integrative mechanisms).

IV. MISSION OR VISION STATEMENT

Rationale

The heart of a strategic plan is a mission (or vision) statement, which should project a clear view of the aspirations of the community. The mission statement should project a the self-image of the community in relation to Jewish education. A good mission statement not only suggests what the community wants to accomplish but what it does not seek to accomplish; at the broadest level, it identifies whom it seeks to serve and how.

Deliverable

A one paragraph to one page Mission Statement.

Benchmarks and Methods

Because of its importance, and the difficulty of crafting a good one, the mission statement needs to be the product of substantial analysis and discussion; it should be prepared in the middle of the planning process, not at the beginning.

It should represent the resolution of mission-level critical issues and frame a broad response to the needs assessment. Some parts of the mission statement are not likely to be very controversial; others might be extremely controversial. It is helpful to identify the major options in relation to each critical issue as a framework for the key discussion at which the mission statement gets formulated (see illustration in Box 12 below):

Box 12: Illustrative Mission/Options Chart			
CRITICAL ISSUES	OPTION A	OPTION B	OPTION C
1.0 Community posture on an Israel experience for young people	Community responsibility to insure that every young person has an Israel experience opportunity	Joint community-congregation-family responsibility to insure that every young person has an Israel experience opportunity	Community responsibility to insure that xx% of young people have an Israel experience opportunity
Critical Issue 2.0; etc	Option 2.0A	Option 2.0B	Option 2.0C

V. SETTING STRATEGIES AND PRIORITIES

Rationale

The purpose of this part of the planning process is to insure that scarce Jewish communal resources available to Federation and other communal entities for Jewish education are directed to the community's needs and mission. This is accomplished by: selecting effective strategies or policies; setting appropriate priorities.

The policies in the Plan represent resolutions of the critical issues identified above. Resolution of an issue need not strictly adhere to the alternatives that were considered when the issue was defined. It may combine elements of several choices or be an alternative not previously thought of.

Establishing priorities for any community is extremely difficult because of the multiplicity of constituencies and their differing values. A particular educational service may be very important to one group and unimportant to another. The challenge is to develop an approach in which all important views are heard, and then strategies and priorities are developed to insure that the community does not scatter its limited resources.

"Priorities" are seen as judgments about relative importance that _inform_, not only dollar allocation decisions in the budgeting process, but also decisions about use of non-fiscal resources (such as government relations), and resource development (such as foundation and endowment development).

Deliverables

- List of policy recommendations for the improvement of Jewish education

- Recommended priority rank and desirable sequence for each recommendation

- List of criteria used to select and rank policy recommendations.

Benchmarks and Methods

Good methods of priority analysis inform and support human judgment, but do not try to supplant it; formulas or mechanical weighing or scoring methods are typically not useful.

Options are the items that are ranked in priority-setting. In other words, an "option" is something that is a potential recipient or user of a commission resource. An _options_ structure is an organized, systematic listing of all the possible options. The decision as to what to list as an option is an absolutely crucial one; for once that decision is made, it defines what gets ranked in priority-setting.

A good structure for priority-setting should help decision makers connect broad concerns with specific services or programs -- both those that exist as well as those program or services that do not, but that reflect community concerns.

There are three sources of criteria relevant to setting priorities among options:

■ Criteria that are suggested by analyses of community needs. Other things being equal, one would tend to give priority to settings where the total needs are very large (e.g. supplementary schools) or where the gap between existing and needed services is the largest (e.g. in-service education).

■ Criteria that derive from the Mission Statement

■ Criteria that derive from continental experience in planning for Jewish education

Sample criteria for the selection of effective strategies (policies) and priorities are illustrated in Box 13.

Box 13: Sample Criteria for Selecting Strategies and Priorities

• Support professionalization of principals and teachers -- including incentives for higher levels of education.

• Encourage deeper communal involvement and support of Jewish education.

• Maximize effective utilization of resources (minimize duplication).

• Maximize the opportunity to integrate formal and informal educational techniques (e.g., family shabbatonim; camping + study programs; Israel study programs).

VI. DESIGNING PROGRAMS/PILOT PROJECTS

Expanded, modified, and new programs of course are the most tangible part of the effort to improve Jewish education throughout the community. In the context of a lead community, they are important not just for the promise they hold to improve the enterprise, but also because they can serve as visible demonstrations that help attract larger circles of adherents.

The recent history of Jewish education, as with many other enterprises, contains too many instances of programs being thrown at problems out of a sense of frustration or crisis. Here we hope to shift the emphasis toward the tried, proven and planned. "Best Practices," a CIJE project that is documenting successful programs throughout the continent and organizing them in a variety of categories, should be immensely helpful here. "Best Practice" programs are being classified in six groupings:

- Supplementary schools
- Early childhood Jewish education
- JCCs
- Israel experience
- Day schools
- Jewish camping

We envision programs being launched in two stages: first a few pilot projects to energize the project; and a subsequent series of programs reflecting the vision and priorities of the commission, which may also be phased to reflect funding flows or other factors.

Pilot Projects

A community may wish to launch a small number of pilot programs early in the process to gain visibility for its lead community project, to mobilize the community and create a sense of excitement, and to test ideas about which it has a reasonably high level of confidence of success. Programs selected as pilot should be ones which are likely to be consistent with long term directions, or likely to show reasonably dramatic results in a short period of time. Box 14 contains sample criteria for use in selecting pilot projects.

Selecting pilot projects that address high priority infrastructure needs -- namely personnel and community mobilization -- is another way of helping to ensure the viability of the effort. Sample pilot programs are listed in Box 15.

Box 14: Sample Criteria for Pilot Project Selection

- Improves professional status of teachers, principals, and informal educators

- Promises short-term success and visibility

- Maximizes the opportunity to replicate good results from other communities (e.g., via "Best Practices").

- Promotes multi-agency programming and cooperation

- Maximizes parental involvement

- Strengthens congregations

Box 15: Sample Ideas for Pilot Projects

Personnel

- In-service training for educational leadership -- school principals and JCC program directors.

- In-service training for 2 teachers and 2 informal educators from each institution.

- Summer seminar in Israel for selected educators

Community Mobilization

- Leadership training program for congregational and agency board members.

- A series of public forums on "best practices" and/or the community vision.

Commission Programs

A coherent set of programs should evolve from the commission process, reflecting the vision, strategies, priorities, and recommendations of the commission. A refined set of criteria for program selection should also naturally evolve from those deliberations.

Program Selection: There are several methods for eliciting and selecting program ideas, and working out program implementation details:

- Request for proposal (RFP) process

■   Delegate responsibility for specific recommendations to agencies
■   Empower task forces as part of commission deliberations.

Box 16 offers suggestions for developing program recommendations which, with some modifications, apply to each of the above selection approaches.

Box 16: Steps in Developing Program Recommendations

•   Brainstorm program ideas

•   Adapt commission criteria for evaluating ideas

•   Compare with other communities

•   Test assumptions: define questions and obtain answers

•   Confer with users

•   Detail program needs, operations and implementation

•   Estimate costs

•   Set priorities and phasing among program ideas

•   Present priorities and justification to Commission

VII. FINANCIAL RESOURCE DEVELOPMENT

Develop a short-term and a long-term strategy for obtaining funding to support Commission initiatives. Obvious potential categories include:

- Annual campaign allocations for local services (either increased amounts or reallocations)

- Creation or expansion of a fund for Jewish education

- Major donors

- Foundations (Jewish oriented, and possibly secular ones also)

Naturally, primary attention will focus on obtaining resources for start-up efforts.

We recommend that fundraising for this effort proceed in a planful way, much like the annual campaign:

1. Package most attractive program ideas

   . Select the most engaging program ideas to showcase
   . Package or repackage programs to be most appealing

2. Identify potential funders in different categories, e.g.:

   . Major donors
   . Medium/large donors
   . Family foundations
   . Community foundations
   . National foundations

3. Match programs to funder interests

4. Identify person/team to make first contact. Consider enlisting Commission members for this role.

5. Follow-up, as appropriate.

VIII. PREPARE FIRST YEAR ACTION PLAN

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

APPENDICES

MEMORANDUM

To: Shulamith Elster
           Seymour Fox
           Sol Greenfield
           Annette Hochstein
           Art Rotman
           John Woocher

From: Jim Meier

Date: December 29, 1992

Re: Second Draft of Planning Guide

Enclosed is the second draft of the planning guide for Lead Communities. I would appreciate your comments by Tuesday January 5, if at all possible.

Best wishes for a happy and healthy New Year.

LEAD COMMUNITIES PLANNING GUIDE

INTRODUCTION

This set of guidelines has the luxury and the challenge of preaching to the converted. Jewish communities understand and have been engaged in planning for a long time. The lead communities more than many others have made pioneering efforts in planning for Jewish education and continuity. Despite that advantage, all of us are acutely aware of the limitations in the available information and the magnitude of the task of setting out a plan that addresses the continuing Jewish education needs of an entire community.

The purposes of these guidelines are to:

• establish a timeframe for planning process benchmarks so that the first stages of implementation can begin in the Fall of 1993,

• offer approaches, methods, data collection instruments and other tools to use in the planning process, and

• give some measure of uniformity to the planning process that each of the lead communities will engage in during the next months.

Each community will need to tailor these guidelines to its own circumstances. While these guidelines encompass the full scope of the planning process, we acknowledge and emphasize that given the real constraints of time and resource limitations, no community can feasibly carry out every step. Each community must strike a balance between thoroughness and readiness to take action.

As a general principle the object is to build upon the work and the research that has already been done in each community. It usually does not make sense to reinvent the wheel. On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.

I. FIRST STEPS

Rationale

First steps refer to preparations, to allow for smooth sailing once the serious work gets underway.

Major Activity Areas

There are two major areas for attention:

1. Initial mobilization of lay leadership
2. Introducing the idea into the community

Building a "wall-to-wall coalition" is one central objective of the Lead Communities project. A widening net of stakeholder involvement is Jewish education is the instrument for engaging a larger portion of the Jewish community. The mobilization of project leadership is the pivotal starting point for achieving that objective.

The first issue is to identify core leadership to spearhead the effort, while devising a structure that allows a broad cross-section of the community to become actively engaged in the project. The leadership therefore must be carefully selected, and the structure must allow ample opportunity for constituents to obtain a stake in the process. Box 1, Concentric Circles of Leadership, suggests a framework for organizing the project.

Tasks

1. Identify key leadership, including:

   . Champion
   . Lay leaders and major donors
   . Educators
   . Rabbis
   . Professionals

2. Establish the oversight Commission, composed with representation that reflects the broad spectrum of the community. E.g., leadership from:

   . Federation
   . Synagogues
   . Communal agencies and organizations
   . Schools and programs

Box 1: Concentric Circles of Leadership

One way to organize to reconcile the dual objectives of strong and thoughtful leadership coupled with wide involvement is to develop expanding circles of leadership. For example:

• Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.

• Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.

• Task Forces, to address substantive issues and make recommendations to the full commission, and/or to monitor and evaluate projects once they begin operations. (See below.)

• Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

As a rule, broad representation of diverse constituencies is desirable at every level of organization. However, the top levels of leadership generally should contain a higher percentage of lay representation, while larger numbers of professionals, stakeholders, and agency staff are desirable on the task forces and ad hoc groups.

• Compile packets of background information and distribute to each of the committee members. Box 2 contains a selection of materials that may be useful for this purpose.

Box 2: Examples of Background Materials

• <u>A Time To Act</u>

• Draft of CIJE letter of agreement

• Previous planning documents, particularly on Jewish education or continuity, prepared by your community.

• Summary of most recent Jewish population study for your community.

• CIJE project descriptions

   . "Best Practices"

   . Monitoring, Evaluation and Feedback

• Establish a detailed timetable for the project by working backward from the year one end date, as well as forward based on the amount of time work components will require.

Working with the chairperson of the committee, establish a schedule of committee meetings all the way through the first year of planning. Scan major Jewish and national holidays for conflicts. (See Box 3 for an illustrative schedule of steps.)

• Prepare a tentative agenda for the first committee meeting to review with the chair.

Box 3: Illustrative Planning Framework

Phase	Deliverable	Committee Meeting Subject
1. Start-up	(1) • Form committee • Detailed workplan • Agree on mandate (2) • Form committees	1a. Major issues in Jewish Education 1b. Review of workplan 1c. Develop "charge" to committees
2. Self-study (Needs Analysis and Profile)	• Design scheme • Profile of Jewish education; strengths and weaknesses • Report on findings	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	• Formulate issues	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	• Draft community mission statement	4. Approve mission/vision statement(s)
5. Strategies and Priorities for Action	• List of recommendations for each major client group with priority rankings and priority sequencing	5. Recommendations on priorities
6. Programs	• Draft guidelines • Define program priority areas and new initiatives • Issue call for program proposals	6. Define program priorities
7. Financial Resource Development	• Fundraising plan (e.g., potential donors, strategies, targets, timetable)	7. Approve and agree on assignments for carrying out plan.
8. First year action plan	• Draft budget with resource objectives • Compile summaries of program options • Prepare first year implementation plan	8a. Set resource objectives (S) 8b. Select programs for next year 8c. Approve overall implementation plan

3. Devise task force structure

It is helpful to organize task forces to address substantive issues and make recommendations to the full commission. Once pilot operations begin, the role of these committees can be modified to monitor and evaluate projects they have initiated.

There are several ways of organizing task forces. Here are some samples:

- Population groups, e.g.:
  . 1 - 5: early childhood
  . 6 - 13: elementary school age
  . 14 - 18: high school/post bar/bat-mitzvah

- Delivery system, e.g.:
  . Day schools
  . Supplementary schools
  . Informal programs

- Functional, the classic "Board of Directors" model, e.g.:
  . Programs
      - Pilot projects
      - Best practices
  . Fundraising
  . Coalition building and marketing/networking
  . Monitoring and evaluation
  . Educator's survey
  . Five year planning

- Programmatic, e.g.:
  . Personnel
  . Israel experience
  . Synagogue programs

Issues to consider in deciding on the most effective approach for organizing include:

- Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.

- Energizing: Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.

- Priorities: Do the topics represent articulated, or likely, priority areas of the community or the commission.

The time and commitment of top lay leaders to serve as chairs, and the depth of capable professionals to service the task forces are factors to consider in deciding on the number of committees.

II. SELF-STUDY

Rationale

Good information is the foundation of good decision making. In real life, however, we are often required to take action based on incomplete or imperfect knowledge. In planning a community-wide initiative on Jewish education, this is especially true. The self-study -- learning more about the needs, resources, dynamics, and aspirations of the community -- therefore should be an iterative process.

The first phase is oriented toward the first year action plan, what can be learned that will inform decisions and plans for the 1993-94 year. A by-product of the first phase self study is a clearer definition of what is not known that impacts on the critical choices. Delineation of the gaps in information will help frame the second phase of the self-study, a more thorough investigation which will then proceed over the next year and a half to two years.

The basic purpose of the self-study is to provide a baseline for Commission deliberations and establishment of program priorities. It should provide a common foundation of information for Commission members, level the playing field about assumptions (without which participants in the debate are driven to present opinions and perceptions with the force of fact), enlighten even the most knowledgeable insider, and identify the critical issues and choices the Commission needs to address. It also:

- Identifies unserved and underserved needs for Jewish education, as perceived by groups within the community.

- Helps identify critical issues, or choices that will need to be addressed.

- Provides a common base of information to enlighten decisions on critical issues.

- Clarify areas of agreement in moving toward establishing a standard of achievement that is acceptable within the community.

Thinking about programs and priorities later in the process should be based on the best available information on educator needs and potential users of the programs in Jewish education.

8

Elements of Self-Study

A self study of Jewish education in a lead community will have several elements:

(1) A **needs analysis**

(2) A **profile** of the Jewish education enterprise in the community, including information on (see box 6):

- Student participation
- Personnel characteristics
- Program resources
- Financial resources

Needs Analysis

A needs analysis identifies unserved and underserved needs for Jewish education, as perceived by groups within the community.

Educators' Survey: The critical importance of personnel in Jewish education dictates that an educators' survey be an early and major component of the needs analysis. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 4 contains ideas for areas to cover in a survey of Jewish education personnel.

The object from the beginning should be the development of an ongoing database about personnel. Given the scope of desired information on the human Jewish education infrastructure, the educator's survey will surely become increasingly sophisticated in subsequent years.

Make sure to involve educators in the design of the survey. Involving people from the field will improve the quality of the data elements selected, help avoid time and resource consuming efforts to obtain unavailable information, help pave the way when it comes time to collect data, and help mobilize educators to support the overall objectives of the commission.

Summarizing, the initial thinking about the educator's survey should take several factors into account:

- Categories of Information: What information is desired (see Box 4).

- Immediate vs. future round data: Consider ease of availability together with the urgency of need in establishing information sequencing. (See also Box 5, on "Targeting.")

9

• Database: Allow for growth, in number of information fields as well as in number of records.

• Involve educators.

• Select staff or consultants: In selecting staff, or contracting with a consultant, thoroughly review expectations and workplans.

In view of the importance, complexity, and ongoing nature of this aspect of the lead community effort, it may be advisable to convene a special task force (if such a task force was not built into the organizing framework) to oversee this phase of work.

Box 4: Educators' Survey: Suggested Categories for Inventory

• Demographic profile (e.g., sex, age, marital status, address)

• Affiliation preference

• Formal education background (e.g., degrees, Jewish and secular licensure, progress toward National Board licensure)

• In-service staff development (particularly, courses and workshops taken in the community)

• Jewish education experience (e.g., years of experience, present and recent positions, full-time and part-time; camp, other summer and other part-time jobs)

• Secular education positions

• Salary history, in Jewish education

• Inventory of formal and informal expertise (e.g., Judaic/Hebrew; age level specializations; teacher training, resource room management, special education; organizing, supervisory or administrative skills). Classifiable as:

  . Areas of knowledge
  . Skills
  . Special talents

• Attitudinal questions (e.g., Jewish education career intentions; job satisfaction and priority concerns)

Client Groups: With respect to other potential client groups, two important issues should be articulated and addressed up-front:

1. Which sub-groups should be studied?

2. What is the appropriate definition of need?

Targeting: While it would be nice, in theory, to understand the complete quilt of needs for Jewish education in the community, in practice this is not realistic in the time available for taking action. The first step, therefore is to select the key groups, in addition to Jewish education professions, to be the focus of research during the first round.

At a minimum, the needs analysis should address the following categories unless they previously have been studied.

- Early childhood

- Ages 5-13

- Post Bar/Bat Mitzvah

Given limited resources, it may make sense to fine tune the targeting still further by looking at specific age groups in particular program areas, for example, Israel programs for teens.

Box 5: Targeting

Several criteria can be applied in making decisions about what information or which groups to target in the needs analysis.

- **Present knowledge**: How much is already known about the topic or the needs of the group? Has the issue or group previously been studied? Are there significant open questions about what the needs are or how they should be addressed?

- **Priority**: How high a priority is the topic or sub-group with respect to Jewish education? Are the needs of this group for Jewish education a major issue or concern in the community?

- **Feasibility**: What resources of time, effort, money are needed to answer the open questions?

11

Measures of Need: There are three conceptual ways of considering need:

    a. "Market:" Demand by a defined set of people.

    b. "Standard:" An objective measure of how much people require, or, from the community perspective, what is needed to realize a set of aspirations.

    c. "Receptivity:" What people might respond to, i.e. "buy", but cannot articulate because it is not within their past experience.

In designing the needs analysis, you must decide which measure or measures will be most useful for each subgroup. The criteria for targeting will be helpful in narrowing the measures as well. See also Box 6.

Box 6: Selecting the Measure of Need

Here are some other considerations to bear in mind in deciding how to measure need:

• **Market** measures are most appropriate when the institutions of the community are relatively powerless to design incentives or exercise leverage to influence individual choices, other than by improving the programs that are offered.

• Conversely, **standards** will be appropriate when community institutions are in a position to offer incentives or exercise leverage, and has a clear and definable stake in the outcomes of the service area. The caliber and training of professionals is a case in point.

• It is a major undertaking, and perhaps impossible at this time, to define objective standards of how much Jewish education one should have. Similar individuals will vary dramatically in their self-perception of their own need for Jewish education.

• In a needs analysis it is virtually impossible to "measure" **receptivity**, for   example to a charismatic champion. It is possible to examine programs that have been successful elsewhere to expand the vision of decision matters, particularly when it comes time to elicit or develop program strategies. In the context of the needs analysis, it is useful to ponder more ambitious alternatives when the expressed needs aspire to a low level.

Measures of Resources: Potential "needs" should be compared to available resources to identify areas of unmet need or "gaps". At the most basic level, a profile of educational resources should include

- data on the numbers of programs, by type, their capacities and actual enrollments

- data on numbers and characteristics of personnel

- utilization of space

- levels of funding, and

- anticipated changes (including resources in the pipeline, such as new programs being planned or anticipated cutbacks).

Measures of Quality: Ideally, a profile of resources should also incorporate assessments of their *quality*. For example, while a community may appear to have enough supplementary school programs, the more crucial issue is how good are they?

The quality of programs is generally measured by assessment of levels of achievement, or measures of performance. The task in Jewish education is substantially more difficult because of the paucity of satisfactory tests of knowledge or achievement, and the complexity of defining a set of generally acceptable standards. For these reasons, in the short run at least it makes sense to rely on "surrogate" measures of performance. For example, attendance and longevity/dropout statistics can be enlightening as indicators of changes in student performance.

If enrollment or attendance is low, or dropoff at age 13 is high, is it because the prospective students are not out there or because the programs are poorly designed or run? Information on the quality and effectiveness of programs is important for identifying strengths and weaknesses of the existing system, for developing strategies for improvement, and ultimately for establishing a baseline against which the impact of future efforts can be measured.

Regardless, the difficult in measuring quality dictates that in this area especially several iterations of study are necessary. Given the imperative to get underway quickly, we would encourage you to rely on existing information on quality and effectiveness, to the extent possible. Findings and gaps uncovered in one round define the task for the next round.

Generally speaking, three types of measures can be used: (1) input, (2) output or performance, and (3) outcomes. See Box 7 for examples of measures to consider. If you find an absence of information on effectiveness - that, in itself, may suggest that critical issues for the community will be: How should programs be evaluated and against what criteria? What are the characteristics of an excellent educational program? Should there be a process for setting community standards and "accrediting" programs? Should there be an effort to develop community-wide performance indicators and what should they be?

13

Box 7: Illustrative Measures of Quality and Effectiveness

• **Measures of inputs** are generally the easiest to obtain. Examples include: per capita expenditures for various age cohorts and programs, teacher/student ratios, average teacher salaries, per cent of teachers with advanced degrees, lay involvement, number of teachers participating in in-service training, etc. Comparisons can be made to provide perspective on where the community stands in relation to other communities and the nation on key indicators.

• Examples of **output or performance measures** include per cent of eligible population participating in formal and informal Jewish education by age group, levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, etc. Methods of collecting this information include sample surveys, questionnaires to program directors, focus groups (for satisfaction), self-studies by schools, alumni surveys, data collected by a central body such as the Board of Jewish Education or Federation, and information collected in recent Jewish population studies.

• **Outcomes** are the most difficult to measure. It is useful to articulate what these might be, even if the data is not available, because it will be helpful in developing the mission statement later on as well as for suggesting lines of future research. Examples of outcome measures would be self-definition and commitment to Jewish identity, values and practices; evidence of transmission of Jewishness to the next generation; affiliation with synagogues, communal organizations, support of Israel and Jewish institutions, etc.

Benchmarks/Tasks

1. Design Needs Analysis

    a. Focus: Select the primary groups to study.

    b. Measures: Decide on the perspective for measuring the need of each group.

    c. Develop Concept Scheme: Layout decisions on design for discussion with commission.

2. Collect information: on present participation levels. (See Box 8.)

3. Estimate of community need/demand.

4. Gaps [3 minus 2]: A comparison of the market demand for the present programs will give an estimate of the unmet needs: who are the "unserved" or "underserved" groups in the community from the point of view of adult Jewish education?

14

Box 8: Methods

Defining Potential Markets: Four types of information can be used to identify potential user groups:

• Available demographic studies and data: enrollment trends, statistics on personnel involved in Jewish education and communal affairs (e.g., full-time, part-time, turnover, longevity ...), enrollment trends in local day and supplemental school programs (as a predictor of future personnel demands).

• Other national and local studies, commission and planning reports: such as the report of the Commission on Jewish Education in North America, local reports of task forces on Jewish continuity, and strategic planning reports that give insights on trends or external forces that will impact on needs. Experience in other cities can be analyzed for possible relevance. Opportunities for program modification or expansion will be identified where substantial unmet needs are documented and where new revenue opportunities appear to exist.

• Discussion or Focus groups: with selected consumer groups (such as day and supplementary school educators, synagogue lay leaders, students) to gain insights on access barriers as well as desires.

• Questionnaires: attitude surveys of selected sectors of the Jewish community: e.g. about student career interests; motivations for participating in specific program; views of institutional or program strengths or weaknesses; perceptions of their own needs or desires for Jewish education; and past and anticipated involvement in Jewish affairs.

Identify a variety of submarkets. Attempt to estimate the size of each submarket, the extent of the need and the competition.

Profile

1. Develop profile of present Jewish education personnel by drawing on the data from the educator's survey.

   • Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood, camps counselors, JCC program staff, other informal education personnel) by institution/program

   • Skills, expertise and background

15

2. Develop demographic profile of Jewish education needs in the community.

   • Jewish population characteristics: cohort sizes (e.g., early childhood, school age lay leaders, adult education learners, college-age youth, other special groups, like mixed married couples)

3. Analyze program capacities and participation rates (formal and informal programs, by institution/program)

   • Develop a profile of the institutional resources, programs and services presently available in the community. Estimate the capacity of these programs if they are not being fully utilized. (See Box 9 for information to include in a profile.)

Box 9: Elements of an Institution or Program Profile

• Students:
  . Enrollment and graduation trends
  . Age range

• Educators:
  . Numbers of full- and part-time
  . areas of expertise.

• Program components:
  . Subjects
  . Degree(s) offered
  . Activity duration
  . Methods
  . Support resources (e.g. library, training) and services

• Finances
  . Cost per unit of service
  . Revenue and expenditure trends

Deliverables

The end product of the needs analysis and profile is a report that describes for each targeted group:

a. The size of the total potential market.
b. The size of the likely market, "ripest" for Jewish education.
c. The characteristics of the parts of that market ripest for Jewish education.
d. Profile of resources including strengths, weaknesses and major gaps
e. The factors influencing participation.
f. The most appropriate methods for meeting the needs of this group.
g. Who should provide the Jewish education.

17

III. CRITICAL ISSUES

Rationale

In charting future directions, any community faces a number of important policy choices: i.e., critical issues. Early discussions of the planning committee are the first step in identifying the critical issues. The needs assessment and the in depth analysis of program operations through the profile will provide the information needed to sort out and clarify the fundamental decisions.

Deliverables:

- Explicit assumptions

- Formulation of critical issues

- Document summarizing consensus of committee on each critical issue

Benchmarks and Methods

1. <u>Assumptions</u>: In designing the best possible system for coordinating and supporting Jewish education, there will be several fundamental "givens" (e.g., that the school in a congregation is the primary educational vehicle for supplementary education). These assumptions should be made explicit to ensure agreement by the commission. Assumptions on which there is not consensus may well become "issues" which the committee must address. See Box 10 for sample assumptions.

Box 10: Sample Assumptions
1. The primary instrument of supplementary education is the school within a congregation.
2. The delivery system needs to offer an opportunity for balance (creative tension) between community-wide interests and the interests and perspectives of the religious movements (Reform, Conservative, Reconstructionist and Orthodox).
3. Some type of central entity or entities will be needed to support Jewish education in the community.

2.   Critical Issues: The important choices faced by the community in defining the purposes, overall content, and priorities in Jewish education. The planning committee will attempt to reach agreement on what the important questions regarding future investment in Jewish education throughout the community.

It may be useful to classify issues in cascading categories that proceed from more philosophic (i.e., mission) toward more operational (i.e., programmatic or organizational). (See Box 11 for types of issues.)

Box 11: Classification of Issues

1.   Mission-level issues -- i.e. choices relating to the vision, philosophy and the role of the community in initiating or supporting the emerging needs.

2.   Policy issues -- i.e. choices relating to the broad policies relevant to carrying out the community's mission. Some of these choices relate to professional development (e.g. the balance between in-service and pre-service training for pre-school teachers); recruitment (e.g. the balance between new entrants into the field, continuing education, and re-training people from other fields).

3.   Standards and Program Issues -- choices relating to the content and level of programming in Jewish education.

4.   Resource and organization Issues -- i.e. choices relating to the internal capacity of the community to support mission and policies (e.g. the financial resources, agency roles, possible coordinative and integrative mechanisms).

IV. MISSION OR VISION STATEMENT

Rationale

The heart of a strategic plan is a mission (or vision) statement, which should project a clear view of the aspirations of the community. The mission statement should project a the self-image of the community in relation to Jewish education. A good mission statement not only suggests what the community wants to accomplish but what it does not seek to accomplish; at the broadest level, it identifies whom it seeks to serve and how.

Deliverable

A one paragraph to one page Mission Statement

Benchmarks and Methods

Because of its importance, and the difficulty of crafting a good one, the mission statement needs to be the product of substantial analysis and discussion; it should be prepared in the middle of the planning process, not at the beginning.

It should represent the resolution of mission-level critical issues and frame a broad response to the needs assessment. Some parts of the mission statement are not likely to be very controversial; others might be extremely controversial. It is helpful to identify the major options in relation to each critical issue as a framework for the key discussion at which the mission statement gets formulated (see illustration in Box 12 below):

Box 12: Illustrative Mission/Options Chart			
CRITICAL ISSUES	OPTION A	OPTION B	OPTION C
1.0 Community posture on an Israel experience for young people	Community responsibility to insure that every young person has an Israel experience opportunity	Joint community-congregation-family responsibility to insure that every young person has an Israel experience opportunity	Community responsibility to insure that xx% of young people have an Israel experience opportunity
Critical Issue 2.0; etc	Option 2.0A	Option 2.0B	Option 2.0C

20

V. SETTING STRATEGIES AND PRIORITIES

Rationale

The purpose of this part of the planning process is to insure that scarce Jewish communal resources available to Federation and other communal entities for Jewish education are directed to the community's needs and mission. This is accomplished by: selecting effective strategies or policies; setting appropriate priorities.

The policies in the Plan represent resolutions of the critical issues identified above. Resolution of an issue need not strictly adhere to the alternatives that were considered when the issue was defined. It may combine elements of several choices or be an alternative not previously thought of.

Establishing priorities for any community is extremely difficult because of the multiplicity of constituencies and their differing values. A particular educational service may be very important to one group and unimportant to another. The challenge is to develop an approach in which all important views are heard, and then strategies and priorities are developed to insure that the community does not scatter its limited resources.

"Priorities" are seen as judgments about relative importance that <u>inform,</u> not only dollar allocation decisions in the budgeting process, but also decisions about use of non-fiscal resources (such as government relations), and resource development (such as foundation and endowment development).

Deliverables

• List of policy recommendations for the improvement of Jewish education

• Recommended priority rank and desirable sequence for each recommendation

• List of criteria used to select and rank policy recommendations.

Benchmarks and Methods

Good methods of priority analysis inform and support human judgment, but do not try to supplant it; formulas or mechanical weighing or scoring methods are typically not useful.

<u>Options</u> are the items that are ranked in priority-setting. In other words, an "option" is something that is a potential recipient or user of a commission resource. An <u>options</u> structure is an organized, systematic listing of all the possible options. The decision as to what to list as an

21

option is an absolutely crucial one; for once that decision is made, it defines what gets ranked in priority-setting.

A good structure for priority-setting should help decision makers connect broad concerns with specific services or programs -- both those that exist as well as those program or services that do not, but that reflect community concerns.

There are three sources of criteria relevant to setting priorities among options:

- Criteria that are suggested by analyses of community needs. Other things being equal, one would tend to give priority to settings where the total needs are very large (e.g. supplementary schools) or where the gap between existing and needed services is the largest (e.g. in-service education).

- Criteria that derive from the Mission Statement

- Criteria that derive from continental experience in planning for Jewish education

Sample criteria for the selection of effective strategies (policies) and priorities are illustrated in Box 13.

Box 13: Sample Criteria for Selecting Strategies and Priorities

- Support professionalization of principals and teachers -- including incentives for higher levels of education.

- Encourage deeper communal involvement and support of Jewish education.

- Maximize effective utilization of resources (minimize duplication).

- Maximize the opportunity to integrate formal and informal educational techniques (e.g., family shabbatonim; camping + study programs; Israel study programs).

VI. DESIGNING PROGRAMS/PILOT PROJECTS

Expanded, modified, and new programs of course are the most tangible part of the effort to improve Jewish education throughout the community. In the context of a lead community, they are important not just for the promise they hold to improve the enterprise, but also because they can serve as visible demonstrations that help attract larger circles of adherents.

The recent history of Jewish education, as with many other enterprises, contains too many instances of programs being thrown at problems out of a sense of frustration or crisis. Here we hope to shift the emphasis toward the tried, proven and planned. "Best Practices," a CIJE project that is documenting successful programs throughout the continent and organizing them in a variety of categories, should be immensely helpful here. "Best Practice" programs are being classified in six groupings:

- Supplementary schools
- Early childhood Jewish education
- JCCs
- Israel experience
- Day schools
- Jewish camping

We envision programs being launched in two stages: first a few pilot projects to energize the project; and a subsequent series of programs reflecting the vision and priorities of the commission, which may also be phased to reflect funding flows or other factors.

Pilot Projects

A community may wish to launch a small number of pilot programs early in the process to gain visibility for its lead community project, to mobilize the community and create a sense of excitement, and to test ideas about which it has a reasonably high level of confidence of success. Programs selected as pilot should be ones which are likely to be consistent with long term directions, or likely to show reasonably dramatic results in a short period of time. Box 14 contains sample criteria for use in selecting pilot projects.

Selecting pilot projects that address high priority infrastructure needs -- namely personnel and community mobilization -- is another way of helping to ensure the viability of the effort. Sample pilot programs are listed in Box 15.

Box 14: Sample Criteria for Pilot Project Selection

- Improves professional status of teachers, principals, and informal educators

- Promises short-term success and visibility

- Maximizes the opportunity to replicate good results from other communities (e.g., via "Best Practices").

- Promotes multi-agency programming and cooperation

- Maximizes parental involvement

- Strengthens congregations

Box 15: Sample Ideas for Pilot Projects

Personnel

• In-service training for educational leadership -- school principals and JCC program directors.

• In-service training for 2 teachers and 2 informal educators from each institution.

• Summer seminar in Israel for selected educators

Community Mobilization

• Leadership training program for congregational and agency board members.

• A series of public forums on "best practices" and/or the community vision.

Commission Programs

A coherent set of programs should evolve from the commission process, reflecting the vision, strategies, priorities, and recommendations of the commission. A refined set of criteria for program selection should also naturally evolve from those deliberations.

Program Selection: There are several methods for eliciting and selecting program ideas, and working out program implementation details:

- Request for proposal (RFP) process
- Delegate responsibility for specific recommendations to agencies
- Empower task forces as part of commission deliberations.

Box 16 offers suggestions for developing program recommendations which, with some modifications, apply to each of the above selection approaches.

Box 16: Steps in Developing Program Recommendations
• Brainstorm program ideas
• Adapt commission criteria for evaluating ideas
• Compare with other communities
• Test assumptions: define questions and obtain answers
• Confer with users
• Detail program needs, operations and implementation
• Estimate costs
• Set priorities and phasing among program ideas
• Present priorities and justification to Commission

VII. FINANCIAL RESOURCE DEVELOPMENT

Develop a short-term and a long-term strategy for obtaining funding to support Commission initiatives. Obvious potential categories include:

- Annual campaign allocations for local services (either increased amounts or reallocations)

- Creation or expansion of a fund for Jewish education

- Major donors

- Foundations (Jewish oriented, and possibly secular ones also)

Naturally, primary attention will focus on obtaining resources for start-up efforts.

We recommend that fundraising for this effort proceed in a planful way, much like the annual campaign:

1. Package most attractive program ideas

   . Select the most engaging program ideas to showcase
   . Package or repackage programs to be most appealing

2. Identify potential funders in different categories, e.g.:

   . Major donors
   . Medium/large donors
   . Family foundations
   . Community foundations
   . National foundations

3. Match programs to funder interests

4. Identify person/team to make first contact. Consider enlisting Commission members for this role.

5. Follow-up, as appropriate.

VIII. PREPARE FIRST YEAR ACTION PLAN

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

Mandel Institute

מכון מנדל

Tel.   972-2-617 418; 618 728

Fax: 972-2-619 951

אב 4/1/93

Facsimile Transmission

To: JIM MEIER / Jack Ukeles Date: 3/1/93

From: ANNETTE HOCHSTEIN No. Pages: 1

Fax Number: _____

Dear Jim,

Re: second draft of planning document

Thank you for the draft of the planning document -- I have
received it today.

I believe the document needs further development so please hold
additional work until we talk.

Will be in touch,

Best Regards,

Annette

cc: Art Rotman

I