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

Box Folder D-1 1919-1

CIJE reports and planning workshops. Lead Communities correspondence and planning documents, 1991-1992.

Pages from this file are restricted and are not available online. Please contact the American Jewish Archives for more information.

611 Broadway, Suite 505 New York, NY 10012

> Tel: (212) 260-8758 Fax: (212) 260-8760

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Date: 12/26/91

Pages (including cover) 16

To:

ANNETTE HOCHSTEIN

Fax #:

011-972-2-619-951

From:

Uteles Associates In.

If there is a problem with this transmission please call: <u>GAIL</u> at (212) 260-8758.

Message:

[DRAFT #2a]

LEAD COMMUNITIES

A Project of the

Council for Initiatives in Jewish Education

Document #2: GUIDELINES FOR POTENTIAL PARTICIPANTS

The Council for Initiatives in Jewish Education was established as an outgrowth of the Commission on Jewish Education in North America in November 1990. CIJE brings together distinguished educators, professionals, lay leaders and philanthropists of the continental Jewish community. The goal: to change the face of Jewish education in North America.

The Lead Communities Project is intended to demonstrate that it is possible to significantly improve the effectiveness of Jewish education by joining continental and local forces. [Such a venture is unprecedented in Jewish or general education.]

We invite you to apply to become a participant in a bold and visible experiment to create communities of educated Jews to help insure the continuity of the Jewish people.

Morton L. Mandel Chair These guidelines are designed to help communities answer two questions:

- Should we seek to become a lead community?
- How do we apply?



What and Why a Lead Communities Project?

The Lead Communities Project represents a commitment to excellence in Jewish education. The purpose of the Lead Communities Project is to demonstrate that it is possible to significantly improve the effectiveness of Jewish education, both formal and informal, in North America by mobilizing the commitment and energy of local communities. The object is to engage large sectors of the community in deeper levels of learning by providing the right combination of leadership, programs, resources, and planning.

Three to five communities in North America, each with a population of between 15,000 and 300,000 will be invited to join with the Council for Initiatives in Jewish Education in carrying out the Lead Communities Project.

The central thesis of the Lead Communities Project is that the best way to generate positive change at the continental scale is to create improvement "facts" at the community level -- that is, successes that stand as testimony to what is possible.

For the purposes of this project, a "community" is an urban or metropolitan geographic area with a communal organization structure and decision-making system in place.

What is a Lead Community Expected To Do?

A lead community is expected to:

- mobilize stakeholders from all sectors of the Jewish community in improving programs;
- create programs of educational excellence;
- enlist top local leadership representing all aspects of the community;
- commit additional financial resources to Jewish education;
- base its programs on a serious planning effort; and
- show results after several years of intense activity.

In short, a lead community is committed to improving Jewish education and to translating its commitment into action.

CIJE's Role in the Lead Communities Project

CIJE will initiate and coordinate continental supports for the benefit of each lead community, including leadership, financial resources, program and planning expertise. CIJE will work with lead communities to:

- identify funders and obtain financial support;
- replicate successful program ideas and experience through the "Best Practices Project";
- obtain-technical assistance;
- develop links to continental resources agencies (e.g., JESNA, JCC Association, universities, national training institutes, denominational movements);
- develop a monitoring, evaluation and feedback system;
- provide leadership recruitment assistance; and
- convene lead communities for periodic meetings on common concerns.

Who is Eligible

Any central communal entity within a city or metropolitan area (as recognized by the Council of Jewish Federations) with a Jewish population between 15,000 and 300,000 is eligible. This includes any combination of the following:

- A Federation
- A Federation and a central educational agency
- A Federation and a council of congregations
- A community-wide coalition involving Federation, congregations, educational and other institutions

How to Apply

To be considered a potential lead community, a central communal entity should submit a four to seven (4 - 7) page preliminary proposal to the CIJE. This should include:

- A cover letter signed by an authorized representative of the central entity. It should identify a committee to guide the project; indicate the criteria for naming a major communal leader to chair such a committee (or provide a name if a chair has already been identified); and briefly describe the probable size and composition of the projected (or actual) committee. The letter should also address the issue of probable (or actual) professional leadership for the project (e.g. do you contemplate a Lead Community Director?).
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- A 1 or 2 page essay describing the overall approach to educational improvement that your community might use if selected as a lead community. The essay should make the case for why you think that your community would make an outstanding lead community.

Preliminary proposals must be in the CIJE office by _______ 1992. Proposals received after that date cannot be considered.



Review Criteria: Preliminary Proposals

Preliminary Proposals will be assessed to confirm eligibility and evaluated using three criteria:

- Community Preparedness. Is the community positioned to move forward by virtue of its involvement of key institutions and constituencies, leadership, previous planning and improvement efforts in Jewish education?
- Commitment. How clearly and convincingly has the community expressed its commitment to the improvement of Jewish education?
- Vision. How well has the community articulated its view of the content of Jewish education? Does the community have the beginnings of an improvement strategy?

CIJE seeks the best proposals, reflecting a range of regions and types of communities.

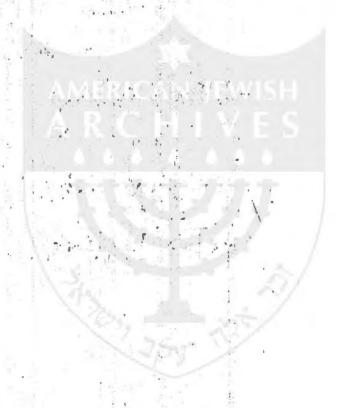
Full Proposals

Proposals (submitted by those communities selected to be finalists) should include the following elements:

- A 2 to 3 page summary description or copies of previously prepared documents that address the current view of the educational needs of the community.
- A 2 to 3 page analysis or copies of previous prepared documents that address the community's capabilities for meeting the commitments outlined in the preliminary proposal.
- A 3 to 5 page description of the strategy that the community would like to use in implementing its vision of Jewish education. This strategy should address the approach to meeting the personnel needs of Jewish education in the community; and the role of the Israel experience. It should address both informal and formal education (including how formal and informal education strategies can be integrated). It should identify priority population groups (e.g. preschool children; pre-bar/bat mitzvah children; post-bar/bat mitzvah students; college age and young adults; and adults and seniors) and educational settings (e.g. supplementary, day school, college/university degree programs).
- A 2 to 3 page description of the anticipated planning process to be used if the community is selected to be a lead community.
- A preliminary projection of the scale or size of the project (e.g. in dollars) and possible local sources of funding.

Review Criteria: Proposals

Full proposals will be evaluated in the same terms as preliminary proposals, but with greater depth on the basis of more substantiation. One additional criterion will be employed: the capacity of the community to carry out its commitment and vision.



Technical Note

Proposals (preliminary and full) should be typed or printed on letter size paper, double-spaced using a full-size type face and normal margins. Please do not submit appendices or supplemental materials to the preliminary proposal. If reviewers need additional information, they will ask for it. Faxed proposals will not be accepted.

[DRAFT #2a]

LEAD COMMUNITIES

A Project of the

Council for Initiatives in Jewish Education

Document #4: TIMETABLE OF THE PROCESS

Month	Benchmark	CIJE Board Role
Mid-January 1992	Approve lead community plan	CIJE Board
End-January	Announce the project & distribute guidelines to local communities ¹	
March	Receive preliminary proposals (4 weeks to prepare)	
April .	Select finalists	Lead Communities Committee) ²
May	Receive finalist proposals (4 weeks to prepare)	
May and June	Visit sites and evaluate finalist proposals	
June	Recommend communities	Lead Communities Committee
June/July	- Select and announce Lead Communities	CIJE Board
August	Hold seminar for Lead Communities	
September	Agree on each CIJE/community joint program; Project begins	
September 1992- July 1993	Lead Communities develop plan and pilot action program	
September 1993	Lead Communities begin full-scale implementation of action program	,

¹Copies of the guidelines will also be circulated to national agencies with local constituents (e.g. religious movements).

²Lead Communities Committee of CIJE Board of Directors.

JAN- 7-92 TUE 10:07 UKELESASSOC

UKELES ASSOCIATES INC. 611 Broadway, Suite 505 New York, NY 10012

> Tel: (212) 260-8758 Fax: (212) 260-8760

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To:	Annette Hochstein Seymour Fox
Fax #:	
From:	Jack Ukales
	If there is a problem with this transmission please call: GAIL at (212) 260-8758.

LEAD COMMU A Project of the Council for Initiatives in Jewish Education Presentation to Senior Policy Advisors

THE LEAD COMMUNITIES PROJECT IS:

- A joint continental-local collaboration for excellence in Jewish education in North America;
- To demonstrate that it <u>is</u> possible to significantly improve the <u>effectiveness</u> of Jewish education with the right combination of:
 - Leadership;
 - Programs;
 - Resources; and
 - o Planning
- Three to five communities.

HP 15033

Charles BWick

GOALS FOR "EFFECTIVENESS" COULD INCLUDE:

- More and better Jewish education programs and services;
- Greater participation in Jewish education;
- Better outcomes related to Jewish:
 - Knowledge;
 - o Skills;
 - o Behaviors; and
 - Values.

AN ELIGIBLE "COMMUNITY" IS:

- Urban or metropolitan geographic area; with
- A Jewish population of between 15,000 and 300,000; and
- A communal organization structure and decision-making system in place. Communal entity could be:
 - o A Federation;
 - A Federation and a central educational agency;
 - A Federation and a council of congregations; or
 - A community-wide coalition involving Federation, congregations, educational and other institutions.

LEAD COMMUNITIES PROJECT PREMISES ABOUT CHANGE:

- Change at continental scale can result from community-level successes.
- Educational reform involves the interaction of school, family and community.
- One must mobilize the entire local community, rather than an individual school, Jewish community center or Jewish camp.

EXPECTATIONS OF A LEAD COMMUNITY:

44	Enlist top local leadership	, representing	all aspects	of the community,
	and including:		•	J -

- Rabbis;
- Educators;
- Communal professionals; and
- Lay leaders.
- Involve all or most educational institutions.

EXPECTATIONS OF A LEAD COMMUNITY (CONT'D):

- Mobilize stakeholders from all sectors of the Jewish community to:
 - create programs of educational excellence;
 - commit substantial additional financial resources to Jewish education;
 - engage in a serious planning effort to support programs; and
 - o show results after several years of intense activity.
- Set high educational standards.

CIJE'S ROLE

CIJE Services:

- Involve continental leadership in the local community:
- Identify funders and help obtain financial support;
- Develop continental resources agencies links (e.g., JESNA, JCCA, universities, national training institutions, denominations);
- Provide expertise in planning and program implementation;
- Provide leadership recruitment assistance; and
- Convene lead communities for ongoing seminars.

■ CIJE Projects:

- "Best Practices Project"; and
- Monitoring, evaluation and feedback system.

THE SELECTION PROCESS

- Step 1 Invite all eligible communities to submit a short preliminary proposal
- Step 2 Review preliminary proposals (using panels of reviewers)
- Step 3 Invite communities with the best preliminary proposals to submit full proposals
- Step 4 Review full proposals, following site visits to each finalist community (using panels of reviewers)
- Step 5 Select lead communities-
- Step 6 Plan lead communities programs
- Step 7 Begin action programs for lead communities

PRELIMINARY PROPOSAL REVIEW (STEP 2)

Preliminary proposals will be assessed to confirm eligibility, and evaluated using three criteria:

- Community Preparedness;
- Commitment; and
- Vision.

CIJE seeks the best proposals, reflecting a range of regions and types of communities.

FULL PROPOSAL REVIEW (STEP 4)

Full proposals will be evaluated using four criteria:

- Community Preparedness;
- Commitment;
- Vision; and
- Community capacity.

THE LEAD COMMUNITIES PLANS WILL INCLUDE: (STEP 6)

- An assessment of the present state of Jewish education in the community;
- An analysis of needs and resources;
- The development of a strategy and priorities;
- The design of programs; and
- The preparation of a multi-year integrated implementation plan.

PROGRAM CONTENT

Lead community plans will address two types of activity:

- Enabling Activities:
 - o Personnel; and
 - Community Support.
- Programmatic Options:
 - o Israel study and travel;
 - o Improved or expanded programs; and
 - o Innovative programs.

SCOPE OF PLANS:

- Comprehensive enough to make an impact on a large segment of the community; and
- Focused enough to insure high standards of excellence.

[Illustrative]

- 3 out of 5 age groups (pre-school; pre-bat/bat mitzvah; post bar/bat mitzvah; college age and young adults and seniors).
- 2 out of 3 education settings (supplementary, day school, college/university degree programs).
- formal <u>and</u> informal programs.

TIMETABLE

Month Benchmark

end Jan Announce the project & distribute guidelines¹

early Mar. Receive preliminary proposals (4 weeks)

Apr Select finalists

May Receive finalist proposals (4 weeks)

Jun Recommend communities

Jun/Jul Select and announce Lead Communities

Aug Hold seminar for Lead Communities

Sept 1992 CIJE/community agree on joint program; Project begins

Sept 1992-Jul 1993 Lead Communities develop plan and pilot action program

Sept 1993 Lead Communities begin full-scale program

¹Copies of the guidelines will also be circulated to national agencies with local constituents (e.g. religious movements)

"Effective" Jewish Education...

- Is an emotionally, intellectually and spiritually compelling experience;
- Inspires one to remain engaged in learning; and
- Leads to deeper commitment to Jewish values.

UKELES ASSOCIATES INC. 611 Broadway, Suite 505 New York, NY 10012

Tel: (212) 260-8758 Fax: (212) 260-8760

FACSIMILE COVER SHEET

Date: 1/3/9	Pages (including cover) <u>25</u>	
To:	Anne-le Hocholein Seymour Fox	
Fax #: From:	Jack Oldes If there is a problem with this transmission please call: GAIL at (212) 260-8758.	
	Tues 10:00 am is fine. Please confirm receipt of fax.	

(Temperary Address):

Honorary Chair Max M. Fisher

Chair Morton I. Mandel

A: ung Director Stephen IT Holfman

Chief Education Officer Dr. Shulamith Effect December 24, 1991

Dear Colleagues:

I look forward to greeting you at the Senior Policy Advisors meeting on January 7th. The agenda will include a report of all of our activities and I am especially pleased that we can report to you on progress on two of our projects. The Best Practices Project directed by Dr. Barry Holtz and the Research Project directed by Dr. Isa Aron are well under way.

The focus of our attention in the months since our last meeting has been the Lead Communities Project, which will be the focal point of our meeting. Dr. Jacob Ukeles has been working with the CIJE staff to launch this ambitious project. The enclosed materials have been prepared by Jack and his associate Dr. Jim Meier.

I hope that you are planning to attend our meeting and that you have let Ginny Levi know of your plans.

If you are not able to attend, I hope that you will review the materials and give me the benefit of your comments (301-230-2012). My work has been informed by the many helpful responses and suggestions I have received from Senior Policy Advisors.

Cordially,

Shulamith R. Elster

DRAFT

LEAD COMMUNITIES

A Project of the

Council for Initiatives in Jewish Education

Document #1:

RATIONALE

January 2, 1992

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

Three to five communities in North America, each with a Jewish population of between 15,000 and 300,000, will be invited to join with the Council for Initiatives in Jewish Education in carrying out the Lead Communities Project.



Why a Lead Communities Project

Improving Effectiveness

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

Jewish education involves not only acquisition of knowledge but also the development of skills, shaping of values and influencing behavior. It can take place in a day school, a supplementary school, summer camp, congregation or Jewish community center; on a trail in the Galilee or in a living room in Iowa. It happens through study of text, a lecture, film, or discussion.

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

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

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

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

"Models" as a Strategy for Positive Change

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

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

Definition of Community

For the purposes of this project, a "community" is an urban or metropolitan geographic area with a communal organization structure and decision-making system in place. The initial focus is on communities with a Jewish population of 15,000 to 300,000¹.

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



¹The 57 communities within this range account for about 3,500,000 out of about 5.5 million Jews nationally. These figures are based on data from the Council of Jewish Federations.

What Makes a Lead Community

A lead community will be characterized by four areas of community commitment: <u>leadership</u>, <u>programs</u>, <u>resources</u>, and <u>planning</u>.

Leadership

A lead community is expected to chart a course that others can follow. The most respected rabbis, educators, professionals and lay leaders will serve on community-wide Steering Committees to guide the project in a specific community. All sectors of the community -- congregations, schools, community centers and Federations -- will need to be involved. Recruiting top community leaders to the cause of Jewish education and involving all sectors of the community will help raise Jewish education to the top of the communal agenda.

Lead community leadership, both professional and lay, also will participate in the ongoing effort to define and refine the project as it is extended to other communities.

Programs

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

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

The report of the Commission on Jewish Education in North America recommends that Lead Communities concentrate on personnel and broadening community support as critical "enabling options." They are necessary for the significant improvement of Jewish education. A promising programmatic option is study and travel in Israel, which has proven to be a very effective motivator for young and old alike. Thus, personnel, community support and educational travel to Israel will be important ingredients in the community's plan of action.

Local initiatives may include improvement or expansion of existing programs or the creation of new ones. Examples of other programs that <u>could</u> be undertaken as part of a Lead Communities program include:

- Replicating good schools and/or establishing model schools;
- Intensifying and improving early childhood programs;
- Designing programs in adult and family education;
- Developing new models of post bar-mitzvah or batmitzvah education;
- Developing strategies for outreach;
- Raising the level of Jewish knowledge of communal leaders;
- Integrating formal and informal education (e.g. camping/study programs); and
- Using new technology (video and computers).

Lead community projects are expected to address both scope and quality: They should be comprehensive enough to make an impact on a large segment of the community; and focused enough to insure high standards of excellence. The report of the Commission on Jewish Education in North America recommends that Lead Communities concentrate on personnel and broadening community support as critical "enabling options." They are necessary for the significant improvement of Jewish education. A promising programmatic option is study and travel in Israel, which has proven to be a very effective motivator for young and old alike. Thus, personnel, community support and educational travel to Israel will be important ingredients in the community's plan of action.

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Financial Resources

A program of breadth, depth and excellence will require new monies, primarily because the endeavor has long been underfunded. The economic recession and substantial resettlement needs make communal fund-raising more challenging. Nevertheless, a lead community will point a direction in this area as well -- substantially upgrading the local investment in Jewish education. Increased funding will come from federations, private foundations, congregations, tuition and other sources.

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

Planning

The plan for each lead community will include: an assessment of the state of Jewish education in the community at the present time; an analysis of needs and resources; the development of a strategy and priorities; the design of programs; and the preparation of a multi-year integrated implementation plan for improving educational effectiveness. CIJE can help focus the resources of national agencies -- JESNA, JCC Association, training institutions, and religious movements -- on the needs of local communities.

How will we know the lead communities have succeeded in creating better outcomes for Jewish education? On what basis will the CIJE encourage other cities to emulate the programs developed in lead communities? Like any innovation, the Lead Communities Project requires evaluation to document its efforts and gauge its success. In addition, each lead community needs to know how well it is doing as a basis for making change along the way. CIJE will design and implement a consistent monitoring, evaluation and feedback system for use in each lead community to help answer these questions.

Lead Communities: A Continental Enterprise

Improving Jewish education throughout the continent is the ultimate goal of the Lead Communities project: to re-energize Jewish education, and to demonstrate and validate successful approaches to Jewish education that can be found in and replicated by communities throughout North America.

DRAFT

LEAD COMMUNITIES

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A Project of the

Council for Initiatives in Jewish Education

Document #2: GUIDELINES FOR POTENTIAL PARTICIPANTS

January 2, 1992

A Message from the Chairman, CIJE

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The Lead Communities Project is intended to demonstrate that it is possible to significantly improve the effectiveness of Jewish education by joining continental and local forces. We invite you to apply to become a participant in a bold and visible experiment to create communities of educated Jews to help insure the continuity of the Jewish people.

Morton L. Mandel Chair questions:

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- obtain professional assistance for planning and action;
- develop links to continental resources agencies (e.g., JESNA, JCC Association, universities, national training institutes, denominational movements);
- develop a monitoring, evaluation and feedback system;
- provide leadership recruitment assistance; and
- convene lead communities for ongoing seminars during the project.

Who is Eligible

Any central communal entity within a city or metropolitan area (as recognized by the Council of Jewish Federations) with a Jewish population between 15,000 and 300,000 is eligible. This includes any combination of the following:

- A Federation
- A Federation and a central educational agency
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- A 1 or 2 page essay describing the overall approach to educational improvement that your community might use if selected as a lead community. The essay should make the case for why you think that your community would make an outstanding lead community.

Preliminary proposals must be in the CIJE office by March 31, 1992. Proposals received after that date cannot be considered.

Review Criteria: Preliminary Proposals

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Full Proposals

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- A 2 to 3 page description of the anticipated planning resources that will be committed if the community is selected to be a lead community.
- A preliminary projection of the scale or size of the project (e.g. in dollars) and possible local sources of funding.

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- A 2 to 3 page summary description or copies of previously prepared documents that address the current view of the educational needs of the community.
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- A 3 to 5 page description of the strategy that the community would like to use in implementing its vision of Jewish education. This strategy should address approaches to meeting the personnel needs of Jewish education in the community; increasing community support; and enhancing the role of the Israel experience. It should address both informal and formal education. It should identify priority population groups (e.g. pre-school children; pre-bar/bat mitzvah children; post-bar/bat mitzvah students; college age and young adults; and adults and seniors) and educational settings (e.g. supplementary, day school, college/university degree programs).
- A 2 to 3 page description of the anticipated planning resources that will be committed if the community is selected to be a lead community.
- A preliminary projection of the scale or size of the project (e.g. in dollars) and possible local sources of funding.

Review Criteria: Full Proposals

Full proposals will be evaluated in the same terms as preliminary proposals, but with greater depth on the basis of more substantiation. One additional criterion will be employed: the capacity of the community to carry out its commitment and vision.

Technical Note

Proposals (preliminary and full) should be typed or printed on letter size paper, double-spaced using a full-size type face and normal margins. Please do not submit appendices or supplemental materials to the preliminary proposal. If reviewers need additional information, they will ask for it. Faxed proposals will not be accepted.

DRAFT

LEAD COMMUNITIES

A Project of the

Council for Initiatives in Jewish Education

Document #3: TIMETABLE OF THE PROCESS

January 2, 1992

The creation of the Lead Communities project will proceed according to the following timetable.

Month	Benchmark	CIJE Board Role
Mid-January 1992	Approve lead communities project plan	CIJE Board
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July	Select and announce Lead Communities	CIJE Board
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November 1992- July 1993	Lead Communities develop plan and pilot action program	
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¹Copies of the guidelines will also be circulated to national agencies with local constituents (e.g. religious movements).

²Lead Communities Committee of CIJE Board of Directors.

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	A Project of the	
Council	for Initiatives in Jewish Education	
Document #1:	RATIONALE	
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Document #1:	RATIONALE	
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The Lead Communities Project is a joint continental - local collaboration for excellence in Jewish education. The purpose is to demonstrate that it is possible to significantly improve Jewish education, both formal and informal, in communities in North America with the right combination of leadership, programs, resources, and planning.

Three to five communities in North America, each with a Jewish population of between 15,000 and 300,000, will be invited to join with the Council for Initiatives in Jewish Education in carrying out the Lead Communities Project.

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Why a Lead Communities Project

Improving Effectiveness

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

Jewish education involves not only acquisition of knowledge but also the development of skills, shaping of values and influencing behavior. It can take place in a day school, a supplementary school, summer camp, congregation or Jewish community center; on a trail in the Galilee or in a living room in Iowa. It happens through study of text, a lecture, film, or discussion.

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

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

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

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

"Models" as a Strategy for Positive Change

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

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

Definition of Community

For the purposes of this project, a "community" is an urban or metropolitan geographic area with a communal organization structure and decision-making system in place. The initial focus is on communities with a Jewish population of 15,000 to 300,000¹.

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

¹The 57 communities within this range account for about 3,500,000 out of about 5.5 million Jews nationally. These figures are based on data from the Council of Jewish Federations.

What Makes a Lead Community

A lead community will be characterized by four areas of community commitment: <u>leadership</u>, <u>programs</u>, <u>resources</u>, and <u>planning</u>.

Leadership

A lead community is expected to chart a course that others can follow. The most respected rabbis, educators, professionals and lay leaders will serve on community-wide Steering Committees to guide the project in a specific community. All sectors of the community -- congregations, schools, community centers and Federations -- will need to be involved. Recruiting top community leaders to the cause of Jewish education and involving all sectors of the community will help raise Jewish education to the top of the communal agenda.

Lead community leadership, both professional and lay, also will participate in the ongoing effort to define and refine the project as it is extended to other communities.

Programs

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

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

The report of the Commission on Jewish Education in North America recommends that Lead Communities concentrate on personnel and broadening community support as critical "enabling options." They are necessary for the significant improvement of Jewish education. A promising programmatic option is study and travel in Israel, which has proven to be a very effective motivator for young and old alike. Thus, personnel, community support and educational travel to Israel will be important ingredients in the community's plan of action.

Local initiatives may include improvement or expansion of existing programs or the creation of new ones. Examples of other programs that <u>could</u> be undertaken as part of a Lead Communities program include:

- Replicating good schools and/or establishing model schools;
- Intensifying and improving early childhood programs;
- Designing programs in adult and family education;
- Developing new models of post par-mitzvah or batmitzvah education;
- Developing strategies for outreach;
- Raising the level of Jewish knowledge of communal leaders;
- Integrating formal and informal education (e.g. camping/study programs); and
- Using new technology (video and computers).

Lead community projects are expected to address both scope and quality: They should be comprehensive enough to make an impact on a large segment of the community; and focused enough to insure high standards of excellence. The report of the Commission on Jewish Education in North America recommends that Lead Communities concentrate on personnel and broadening community support as critical "enabling options." They are necessary for the significant improvement of Jewish education. A promising programmatic option is study and travel in Israel, which has proven to be a very effective motivator for young and old alike. Thus, personnel, community support and educational travel to Israel will be important ingredients in the community's plan of action.

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Financial Resources

A program of breadth, depth and excellence will require new monies, primarily because the endeavor has long been underfunded. The economic recession and substantial resettlement needs make communal fund-raising more challenging. Nevertheless, a lead community will point a direction in this area as well -- substantially upgrading the local investment in Jewish education. Increased funding will come from federations, private foundations, congregations, tuition and other sources.

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

Planning

The plan for each lead community will include: an assessment of the state of Jewish education in the community at the present time; an analysis of needs and resources; the development of a strategy and priorities; the design of programs; and the preparation of a multi-year integrated implementation plan for improving educational effectiveness. CIJE can help focus the resources of national agencies -- JESNA, JCC Association, training institutions, and religious movements -- on the needs of local communities.

How will we know the lead communities have succeeded in creating better outcomes for Jewish education? On what basis will the CIJE encourage other cities to emulate the programs developed in lead communities? Like any innovation, the Lead Communities Project requires evaluation to document its efforts and gauge its success. In addition, each lead community needs to know how well it is doing as a basis for making change along the way. CIJE will design and implement a consistent monitoring, evaluation and feedback system for use in each lead community to help answer these questions.

Lead Communities: A Continental Enterprise

Improving Jewish education throughout the continent is the ultimate goal of the Lead Communities project: to re-energize Jewish education, and to demonstrate and validate successful approaches to Jewish education that can be found in and replicated by communities throughout North America.

DRAFT

LEAD COMMUNITIES

A Project of the

Council for Initiatives in Jewish Education

Document #2: GUIDELINES FOR POTENTIAL PARTICIPANTS

January 2, 1992

A Message from the Chairman, CIJE

The Council for Initiatives in Jewish Education was established as an outgrowth of the Commission on Jewish Education in North America in November 1990. CIJE brings together distinguished educators, professionals, lay leaders and philanthropists of the continental Jewish community.

The Lead Communities Project is intended to demonstrate that it is possible to significantly improve the effectiveness of Jewish education by joining continental and local forces. We invite you to apply to become a participant in a bold and visible experiment to create communities of educated Jews to help insure the continuity of the Jewish people.

Morton L. Mandel Chair questions:

- Should we seek to become a lead community?
- How do we apply?

What and Why a Lead Communities Project?

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

Three to five communities in North America, each with a population of between 15,000 and 300,000 will be invited to join with the Council for Initiatives in Jewish Education in carrying out the Lead Communities Project.

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

For the purposes of this project, a "community" is an urban or metropolitan geographic area with a communal organization structure and decision-making system in place.

What is a Lead Community Expected To Do?

A lead community is expected to:

- enlist top local leadership representing all aspects of the community;
- mobilize stakeholders from all sectors of the Jewish community in improving programs;
- create programs of educational excellence;
- commit additional financial rescurces to Jewish education;
- base its programs on a serious planning effort; and
- show results after several years of intense activity.

In short, a lead community is committed to improving Jewish education and to translating its commitment into action.

CIJE's Role in the Lead Communities Project

CIJE will initiate and coordinate continental supports for the benefit of each lead community, including leadership, financial resources, program and planning expertise. CIJE will work with lead communities to:

- identify funders and help obtain financial support;
- replicate successful program ideas and experience through the "Best Practices Project";
- obtain professional assistance for planning and action;
- develop links to continental resources agencies (e.g., JESNA, JCC Association, universities, national training institutes, denominational movements);
- develop a monitoring, evaluation and feedback system;
- provide leadership recruitment assistance; and
- convene lead communities for ongoing seminars during the project.

Who is Eligible

Any central communal entity within a city or metropolitan area (as recognized by the Council of Jewish Federations) with a Jewish population between 15,000 and 300,000 is eligible. This includes any combination of the following:

- A Federation
- A Federation and a central educational agency
- A Federation and a council of congregations
- A community-wide coalition involving Federation, congregations, educational and other institutions

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- A Federation and a council of congregations
- A community-wide coalition involving Federation, congregations, educational and other institutions

How to Apply

To be considered a potential lead community, a central communal entity should submit a four to seven (4 - 7) page preliminary proposal to the CIJE. This should include:

- A cover letter signed by an authorized representative of the central entity. It should identify a committee to guide the project; indicate the criteria for naming a major communal leader to chair such a committee (or provide a name if a chair has already been identified); and briefly describe the probable size and composition of the projected (or actual) committee. The letter should also address the issue of probable (or actual) professional leadership for the project (e.g. do you contemplate a Lead Community Director?).
- A 1 or 2 page statistical profile including Jewish population; number of individuals receiving various types of Jewish education, both formal and informal; a listing of Jewish educational agencies and programs, both formal and informal; current spending on Jewish education; and the number and type of people involved in Jewish education.
- A 1 or 2 page description of current or recent studies of community needs and resources or plans for Jewish education. Please cite examples of innovative efforts in Jewish education already undertaken in your community.
- A 1 or 2 page essay describing the overall approach to educational improvement that your community might use if selected as a lead community. The essay should make the case for why you think that your community would make an outstanding lead community.

Preliminary proposals must be in the CIJE office by March 31, 1992. Proposals received after that date cannot be considered.

Review Criteria: Preliminary Proposals

Preliminary Proposals will be assessed to confirm eligibility and evaluated using three criteria:

- Community Preparedness. Is the community positioned to move forward by virtue of its involvement of key institutions and constituencies, leadership, previous planning and improvement efforts in Jewish education?
- <u>Commitment.</u> How clearly and convincingly has the community expressed its commitment to the improvement of Jewish education?
- Vision. How well has the community articulated its view of the content of Jewish education? Does the community have the beginnings of an improvement strategy?

CIJE seeks the best proposals, reflecting a range of regions and types of communities.

Full Proposals

Proposals (submitted by those communities selected to be finalists) should include the following elements:

- A 2 to 3 page summary description or copies of previously prepared documents that address the current view of the educational needs of the community.
- A 2 to 3 page analysis or copies of previous prepared documents that address the community's capabilities for meeting the commitments outlined in the preliminary proposal.
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Proposals (preliminary and full) should be typed or printed on letter size paper, double-spaced using a full-size type face and normal margins. Please do not submit appendices or supplemental materials to the preliminary proposal. If reviewers need additional information, they will ask for it. Faxed proposals will not be accepted.

DRAFT

LEAD COMMUNITIES

A Project of the

Council for Initiatives in Jewish Education

Document #3: TIMETABLE OF THE PROCESS

January 2, 1992

The creation of the Lead Communities project will proceed according to the following timetable.

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¹Copies of the guidelines will also be circulated to national agencies with local constituents (e.g. religious movements).

²Lead Communities Committee of CIJE Board of Directors.

UKELES ASSOCIATES INC. 611 Broadway, Suite 505 New York, NY 10012

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FACSIMILE COVER SHEET

Date: 12/20	Pages (including cover) 11
To:	Annella Hoshslein & Seymour Fox
Fax #:	
From:	Gail Tich
	If there is a problem with this transmission please call: <u>GAIL</u> at (212) 260-8758.
Message:	Please give a copy to Mr. Mandal.
	Thank you.

MEMORANDUM

To:

Morton Mandel Stephen Hoffman Seymour Fox Annette Hochstein Virginia Levi

Shulamith Elster

From:

Jim Meier

Date:

December 20, 1991

Re:

Document #1: Rationale

Attached is the second draft of the Rationale for your review. Comments and resulting changes to the Guidelines and the Timetable have been mostly editorial, rather than substantive.

Our present plan is to mail the Rationale, Guidelines, and Timetable by mid next week to the Senior Policy Advisors for the meeting on January 7, 1992. We will meed to receive comments on this latest draft by Monday, December 23. C.O.B. in order to incorporate them in the mailing to the Senior Policy Advisors, Jack will be available Monday if you wish to telephone your comments.

Best wishes for the holiday season.

[DRAFT #2a]

LEAD COMMUNITIES

A Project of the

Council for Initiatives in Jewish Education

Document #1:

RATIONALE

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Three to five communities in North America, each with a population of between 15,000 and 300,000, will be invited to join with the Council for Initiatives in Jewish Education in carrying out the Lead Communities Project.



Why a Lead Communities Project

Improving Effectiveness

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

Jewish education involves not only acquisition of knowledge but also the development of skills, shaping of values and influencing behavior. It can take place in a Yeshiva, Hebrew school, summer camp, congregation or Jewish community center; on a trail in the Galilee or in a living room in Iowa. It can happen through study of text, a lecture, film, discussion or quiet introspection.

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

To achieve this objective, Jewish education must be nurtured, expanded and vastly improved. Both the CIJE and the lead communities will set goals for "improvement." These are likely to take a concrete form, such as:

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

The central thesis of the Lead Communities Project is that the best way to generate positive change on a continental scale is to create visible "facts" at the community level that stand as testimony to what is possible.

"Models" as a Strategy for Positive Change

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

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

What Makes a Lead Community

A lead community will be characterized by four areas of community commitment: <u>leadership</u>, <u>programs</u>, <u>resources</u>, and <u>planning</u>.

Leadership

A lead community is expected to chart a course that others can follow. The most respected local rabbis, educators, professionals and lay leaders will serve on community-wide Steering Committees to guide the project in a specific community. All sectors of the community -- congregations, schools, community centers and Federations -- will need to be involved. Recruiting top community leaders to the cause of Jewish education and involving all sectors of the community will help raise Jewish education to the top of the communal agenda.

Programs

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

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

Definition of Community

For the purposes of this project, a "community" is an urban or metropolitan geographic area with a communal organization structure and decision-making system in place. The initial focus is on communities with a Jewish population of 15,000 to 300,000¹.

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

Of course, there are other kinds of community. For example, it is meaningful to describe all the congregational schools affiliated with the UAHC as a "community"; or to speak of a regional community (a cluster of smaller cities); or a college community; or a community of day high schools in North America. Opening the door to all the different forms of community, or inclusion of the smallest and largest communities would blur the vision of other communities that seek to interpret and replicate results. Perhaps at some future point in the evolution of the lead community concept, different types of community could be considered.

¹The 57 communities within this range account for about 3,500,000 out of about 5.5 million Jews nationally. These figures are based on data from the Council of Jewish Federations.

Continental experience also indicates that investment in personnel and broadening community support are critical "enabling options," that is, they are necessary to create a positive environment for Jewish education; a promising programmatic option is study and travel in Israel, which has proven to be a very effective motivator for young and old alike.

Local initiatives may include improvement or expansion of existing programs or the creation of new ones. Examples of other programs that <u>could</u> be undertaken as part of a Lead Communities program include:

- Setting community-wide standards reflecting common expectations of the "Educated Jew";
- Replicating good schools and/or establishing model schools;
- Designing programs to engage the interest of parents and to reinforce the involvement of children;
- Developing new models of post bar-mitzvah or bar-mitzvah education;
- Developing strategies for outreach;
- Raising the level of Jewish knowledge of communal leaders;
- Integrating formal and informal education (e.g. camping/study programs); and
- Using new technology (video and computers).

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

Financial Resources

A program of breadth, depth and excellence will require new monies, primarily because the endeavor has long been underfunded. The economic recession and substantial resettlement needs make communal fund-raising more challenging. Nevertheless, a lead community will point a direction in this area as well -- substantially upgrading the local investment in Jewish education. Increased funding will come from federations, private foundations, congregations, tuition and other sources.

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

Planning ...

A lead community recognizes that it is time to act but also understands the importance of careful and ongoing planning to inform its actions. A plan for each lead community will involve an assessment of the state of Jewish education in the community at the present time; an analysis of needs and resources; the development of a strategy and priorities; the design of programs; and the preparation of a multi-year integrated implementation plan for improving educational effectiveness. CIJE can help focus the resources of national agencies -- JESNA, JCC Association, training institutions, and religious movements -- on the needs of local communities.

How will we know the lead communities have succeeded in creating better outcomes for Jewish education? On what basis will the CIJE encourage other cities to emulate the programs developed in lead communities? Like any innovation, the Lead Communities Project requires evaluation to document its efforts and gauge its success. In addition, each lead community needs to know how well it is doing as a basis for making change along the way. CIJE will design and implement a consistent monitoring, evaluation and feedback

system for use in each lead community to help answer these questions.

Lead Communities: A Continental Enterprise

Improving Jewish education throughout the continent is the real agenda of the Lead Communities project: to re-energize Jewish education, and to demonstrate and validate successful approaches to Jewish education that can be found in and replicated by communities throughout North America.



--- MEMORANDUM

To:

Shulamith Elster Seymour Fox Annette Hochstein Stephen Hoffman Virginia Levy Morton Mandel

From:

Jim Meier

Date:

December 10, 1991

Enclosed are first drafts of four Lead Communities Project documents that we contemplate comprising the package to be reviewed by the Senior Policy Advisors, and the full CIJE Board:

Document #1.

Rationale

Document #2.

Guidelines for Potential Participants

Document #3.

Selection Criteria

Document #4.

Timetable of the Process

I am enclosing two additional documents that are for internal use only:

Document #5.

Proposed Review Process

Document #6.

CIJE Support/Technical Assistance Structure

It is my understanding that comments, if any, will be forwarded to me by Monday of next week, and that the immediate steps thereafter are as follows:

Edited documents #1-4 forwarded to Ginny Levi
by overeight governor

Dec 17 (Tue)

by overnight courier

□ Documents #1-4 mailed to Senior Policy advisors

Dec 18-19

Documents #1-4 mailed to CIJE Board

early Jan

Meeting with Senior Policy advisors

Jan 7

Meeting of CIJE Board of Directors

Jan 16

I look forward to your comments,



[DRAFT #1]

LEAD COMMUNITIES

A Project of the

Council on Initiatives in Jewish Education

Document #1:

RATIONALE

The purpose of the Lead Communities Project is to demonstrate that it is possible to significantly improve the effectiveness of Jewish education in communities in North America with the right combination of continental and local leadership, programs, resources, and planning. The Lead Communities Project represents a commitment to excellence in Jewish education.

Three to five communities in North America, each with a population of between 15,000 and 300,000, will be invited to join with the Council on Initiatives in Jewish Education in carrying out the Lead Communities Project.

(4)

Why a Lead Communities Project

Improving Effectiveness

The heart of this effort is a commitment to help Jewish education in North America do a better job, or in other words, to improve its effectiveness.

Jewish education involves not only the acquisition of knowledge but the development of skills, and the shaping of values. It can be delivered in a classroom or under a tree, in a living room in Iowa or on a trail in the Galilee. It can happen through film, computer, lecture, discussion or introspection.

The CIJE will define "improvement" for the purposes of the Lead Communities project from a continental perspective; each Lead Community will define "improvement" from a local perspective. While the concept of improving effectiveness is an evolving one, one can anticipate at least 3 types of goals at both the continental and local levels for improving effectiveness:

- Improving the quality and quantity of Jewish education "services" or "products" (e.g. by increasing personnel training levels)
- Increasing participation in Jewish education
- Improving outcomes (related to Jewish knowledge, skills, behaviors, and values)

The central thesis of the Lead Communities Project is that the best way to generate positive change at the continental scale is to create visible "facts" at the scale of community that stand as testimony to what is possible.



"Models" as a Strategy for Positive Change

Positive change will require a vehicle to encourage visionary approaches, and to support innovation and experimentation. Jewish education is an area where the needs are very great and the "answers" few. Trial and error is required to find the new directions that many have called for. Experimentation involves the risk of failure. This project makes it possible to try out a variety of approaches, and prepare the groundwork for adoption and expansion of good ideas elsewhere.

Definition of Community

For the purposes of this project, a "community" is an urban or harmonies geographic area with a communal organization structure and decision-making system in place.

Of course, there are other kinds of community. For example, it is meaningful to describe all the congregational schools affiliated with the UAHC as a "community"; or to speak of a regional community (a cluster of smaller cities); or a college community; or a community of day high schools in North America. Yet, opening the door to all the different forms and variations of community will blur the vision of those who will seek to interpret and replicate results. Perhaps at some future point in the evolution of the lead community concept, more complex models of community should be considered.

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

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A community with fewer than 15,000 Jewish persons is not large enough to have the range of resources and supports, the variety of programs, nor the challenge of coherently integrating the programs and resources that the Lead Communities Project is attempting to demonstrate. Communities with more than 300,000 population are too large and complex to be readily comprehensible as a single unified community. While what is learned from the lead community pilots will be applicable to Jewish population centers of any size throughout the continent, the Lead Communities Project needs time and experience to "get ready" for the smaller and largest communities. The 57 communities within this range account for about 3,500,000 out of about 5.5 million Jews nationally.

¹These figures are based on data from the Council of Jewish Federations.

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What Makes a Lead Community

A Lead Community will be characterized by four elements, each of which has a continental and local dimension: leadership, programs, resources, and planning.

Leadership

A Lead Community is expected to chart a course that others can follow. National experts and lay leaders who have committed themselves to Jewish education will now direct energy on behalf of these 3 to 5 lead communities. The most respected local communal leaders will serve on community-wide Steering Committees to guide the project in a specific community. All sectors of the community will need to be involved. The project cannot belong to any one entity be it congregations, schools and community centers; or Federations. Recruiting top community leaders to the cause of Jewish education and involving all sectors of the community will help raise Jewish education to the top of the community agenda.

Programs

The programs of the lead community need to reflect continental as well as local experience and ideas.

Continental experience indicates that investment in personnel and broadening community support are critical "enabling options," that is, they are necessary for systematic improvement; and study and travel in Israel are among the most promising "programmatic options," Continental experience at a more specific level will flow to lead communities via the "Best Practices Project."²

²The Best Practices Project is a systematic effort to identify the best examples of specific programs, projects or institutions in North America to help the Lead communities in their planning and action phases.

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Local programs may include the expansion of existing programs or the creation of new programs. Examples of programs that could be undertaken as part of a Lead Communities program include:

- Replicating good schools and/or establishing model schools;
- Integrating formal and informal education (e.g. camping/study programs);
- Using new technology (video and computers);
- Designing programs to engage the interest of parents to reinforce the involvement of the children;
- Developing new models of post bar-mitzvah or batmitzvah education;
- Attending to the Jewish education of communal leadership;
- Setting community-wide standards reflecting common expectations of the "Educated Jew"; and
- Developing strategies to reach interfaith couples.

A Lead Communities project is expected to be comprehensive enough to make an impact at the level of the community; and focused enough to insure that standards of excellence are attainable with available resources. It is better to do a few things well rather than many things poorly. Finding the appropriate balance between breadth and depth will require judgment and experience, and is one of things that the lead communities process should help the community to learn.

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Financial Resources

A program of breadth, depth and excellence will require new monies, primarily because the endeavor has long been underfunded. The economic recession and substantial resettlement needs make communal fund-raising difficult. Nevertheless, a lead community will point a direction in this area as well -- substantially upgrading the local investment in Jewish education. Increased funding will come from federations, private foundations, congregations, tuition and other sources.

While CIJE is not a funding source per se, an important part of its role is the mobilization of continental resources to match the financial efforts of local communities.

Planning

A Lead Community recognizes that it is time to act but also understands the importance of intelligent and ongoing planning to inform its actions. A plan for each Lead Community will involve an assessment of the state of Jewish education in the Community at the present time; an analysis of needs and resources; the development of a strategy and priorities; the design of programs; and the preparation of a multi-year integrated implementation plan for improving educational effectiveness. The plan must be prepared by and for the community. CIJE can help with technical assistance, and with access to continental best practices as a way to preview programs before they are incorporated into the plan. CIJE can help focus the resources of national agencies -- JESNA, training institutions, and religious movements -- on the needs of local communities.

In addition to the Plan, each lead community needs a system to monitor, evaluate and make changes along the way. This system has two dimensions: a performance management dimension to support each lead community, and a replication dimension to support the adoption of successful efforts to other communities. CITE will design a tradence of the communities of the death store in the community of the death store in the community of the death store in the communities.

Lead Communities: A Continental Enterprise

The Lead Communities project is not an end unto itself, but one of the methods for improving Jewish education throughout the continent.

This is the real agenda of the Lead Communities project; to re-energize Jewish education throughout North America, and to demonstrate and validate successful approaches to Jewish education that can be found in and replicated by communities throughout the continent.



[DRAFT #1]

LEAD COMMUNITIES

A Project of the

Council on Initiatives in Jewish Education

Document #2: GUIDELINES FOR POTENTIAL PARTICIPANTS

(12)

A Message from the Chairman, CIJE

The Council on Jewish Initiatives in Jewish Education was established in _____, 1990. The Council, an outgrowth of the Council on Jewish Education in North America brings together philanthropists, professionals and lay leaders of the continental Jewish community and distinguished educators. The goal is simple: to change the face of Jewish education in North America.

The Lead Communities Project is intended to demonstrate that it is possible to significantly improve that effectiveness of Jewish education by joining continental and local forces. Such a venture is unprecedented in Jewish communal life or in secular education as well. Lead Communities will be trail-blazers in the art of the possible for Jewish communities throughout the continent.

We invite you to apply to become a participant in a bold and visible experiment to create communities of educated Jews to help insure the continuity of the Jewish people.

Morton L. Mandel

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These guidelines are designed to help communities answer the questions:

- Should we seek to become a lead community?.
- How do we apply?



What and Why a Lead Communities Project?

The purpose of the Lead Communities Project is to demonstrate that it is possible to significantly improve the effectiveness of Jewish education in communities in North America with the right combination of continental and local leadership, programs, resources, and planning. The Lead Communities Project represents a commitment to excellence in Jewish education.

Three to five communities in North America, each with a population of between 15,000 and 300,000 will be invited to join with the Council on Initiatives in Jewish Education in carrying out the Lead Communities Project.

The central thesis of the Lead Communities Project is that the best way to generate positive change at the continental scale is to create improvement "facts" at the scale of community -- that is, successes that stand as testimony to what is possible.

For the purposes of this project, a "community" is an urban or provided geographic area with a communal organization structure and decision-making system in place.

What is a Lead Community Expected To Do?

A Lead Community is expected to mobilize top local leadership representing all sectors of the community. It is expected to create programs of educational excellence. It is expected to commit additional financial resources to Jewish education. It is expected to base its programs on a serious planning effort. It is expected to show results after several years of intense activity.



In short, a lead community is committed to improving Jewish education and to translating its commitment into action.

CIJE's Role in the Lead Communities Project

CIJE mobilizes continental leadership, financial resources, program ideas and experience and planning expertise for the benefit of each lead community. CIJE will not make grants itself; it will facilitate grant-making.

Who is Eligible

Any central communal entity within a city or metropolitan area (as recognized by the Council of Jewish Federations) with a Jewish population between 15,000 and 300,000 is eligible. This includes any of the following:

- A Federation
- A Federation and a central educational agency
- A Federation and a council of congregations
- A community-wide coalition involving Federation,
 Congregations, and educational institutions

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How to Apply

To be considered a potential lead community, a central communal entity should submit a four to seven (4 - 7) page preliminary proposal to the CIJE. This should include:

- A cover letter signed by a responsible representative of the central entity. It should identify a committee to guide the project; name a major communal leader who has agreed to chair such a committee; and briefly describe the probable size and composition of the projected (or actual) committee. The letter should also address the issue of probable (or actual) professional leadership for the project (e.g. do you contemplate a Lead Community Director?).
- A 1 or 2 page essay describing the overall approach to educational improvement that your community might use if selected as a lead community. The essay should make the case for why you think that your community would make an outstanding lead community.
- A 1 or 2 page description of current or recent studies of community needs and resources or plans for Jewish education. Please cite examples of innovative efforts in Jewish education already undertaken in your community.
- A 1 or 2 page statistical profile including Jewish population; number of individuals receiving various types of Jewish education; a listing of Jewish educational agencies and programs; current spending on Jewish education; and the number and type of educators.

Preliminary proposals must be in the CIJE office by ______, 1992. Proposals received after that date cannot be considered because of tight time frame for the review process.

Review Criteria: Preliminary Proposals

Preliminary Proposals will be assessed to confirm eligibility and evaluated using three criteria:

- Community Preparedness. Is the community positioned to move forward by virtue of its leadership, involvement of key institutions and constituencies, previous planning and improvement efforts in Jewish education?
- Commitment. How clearly and convincingly has the community expressed its commitment to the improvement of Jewish education?
- Vision. How well has the community articulated its view of the content of Jewish education? Does the community have the beginnings of an improvement strategy?

CIJE seeks the best proposals, reflecting a range of regions and types of communities.



Full Proposals

Proposals (submitted by those communities selected to be finalists) should include the following elements:

- A 2 to 3 page summary description of the current view of the educational needs of the community.
- A 2 to 3 page analysis of the community's capabilities for meeting the commitments outlined in the preliminary proposal.
- A 3 to 5 page description of the strategy that the community would like to use in implementing its vision of Jewish education. This strategy should address the approach to meeting the personnel needs of Jewish education in the community; and the role of the Israel experience. It should address both informal and formal education (including how formal and informal education strategies can be integrated). It should identify priority population groups (e.g. preschool children; pre-banbat mitzvah children; postbar/bat mitzvah students; college age and young adults; and adults and seniors) and educational settings (e.g. supplementary, day school, college, university degree programs).
- A 2 to 3 page description of the anticipated planning process to be used if the community is selected to be a lead community.
- A preliminary projection of the scale or size of the project (e.g. in \$) and possible local sources of funding.



Review Criteria: Proposals

Full proposals will be evaluated in the same terms as.
preliminary proposals, but with greater depth on the basis of
more substantiation. One additional criterion will be
employed: the capacity of the community to carry out its
commitment and vision.





Technical Note

Proposals (preliminary and full) should be typed or printed on letter size paper, double-spaced using a full-size type face and normal margins. Please do not submit appendices or supplemental materials. If reviewers need additional information, they will ask for it. Faxed proposals will not be accepted.

[DRAFT #1]

LEAD COMMUNITIES

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Document #3:

SELECTION CRITERIA

The aim of the Lead Community selection process is to identify the applicants that have the greatest chance of succeeding at the goal of significantly increasing the effectiveness of Jewish education in their community. These criteria provide measures for the selection process to proceed fairly and impartially. They attempt to identify the structures, capabilities, and other enabling elements necessary for a community to succeed, while providing ample opportunity and flexibility for locally tailored approaches and community inventions.

Each lead community applicant and its proposal will be reviewed in four areas:

- leadership and the depth of community commitment;
- programs;
- financial resources; and
- planning.

These criteria support the two-stage process for selecting lead communities -- that is, 1) using short preliminary proposals to determine whether a community is eligible and as a screening device to identify finalists, and 2) selecting the lead communities based upon the evidence put forward in their full proposals and from site visits to each of the finalist communities.

Preliminary Proposal

Preliminary proposals will be assessed based upon four criteria:

- Eligibility as measured by the size of the Jewish community;
- Community preparedness and leadership;
- Commitment; and
- Vision and "Promise"

Eligibility

The applicant must be the Jewish community for a Jewish population center of 15,000 to 300,000 people. "Jewish community" is defined as residing within an area defined and recognized by the Council of Jewish Federations. Although many kinds of communities exist apart from geographic ones, identifying specialized and unique communities would defeat the replicability objective of the Lead Communities project.

Community Preparedness and Leadership

Is the community positioned to move forward by virtue of its leadership, involvement of key institutions and constituencies, previous planning and improvement efforts in Jewish education? These questions will be evaluated in the following ways:

Representative Committee: A committee composed of lay leaders, rabbis, educators, and other professionals must guide the project. The representativeness, the demonstrated commitment and accomplishment on behalf of Jewish



continuity, and the vision and leadership qualities of the people serving on that committee are more important than sheer numbers of members.

The committee, to be fully identified by the final proposal, may still be in formation when the preliminary proposal is submitted. In this case, an outline of the structure of the committee (e.g. what constituents will be included), and the cover letter to the proposal will be reviewed for credibility about claims of broad community support.

- Communal Leader: A distinguished local communal leader needs to be identified in the preliminary proposal as prospective chair of the lead communities committee. Evidence in the cover letter to the preliminary proposal attesting to the willingness of the prospective chair to serve could substantiate that the claims of the proposal are real. The credentials of the proposed chair will be reviewed.
- Central Address: One or more central communal organizations should be designated as the recipient and contact for lead community transactions. The Federation, the central Jewish educational agency, a congregational council, an ad hoc community-wide entity for Jewish education, are examples of agencies that singly or in combination can be designated as the coordinator of the project.

Proposals will be reviewed for evidence of multi-agency collaboration, in addition to designating the central address.

Planning Capability: Planning is at the heart of the Lead Communities project. Applicants should indicate both past activities and the on-going professional capacity of the community to engage in planning for Jewish education. Past and current activities could include blue ribbon commissions, broad-based studies by boards or committees of community-wide agencies, or professional planning staff. How the applicant intends to strengthen its planning process through the Lead Community project will shed light on its understanding of and commitment to ongoing planning as

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an element in taking action.

Commitment

How clearly and convincingly has the community expressed its commitment to the improvement of Jewish education?

Vision and "Promise"

How well has the community articulated its view of the content of Jewish education? Does the community have the beginnings of an improvement strategy?

The projects and innovative ideas proposed for the first two years, and the added resource supports the applicant expects to direct toward its Jewish education system are to be outlined in an essay that is part of the preliminary proposal. These essays will serve as a window on the ideas and intentions that the applicant would elaborate upon in a full proposal.



Final Proposal

A limited number of applicants will be asked to prepare full proposals that elaborate on the preliminary proposal, lay out details of their first year plans as a lead community, and give evidence of their capacity to carry out their ambitions.

Full proposals will be evaluated in the same terms as preliminary proposals, but with greater depth on the basis of more substantiation. One additional criterion will be employed: the capacity of the community to carry out its commitment and vision. In order to determine the finalist's strength in each of the four areas (leadership, program, financial resources, and planning) the review will consider:

- previous record in Jewish education;
- the depth and breadth of community commitment to improving Jewish education;
- vision and imaginativeness with respect to program and system improvement; and
- promise, that is, evidence of capacity to carry out improvement plans, as expressed by the methods and resources it puts forward.

Leadership and Community Commitment

In the final proposal, the composition of the local lead communities committee should be fairly well identified.

Any unresolved issues regarding the communal leader or the central address should be clarified.

How the applicant proposes to manage the project will also be examined. Will there be a professional director, a staff, and if so, who are the persons proposed to fill these roles?



The final proposal may also elaborate upon the community's past record of collaborative ventures.

Advocacy partnerships, volunteer contributions and other demonstrations of cooperation in Jewish education will help reveal the depth and breadth of community involvement and its ability to work collectively.

Program: Content of Change

There are several content criteria an applicant must satisfy and/or address.

Record of Innovation. The community's record of risk-taking and innovation in Jewish education, including its demonstrated willingness to question conventional approaches and assumptions, will be examined as a measure of its propensity to conceive and carry out creative projects in the future.

Progress with Intransigent Problems. Jewish communities throughout the nation are struggling to find answers to a host of issues such as: sporadic participation, ways of upgrading the profession of Jewish educator, defining minimum standards of performance, attracting new talent to the field, designing programs for children with exceptional needs. The applicant's past successes in tackling tough problems are a measure of its resolve.

Multi-levels of Program Improvement. The lead community project is a wholistic approach to infusing new energy and enthusiasm into Jewish education. Well-conceived programs addressed to specific purposes are the building blocks for improving the system. But just as the vibrancy of Judaism inextricably links the individual and the community, individual programs in isolation in the long run will not succeed. A coherent and comprehensive set of program offerings is the task to be accomplished through this project.

With this in mind, proposals should describe how the applicant plans to address in the first two years of the project at least:

- 3 out of 5 consumer age groups (pre-school; pre-bat/bat mitzvah; post bat/bat mitzvah; college age and young adults; adults and seniors)
- 2 out of 3 education settings (supplementary, day school, college/university degree programs)
- formal <u>and</u> informal programs

Community-wide Governance and Delivery Systems: It is important that the structure of the community's Jewish education system be reconsidered as it facilitates or impedes the development of programs to address longstanding problems in Jewish education.

Building Profession of Jewish educator: Jewish educators are the primary resource available to educate our young people. "The medium is the message" applies to the Jewish education profession. Who we hire to teach our children and how we treat them explicitly signals the importance we attach to the endeavor. Our vision is nothing less than to transform this into a profession one can be proud of, that carries renewed stature in the Jewish community.

At a minimum, applicants must include plans that, starting in year 1, extend and intensify presently available professional development opportunities and/or on-the-job training programs.



Over the course of the project it is expected that proposals will be developed to deal with the more difficult professional issues, such as:

- expanding the capacities and numbers of graduates from training institutions;
- recruiting increasing numbers of qualified personnel;
- raising salaries and benefits of educational personnel;
- developing new career track opportunities; and
- increasing the empowerment of Jewish educators.

Parents and children: The future of the Jewish community will be determined by our children, not by us.

Nevertheless, parents more than teachers or community planners play the essential role in passing on traditions and beliefs.

Just as parents are the path to children, children can be the path to parents. Both sides of this equation should be addressed in the applicant's proposal.

Israel experience: There is considerable evidence that Israel experiences have substantial formative impact on dedication to a Jewish way of life. Study in Israel also intensifies commitment to careers in Jewish education. For these reasons, applicants are required to offer plans to expand opportunities for visits to Israel.



Financial Resources

The revitalization of Jewish education will require a substantial increase in funding. With rare exceptions, communities have not viewed Jewish education as a priority. New interest by private foundations in Jewish education, which will be tapped by this Lead Community project, is an encouraging development. Realistically, however, the major support for Jewish education will have to come from community sources.

The level of funding is a clear and significant measure of commitment. Whether a community is wealthy or not, its level of effort and its decisions on its allocations of available resources are a statement of its values. Past allocations of resources for Jewish education -- per capita measures of wealth, contributions and percentages of available funds allotted to Jewish education -- are to be stated in the proposal.

Plans to increase the level of local support, and/or to modify the distribution of current funds for better results also must be addressed by the applicant. Measures of future financial resource commitment, to be evaluated with an eye toward the balance between ambitiousness and realism, could include:

- increased targets in annual fund drives;
- higher allocations of available funds to Jewish education;
- pledges of support to specific programs.



Planning

Planning is at the heart of the Lead Communities project. Applicant's past activities and the on-going professional capacity of the community to engage in planning for Jewish education will be examined. Past and current activities could include blue ribbon commissions, broad-based studies by boards or committees of community-wide agencies, or professional planning staff. The community's prior planning efforts and how the applicant intends to strengthen its planning process through the Lead Community project will be reviewed against the following specific tasks:

- Assessment of the state of Jewish education in the community. (Includes compilation, analysis and regular updating of demographic, enrollment, personnel resources ad other baseline information.)
- n Needs and resources: methodical determinations of priority needs in Jewish education and analysis of available resources.
- Goal and priority setting: explicit statements about priorities and the strategy for achieving them.
- Multi-year planning: an integrated implementation plan for improving educational effectiveness.
- Monitoring and evaluation: a structure together with the resources necessary to carry it out for assessing whether plans are meeting targets (05/5 g



Application of the Criteria

Panels of experts with broad perspectives, including communal professionals and Jewish educators, will assist CIJE staff and consultants at both phases of the process in screening applicants -- in reviewing proposals and in making finalist site visits.

They will be guided by checklists to determine baseline eligibility, together with rating sheets to evaluate applicants against each criterion.

It is anticipated that proposals initially will be grouped in categories of "YES", "NO", or "MAYBE". Those proposals falling at the margins will be scrutinized more closely using the ratings. Recommendations, strengths, and weaknesses then will be assembled on every proposal for review by the Lead Communities Committee of the CIJE Board.

The Lead Communities Committee of the CIJE Board will select finalists and will prepare a set of recommendations to present for final decision to the full CIJE Board of Directors.

[DRAFT #1]

LEAD COMMUNITIES

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Document #4:

TIMETABLE OF THE PROCESS

The creation of the Lead Communities project will proceed according to the following timetable.

<u>Month</u>	Benchmark	CIJE Board Role
Mid-January 1992	Approve lead community plan	CIJE Board
February-March	Announce the project & distribute guidelines to local communities ¹	
April	Preliminary proposals due (6 weeks to prepare)	
mid-May	Select finalists	Lead Communities Committee) ²
mid-June	Progress report to CIJE Board	CIJE Board mig
early July	Finalist proposals due (6 weeks to prepare)	
late July/August	Site Visits and finalist proposal reviews	
August	Recommend communities	Lead Communities Committee
August/September	Select and anounce Lead Communities	CIJE Board
October	Seminar for Lead Communities	
October/November	Agree on each CIJE/community joint program	
November 1992- July 1993	Lead Communities develop plan and pilot action program	
September 1993	Lead Communities begin full-scale implementation of action program	



¹Copies of the guidelines will also be circulated to national agencies with local constituents (e.g. religious movements).

²Lead Communities Committee of CIJE Board of Directors.

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DOCUMENT #5: PROPOSED REVIEW PROCESS

Introduction

The outline that follows describes a two-stage process for selecting Lead Communities:

- Short preliminary proposals: these are read and discussed by review panels for input into the decisions on finalists; decisions on finalists are made by the Lead Communities Committee of the CIJE Board; and
- 2) Final proposals: evaluation teams read proposals and visit each of the finalist cities; final decisions on lead community selections are made by the full CIJE Board, based on recommendations by its Lead Communities Committee.

The timetable assumes that guidelines, incorporating changes indicated by the CIJE Board of Directors at its mid-January meeting, will be released by the end of February/first of March. Lead community selections will be announced by the end of August.

The process allows:

- 6 weeks for applicants to prepare preliminary proposals
- 5 6 weeks for finalists to prepare final proposals
- o 6 weeks for preliminary proposal review and decisions
- 8 weeks for finalist review and decisions



Release of Guidelines and Preliminary Proposal Preparations

What	Who	When (End date)	How Long
1. Guidelines for proposals released	CIJE staff/consults	Feb 28 (Fri)	
2. Bidders teleconference	CJF Telecon network	March 10	2 hours
3. Review panel members selected and briefed	CIJE staff/consults	March 31	2 - 4 wks
4. Panel review schedule finalized	CIJE staff/consults and panelists	April 6	
5. Preliminary Proposals due	LC Applicants	April 9 (Thur)	6 wks

Preliminary Proposal Review

NOTE:

- Assumes between 15 and 29 respondents to RFP.
- Each of 3 panels will read(0 to 12 proposals.
- Each panel includes 4 people:
 - · 2 educators
 - 1 communal professional/planner
 1 CIJE staff/consultant

CIJE pre-appoints chair.

What	Who	When (End date)	How Long (wks)
1. Checklist review . Notify LC of gaps	CIJE staff/consults	April 14 (Tue)	1/2 week
2. Mail proposals to reviewers	CIJE staff/consults	April 15 (Wed)	Overnight
3. Brief written status report mailed to LC committee of CIJE Board	CIJE staff/consults	April 17 (Fri)	
4. Panel members read proposals	Panelists	April 27 (Mon)	1.5 weeks
5. Members forward score sheets /comments to CIJE for compilation. Includes: . Recommendeds, ranked with concerns/issues	Panelists	April 28	Overnight
. Rejects (with reasons)			
6. CIJE compiles score sheets /comments, and holds tele- conference with each panel	CIJE/Panel	May 6	1 week



What	Who	When (End date)	How Long (wks)
7. CIJE staff ranks proposals and forwards recommendations to LC committee of CIJE Bd	CIJE staff	May 14 (Thur)	1 week Overnight
8. LC committee makes decisions on finalists	LC committee (Team leaders attend as resource)	May 19 (Tues)	
9. Announcements of finalists	CIJE staff/consults	May 21 (Thurs)	



Final Proposal Preparation

What	Who	When (End date)	How Long (wks)
1. Guidelines, forwarded to each finalist	CIJE staff/consults	May 21 (Thur)	2 days
Cite specific gaps, issues, concerns; forward to each finalist	CIJE staff/consults	May 27 (Wed)	1 week
2. Site visit evaluation teams organized & scheduled	CIJE staff	June 15 (Mon)	3.5 weeks
3. Final proposals due	LC finalists	July 2 (Thur)	6 weeks



Final Proposal Review

NOTES:

- Members of review panels for preliminary proposals will serve as core members of site visit teams to Lead Communities finalists.
- Mix and match teams for finalist site visits; site visit evaluators as a rule will visit 2 or 3 sites. Each site evaluation team includes 3 people. At an average of 2 to 3 sites/person means 10-12 people. A CIJE staff person/consultant will serve on each team.
- Others may be added based on specific characteristics or claims of individual finalists.

What	Who	When (End date)	How Long (wks)
A. Proposal Review			
Checklist review Identify gaps, concerns, issues Notify LC of gaps	CIJE staff	July 7 (Tues)	1/2 week
2. Mail proposals with CIJE comments to site evaluation teams	IJE comments to site		Overnight
Site visit protocol included with packet	Core panelists read all materials;	1	
	Other site evaluate review for their su	• ••	
3. Teleconference prior to site visit	Each site visit team	n July 14 (Tues)	1 week

Sec. mg)	A Same		
What	Who	When (End date)	How Long (wks)
B. Site Visits			ARIVE LUNIS
4. Visits to LC finalist sites	Evaluation teams	July 31 (Fri) : :	2 days/each 25 weeks for all
5. Prepare site visit reports (Mostly checklist format) with recommendation C. Deliberations/Decisions	Team Leader	Aug 4 (Tues)	End of visit
6. Core panel review, at CIIE offices Recommendeds, ranked with concerns/issues Rejects (with reasons)	Core panel, CUE staff/consults	Aug 5-6	(2 day review meeting)
7. CIJE compiles recommendations /comments, and forwards to CIJE board	CIJE staff/consults		Overnight
8. LC committee meets to review recommendations	LC committee	Aug 13 (Thur)	
9. Recommendation package forwarded to CIJE Board	CIJE staff/consults	Aug 19 (Wed)	
10. CIJE Board makes final decisions	CIJE board	. Aug 26 (Wed)	
11. Announcements/award notifications	CIJE staff/consults	Aug 31	

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DOCUMENT #6: CIJE SUPPORT/TECHNICAL ASSISTANCE STRUCTURE

Overview

CIJE will initiate and coordinate a continuum of supports of increasing intensity as lead community proposals proceed toward implementation. CIJE expectations of lead communities and its responsibilities to them at each stage of the process following the release of the Guidelines include:

Preliminary Proposals

Guidelines release, Preliminary proposal preparation

- Mail Guidelines packets to target communities, and to anyone who makes an inquiry.
- Respond to questions about Guidelines (policy questions, process requirements). Provide assistance via telephone in response to requests on ad hoc basis.
- Plan, make arrangements and run bidders conference (using CJF satellite hook-up).

Preliminary proposal applications

- Review proposals against checklist for missing pieces.
- Coordinate preliminary proposal review process: compile reviewer comments, serve as intermediary between reviewers and bidders if clarification is necessary, coordinates decision meeting(s), notify finalists and other bidders of disposition of their proposals.
- Provide each finalist with a list of issues/gaps identified by reviewers.

Final Proposals

Final Proposal preparation

- Provide clarification and technical assistance, upon request by a finalist, by telephone (or mail). CIJE's objective is to be as helpful as possible on matters such as: fund-raising linkages, planning suggestions, models to consider.
- Provide on-site technical assistance on an ad hoc basis.

Final proposal review

Organize site visit teams (comprised of senior policy advisors, insiders - known to the bidder community - and outsiders) to evaluate finalist community.



- Teams to include:
 - ✓ Team leader
 - Multi-dimensional experts in diverse areas of planning, formal and informal education, subject areas, lay leader, etc.
- Teams to evaluate:
 - ✓ ∴ Education programs at different levels
 - ✓ Community involvement and financial support
 - ✓ Planning capability
- Compile site visit evaluations and other pertinent information; coordinate final decision process.

 Announce decisions.



Implementation

Implementation, Phase 1: Planning (6 - 12 months)

- Organize seminar, to which all Statists are invited, to lay out CIJE's expectations in areas such as:
 - ✓ quality and standards
 - ✓ planning
 - ✓ best practices
 - ✓ monitoring and evaluation
 - ✓ resource commitments
- Draft LC/CIJE agreements with each community, as result of seminar.
- Prepare/provide planning guidelines for lead communities to follow in undertaking planning during next 6 - 12 months.
- Coordinate on-going communication network; link resources to needs.
- Convene external teams to assist and react to community planning process.
- Link lead communities to best practices project,



Implementation, Phase 2: Action Plan (2nd - 3rd years)

- All of the above, plus..:
- Coordinates technical assistance "support bank". The support bank, linked to the CIJE database of experts in diverse areas of Jewish education, provides a line of credit to each lead community by which it can obtain expert assistance. The currency is hours of service. CIJE staff function as loan officers: they watch each account, approve major requests for services, and may recommend that a lead community avail itself of a particular expert. CIJE must work out:
 - ✓ Bank account/credit for each lead community for use of national experts
 - Areas of expertise within which to identify/contract with experts

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- LC access procedures, and limits on use of support bank"
- ✓ Nature of agreement between CIJE and support bank experts
- Monitoring. Evaluation and Feedback to lead communities. CIJE will develop a bi-partite system for monitoring and evaluating lead community progress, with CIJE and each lead community responsible for carrying out a component of the plan. CIJE will:
 - Define monitoring, data collection and analysis plans to be carried out by each lead community. These plans will address baseline management data needs, reviews of progress on lead community defined objectives, and periodic reporting requirements.



- Develop an independent research and evaluation program to be carried out by CIJE staff and consultants.
- Broker between communities and funders. CIJE will:
 - Contact, cultivate, and maintain an inventory of funders interested in or potentially interested in Jewish education. (Inventory will include information such as: areas of interest/priority, grant size range, contact persons, application procedures).
 - Maintain an active listing of lead community's priorities, needs and strengths.
 - Facilitate contacts between lead communities and funders; alert CIJE board members, senior advisors, and/or others in the CIJE network to intervene with a funder on behalf of a lead community.
 - ✓ Provide technical assistance to a lead community to address a concern of a funder.
- Link continental resource agencies to lead communities.

 CIJE will maintain close contact with continental resource agencies (e.g., JESNA, JCCA, universities and other national training institutions, denominational movements) to:
 - Define one or more specific projects through which each agency will work to support a lead community or several communities.
 - ✓ Develop a resource inventory for use by lead communities in solving specific problems.



- Facilitate connections between lead communities and agencies on issues of mutual interest.
- Provide leadership recruitment assistance.
- Organize periodic plenary activities that convene lead communities around common concerns.



JACOB B. UKELES, Ph.D.

Jacob B. Ukeles is President of Ukeles Associates Inc.

In his 25-year career, Jack Ukeles has served as a senior advisor to cities, non-profit institutions and communal agencies,

He was one of the key players on the team that led New York City out of its fiscal crisis in the mid-seventies, serving first as Executive Director of the Mayor's Management Advisory Board, then as Deputy Director of Operations and next as Deputy Director of the Emergency Financial Control Board. He set up performance-based management control systems for all 30 Mayoral agencies, monitored the City's revenue and expenditure plans and helped achieve substantial workforce reductions -- totalling 60,000 jobs -- with minimal service cutbacks.

In Hartford, Connecticut, Jack directed a citywide management improvement effort that resulted in better public services at lower costs -- \$15 million was gained over 5 years. He has served as a consultant to numerous business organizations, public commissions, elected officials and government agencies in New York, Connecticut, Alaska, Canada and at the U.S. federal level.

In the early eighties, as Executive Director for Community Services of New York's Federation of Jewish Philanthropies, Jack Ukeles managed the allocation of \$45 million annually to a biltion-dollar network of 130 non-profit health and human service agencies. He oversaw completion and planning applications of a major demographic study of the metropolitan area -- the largest Jewish population center outside of Israel. And his efforts were instrumental in guiding Federation from ad hoc to strategic planning, incorporating a new regional perspective.

Author and educator, Jack Ukeles currently serves on the faculty of Columbia University's School of International and Public Affairs. He was founding Chairman of the Graduate Department of Urban Affairs and Policy Analysis of the New School for Social Research and has taught at the University of Pennsylvania, where he also directed the Urban Strategies Project. He is author of the book, Doing More With Less: Turning Public Management Around and numerous articles that have appeared in New York Affairs, Urban Affairs, Perspectives in Jewish Population Research and Viewpoints.

Jack Ukeles was a Fulbright Fellow in India and earned his Masters in City Planning and Ph.D. from the University of Pennsylvania.

He is married to Mierle Laderman Ukeles, an artist. They have three children and live in New York City.

JAMES MEIER, ED.D.

During the past 20 years, Jim Meier's career has oscillated between the theoretical (planning and analysis) and the applied (operational management). He has worked in government, private and non-profit sectors, specializing in finance, education and social services.

Prior to joining UAI, for four and a half years he served as First Deputy Director of the Dudget Office of the New York City Doard of Education, the largest school system in the nation with an annual budget approaching \$7 billion, nearly 1,000 schools, over 100,000 employees and 950,000 students. In addition to supervising a budget office staff of over 100 people), he was responsible for new initiatives with policy implications for the school system.

Jim's link with the Board of Education evolved from a consulting relationship. For seven years as head of his own management consulting firm, his clients included state government, New York City agencies, colleges and universities, non-profit organizations and a Fortune 100 corporation. Among his projects with the New York City Board of Education was revamping the budget request process, resulting in record increases in state and local support -- over \$500 million added to the base budget in two years.

In the area of social services, he conducted seminal management analyses of the New York City Youth Bureau that led to fundamental reforms and reorganizations of that agency, a similar analysis of Special Services for Children, designed a new program for a hospital in comprehensive care for the elderly, and planned and implemented the successful merger of two non-profit organizations serving the elderly blind.

From the mid- to late-1970s, Jim Meier managed the East Harlem Block Schools, a multidimensional community-based organization with an elementary and middle school, two nursery schools, and a college program for parents and staff, affiliated with Bank Street College of Education.

In the early 1970s, Jim prepared a major portion of the report of the Fleischmann Commission, one of the most comprehensive commission studies ever on elementary and secondary education, and still a seminal research document. In the 1980s he served as senior staff to the Governor's Commission on Higher Education and the Economy in Connecticut, all major recommendations from which were enacted by the legislature.

Jim Meier served in the Peace Corps in India, which he revisited in 1970 with a William Kinne Fellowship. He has an undergraduate degree from Williams College, a Master in Urban Planning and a Doctorate in Educational Administration from Columbia University.

He currently lives in New York City with his wife and two children.

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Date: 12/2/	Pages (including cover) 6	
To:	Annette Hockstein	
Fax #: From:	Guil Tieb	
	If there is a problem with this transmission please call: GAIL at (212) 260-8758.	
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DOCUMENT #3. - Proposed Review Process

Audience: CIJE Board and Staff

Length: 2 to 3 pages

Introduction

The outline that follows describes a two-stage process for selecting Lead Communities: 1) short preliminary proposals that are read and discussed by review panels for input into the decisions on finalists; and 2) final V proposals, with site evaluation teams visiting each of the finalist cities.

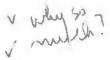
There are 21.5 weeks between February 1 and July 1, the target date for announcement of Lead Community selections. It is essential that site visits be conducted in May/early June at the latest. The proposed process is designed to fit within the time window. To do so requires some compression of decision-making deliberations and considerable pressure to maintain deadlines for every interim step.

The process allows:

4 weeks for each round for applicants to prepare proposals



□ 6 weeks for preliminary proposal review and decisions



8 weeks for finalist review and decisions

Release of RFP and Preliminary Proposal Preparations

What	Who	When (End date)	How Long (wks)
1. RFP released	CIJE staff/consults	Jan. 31	٧
2. Review panel members selected and briefed	CIJE staff/consults	Feb. 18	2 - 4 wks
3. Panel review schedule finalized	CIJE staff/consults and panelists	Feb. 26	
4. Preliminary Proposals due	LC Applicants	Feb. 27	4 wks



Preliminary Proposal Review

NOTE:

Assumes between 15 and 25 respondents to RFP.

Each panel will read 5 to 8 proposals.

■ Each panel includes 4 people:

· 2 educators

· 1 communal professional/planner

· 1 CIJE staff/consultant

CIJE pre-appoints chair.

What	Who	When (End date)	How Long (wks)
Checklist review Notify LC of gaps	CIJE staff/consults	March 5 (Thurs)	1 week
2. Mail Proposals to reviewers	CIJE staff/consults	March 5	Overnight
3. Panel members read proposals	Panelists	March 16 (Mon)	1.5 weeks
4. Members forward score sheets /comments to CIJE for compilation. Includes: . Recommendeds, ranked with concerns/issues . Rejects (with reasons)	Panelists .	March 17	Overnight
5. CIJE compiles score sheets /comments, and holds tele-conference with each panel.	CIJE/Panel	March 24	1 week
 CIJE staff ranks proposals and forwards recommendations to LC sub-committee of CIJE board 	CIJE staff	March 26 (Thurs)	1 week Overnight
7. LC sub-committee makes final decisions	LC sub-com. (Team leaders attend as resource)	March 31 (Tues)	
8. Announcements of finalists	CIJE staff/consults	April 2 (Thurs)	

and to?

What	Who	When (End date)	How Long (wks)
1. Guidelines, forwarded to each finalist.	CIJE staff/consults	April 2	2 days
Site specific gaps, issues, concerns forwarded to each finalist.	CIJE staff/consults	April 7	1 week
2. Site visit evaluation teams organized & scheduled.	CIJE staff	April 28	3.5 weeks
3. Final proposals due	LC finalists	April 30 (Thurs)	4 weeks

Final Proposal Review

NOTES:

- members of review panels for preliminary proposals will serve as core members of site visit teams to Lead Communities finalists.
- Mix and match teams for finalist site visits; site visit evaluators as a rule will visit 2 or 3 sites. Each site evaluation team includes 3 people. At an average of 2 to 3 sites/person means 10-12 people. A CIJE staff person/consultant on each team.
- Others may be added based on specific characteristics or claims of individual finalists.

What	Who	When (End date)	How Long (wks)
A. Proposal Review		. 5/	
Checklist review Identify gaps, concerns, issues Notify LC of gaps	CIJE staff	. May 7 (Thurs)	-1 week
2. Mail proposals with CIJE comments to site evaluation teams.	Mailed by CIJE sta	ff May 7	Overnight

.a	<u> </u>	ر دور در ا	How Long (uks)
What	Who	When (End date)	•
	Core panelists read all materials;	May 14 (Thurs)	1 week
	Other site evaluators review for their sites	;	
3. Teleconference prior to site visit	Each site visit team	May 19 (Tues)	0.5 week
B. Site Visits			
4. Visits to LC finalist sites	3-person teams	June 5 (Fri)	2 days, each 25 weeks for all
5. Prepare site visit reports (Mostly checklist format) with recommendation	Team Leader	June 8 (Mon)	End of visit
C. Deliberations/Decisions			
6. Core panel review, at CIJE offices	Core punel, CUE staff consults	June 9-13	(2 day review meeting)
. Recommendeds, runked with concerns issues . Rejects (with reasons)			
 CIJE compiles recommendations /comments, and forwards to CIJE board. 	s CIJE stoff consults	June 11 (Thurs)	Overnight
8. LC subcommittee reviews recommendations	LC subcommittee	June 15 (Mon)	
9. CIJE Board makes final decisions	CIJE board	June 18 (Thurs)	
10. Announcements/award notifications	CIJE staff/consults	June 24 (Wed)	

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	From:	If there is a problem with this transmission please call: GAIL at (212) 260-8758.
Messa	ige:	Would you mind sharing the agenda & outline?

AGENDA: LEAD COMMUNITIES TELECONFERENCE ELSTER, FOX, LEVY, HOCHSTEIN, HOFFMAN, MEIER, UKELES NOVEMBER 13, 1991

- 1. Continue to review the outline of the Plan for Lead Communities (see attachment)
- 2. Research, Monitoring and Evaluation: Relationship to Lead Communities (debrief on conversation with Adam Gamoran)
- 3. Update on Fox/Hochstein concept paper on Lead Communities

NOTE: NEW MATERIAL INDICATED BY < >.

Outline

[November 8, 1991]

DOCUMENT #1. What and Why Lead Communities? [Rationale]

Audience: CIJE Board; informed and interested publics & critics

Length: 2 to 3 pages

Contents:

Purpose of project: to demonstrate that it <u>is</u> possible to significantly improve < the effectiveness of > Jewish education with the right combination of commitment, leadership, programs, resources, and <planning>.

<CIJE will define "improvement" for the purposes of the Lead Communities project and each community will be asked to define "improvement" as part of its goals beyond minimal levels.>

<CIJE will define common threshold goals for improving effectiveness in five areas:

- a. <u>Increased participation</u>, to be measured as a percentage of population
- b. Longer duration, to be measured by years (or hours) of participation
- c. <u>Improved offerings</u>, to be described by input characteristics (e.g. staff qualifications, curricular developments introduced)
- d. Improved outcomes < related to jew knowledge, skills, behaviors>
- e. <u>Higher standards</u>, and standard clarification, related to quality of experience and outcome

Lead communities will also define improvement, to be superimposed on the CIJE framework in the following ways:

- · Specific objectives/targets within the goal area (e.g. the target populations for increased participation)
- · Alternate ways of measuring improvement
- · Additional goals for improving outcomes (e.g. parent involvement, increased fund-raising, reduced inter-marriage)>
- Value of models as change strategy
 - · Try out visionary approaches
 - · Replicate/adopt good ideas
 - <. Change requires a large enough field need to effect system not just one school>
- Definition of community
 - · Geographic definition of "community" (recognize other kinds of community exist -- e.g. all the day schools with high schools -- non-geographic communities tend to be unique -- defeats replicability objective)
 - · Needs to big enough to have critical mass to support a variety of programs; small enough to be comprehensible as a community. CIJE needs time and experience to "get ready" for the largest communities.

ISSUE: Should CIJE accept regional consortia of smaller or smaller and larger communities? [Raised by Toledo] -- Within sensible geographic limits, perhaps yes?

Definition of "lead": community that will lead in <planning> and implementing core program + additional innovations. Core program includes:

- < A multi-year integrated plan for improving educational effectiveness>
- · Personnel and development of profession
- · Enhancement of community support
- · Israel Experience
- · Use of "best practice"
- < Use of monitoring evaluation & feedback>

DOCUMENT #2. Draft request for proposals (RFP)

Audience: prospective applicants. Mailed to all communities within community size limits + all those who wrote to inquire regardless of community size.

Length: about 10 pages

Contents:

- Overall proposal preparation process
 - PRELIMINARY proposal -- 3 to 5 pages focuses on community's commitments
 - . FINAL proposal -- 10 to 15 pages, focuses on evidence of capacity
 - · Who is eligible to apply -- a central community organization in a community with a Jewish population of between 15,000 and 300,000

<ISSUE: We propose using the CJF classification of communities. Examine consequences of drawing line at 10,000, 15,000, 20,000, or 25,000

SEE ATTACHMENT A: LIST OF CITIES IN NORTH AMERICA>

Background

- . Purpose and nature of lead community project [summary of 1. Rationale]
- · Anticipated number of finalists [6 to 10]
- · Anticipated number of Lead communities [3 to 5]
- Types of support available to a Lead community [summary of 5. CIJE support structure]

- . Commitments inherent in agreeing to participate <in lead community program > (e.g. contractual agreement)
- Typical 3 5 year program (illustrative)
 - · Year I, self study + plan + initial pilot + grant applications
 - · Year 2, learning from best practice, + training + initial program
 - · Year 3-5, full program>

ISSUE: <When, where and how in the process should specific dollar commitment be put on the table?>

- What should be included in a Preliminary Proposal
 - · The Central communal organizational recipient is identified.

ISSUE: Federation only; Federation + central educational agency; or Federation + congregational council; or adhoc community-wide communal entity for Jewish education with Federation, congregations and central educational agency involvement. <(discuss with Zucker, Mandel)>

- <. Lead communities program committee needs to have community wide representation.>
- · A communal leader needs to be identified as prospective chair of the Lead Communities Project <committee>
- The structure of a Lead communities committee (representation, size etc.) needs to be identified
- Basic information about the community -- Jewish population; number of individuals receiving various types of Jewish education; a brief description of Jewish educational agencies and programs; current spending on Jewish education

- * Brief descriptions of current or recent community-wide or other efforts to improve Jewish education
- · Summary of findings of recent studies of community needs and/or resources or plans for Jewish education
- · Sources of local funding for planning and action programs)
- < Essay describing the lead community's intended approach to change, with specific program ideas for improvement>
- What will be included in a Proposal (if selected as a Finalist):
 - Abstract
 - · Community description, needs
 - · Capability statement
 - · Goals and standards
 - · Program elements (re planning and implementation)
 - · Evaluation and information collection
 - Commitments
 - · Budget and personnel
 - · Attachments
- Criteria and proposal review process [summary of Document 3, Selection criteria/rating structure and 4. Proposed review process]
- Evaluation and information structure:
 - . Expectations of LC
 - . Role of CIJE

- Timetable [summary of 6. Timetable for LC project planning and Initiation]
- How to apply



DOCUMENT #3. Proposed review process

Audience: CIJE Board and staff

Length: 2 to 3 pages

Contents:

- Check list for completeness of submission. Procedures for incomplete proposals.>
- Who (e.g. review structures [e.g. review/advisory boards, and/or consultant assessments of specific aspects of proposal, decision committee], role of continental agencies/institutions)
- How (e.g. <rating criteria addressing proposal, site visit, other information and input concerning community:> rating structure; steps in review; decision making process)
- When (detailed timetable)
- Where (e.g. proposer presentations, site visits, and/or committee review and decision meetings)

DOCUMENT #4. Selection criteria/rating structure

Audience: CIJE Selection panel(s)

Length: 2 to 3 pages

Contents:

Criteria for selecting Finalists

- · Eligibility (city size, community leader, representative committee)
- · Core Program checklist (all) <(See "Definition..." under Document 1).>
- At least 3 out of five age groups (pre-school; pre-bar/bat mitzvah; post bat bat mitzvah; college age and young adults; adults and seniots) 2 out of four types of education (supplementary, day school, informal, mixed formal-informal)
- Criteria for assuring representative lead communities
 [these are illustrative]
 - Geography: 1 from Canada; 1 from Northeast; 1 from South;
 1 from Central States; 1 from West/Southwest
 - <POTENTIAL ISSUE: Strict adherence to this framework would require 5 LCs, with no leeway to select 2 from the same category.>
 - + Size: 1 from 15,000 to 25,000 1 from 25,000 to 50,000 1 from 50,000 to 100,000 1 from 100,000+
 - · Wealth: at least one from among communities not considered wealthy
- Criteria for excellence in lead communities Focus is on evidence for:

- · Present capability (assets/programs/track record): Depth and breadth of current programs, systems, practices, and innovations; Involvement and support of the community planning and action capacity
- · Commitment: leadership; human and financial resources; commitment to "core program"
- · Overall quality: imagination and quality of ideas, realism, viability of proposals
- Scoring sheet

DOCUMENT #5. CIJE support/technical assistance structure

Audience: CIJE Board and staff

Length: 2 to 3 pages

Contents:

CIJE will initiate and coordinate a continuum of supports of increasing intensity as lead community proposals proceed toward implementation. CIJE expectations of lead communities, and its responsibilities to them at each stage of the process following the release of the RFP include:

A. RFP release, Preliminary proposal preparation

- · Mails RFP packets to target communities, and to all who make inquiries.
- Responds to questions on RFP (such as policy questions, process requirements).
- . Plans, makes arrangements and runs bidders conference (using CJF satellite hook-up)

B. Preliminary proposal applications

- . Reviews proposals against checklist for missing pieces
- . Coordinates preliminary proposal review process: compiles reviewer comments, serves as intermediary between reviewers and bidders if clarification is necessary, coordinates decision meeting(s), notifies finalists and other bidders of disposition of their proposals.
- · Provides each finalist with a list of issues/gaps identified by reviewers.

C. Final Proposal preparation

· Provides clarification and technical assistance, upon request by a finalist, by telephone (or mail). Short of providing concrete resources or on site TA, object is to be as helpful as possible matters such as: fund-raising linkages, planning suggestions, models to consider.

D. Final proposal review

- · Organizes <u>site visit</u> teams (comprised of senior policy advisors, insiders known to the bidder community and outsiders) to evaluate finalist community.
- · Teams to include:
 - ✓ Team leader
 - ✓ Multi-dimensional experts in diverse areas of planning, formal and informal education, subject areas, lay leader, etc.
 - ✓ Teams to evaluate:
 - ✓ Education programs at different levels
 - ✓ Community involvement and financial support
 - ✓ Planning capability
 - ✓ Loosely modeled after recertification (e.g. middle states) review process.

ISSUE: is it reasonable to expect communities to be able to compile the level of information needed for such a review during the final proposal preparations?

· Compiles site visit evaluations and other pertinent information, coordinates final decision process. Announces decisions.

- E. Implementation, Phase 1: Planning, including Self-Study (6 12 months)
- · Kick-off seminar, to which all finalists are invited
- · Prepares/provides self-study guildelines for lead communities (modeled after recertification review, e.g. middle states)
- · Coordinates on-going communication network, links resources to needs
- · Convenes external teams to review self-studys
- . Link to best practices project
- F. Implementation, Phase 2: Action Plan
- All of the above, plus..:
- Oversees "support bank" structure, e.g.
 - · Bank account/credit for each lead community for use of national experts
 - · Areas of expertise within which to identify/contract with experts
 - · LC access process, and limits on use of, support bank
 - · Nature of agreement between CIJE and support bank experts
 - · Monitors, evaluates and provides feedback to lead communities
 - · Serves as broker between communities and funders
- CIJE Tasks:>

- Outline foundation/funding plan, e.g. contacts, uses
- Define data collection and analysis plan (linked to program monitoring and evaluation)
- Develop plan for and expectations of continental resource agencies
- Concept structure for leadership recruitment assistance
- Outline of plenary activities (i.e. when, where, purpose of meetings convening representatives of LCs)
- CIJE staffing requirements (for facilitation and/or direct TA, support, and oversight)

DOCUMENT #6. Timetable for LC project planning and initiation:

Audience: CIJE Board and staff

Length: 1 page Contents:

Month Benchmark

Mid-January Approval of Lead community plan (CIJE board)

February 1992 RFP released

March Preliminary proposal applications due

April Proposal reviews, selection of finalists

May Final proposals due

May & June . . Site Visits and Proposal reviews

July Final decisions and award notification

August Seminar for lead communities

September Programs begin

CITIES IN NORTH AMERICA WITH A FEDERATION (INCLUDING VOLUNTEER DIRECTED)

Category	City	Jewish Pop	Total Jew Pop	Number of Cities
20,000 to 24,000	•	Jewish rop	84000	4
20,000 10 24,000	Minneapolis, MN	22000	01000	- 3
	North Shore, MA	22000		
	Southern Arizona	20000		
	Vancouver, BC	20000	7	
15,000 to 19,000			208300	12
12,000 10 12,000	Seattle, WA	19500		
	Kansas City, MO	19100		
	Las Vegas, NV	19000		
	Northeastern NY	18500		
	Buffalo, NY	18100		
	Bridgeport, CT	18000		
	Tidewater, VA	18000		
	Rhode Island	17500		
	Atlantic County, NJ	15800		
	Columbus, OH	15000		
		15000		
	Orlando, FL Winnipeg, MAN	14800		
10 000 - 14 000			164700	15
10,000 to 14,000	I and Booch CA	13500		
	Long Beach, CA	13500		
	Ottawa, ONT	13000		
	New Orleans, LA	12500		
	Sacramento, CA	12000		
	Stamford, CT	11300		
	Tampa, FL	11000		
	Springfield, MA	10000		
	Indianapolis, IN	10000		
	Merrimack Valley	10000		
	Worcester, MA	9800		
	Sarasota-Manatee, FL	9600		
	Palm Springs, FL	9500		
	Delaware	9500		
	Pinellas County, FL Westport/Weston/Norwalk/Wilton, CT	9500		
	Treation of the state of the st		152700	22
5,000 to 9,000			132700	, , ,
			154278	58
Under 5,000				
Under 5,000				
VOLUNTEER DI	RECTED		41170	34
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CITIES IN NORTH AMERICA WITH A FEDERATION (INCLUDING VOLUNTEER DIRECTED)

Category	City	Jewish Pop	Total Jew Pop	Number of Cities
Over 300,000			2200900	2
	New York, NY	1700000		
	Los Angeles, CA	500900		
25,000 to 300,000			3234500	41
	Philadelphia, PA	254000		7
	Chicago, IL	248000		
	Miami, FL	226000		
	Boston, MA	200000		
	Washington, DC	165000		
	Toronto, ONT	135000		
	San Francisco, CA	128000		
	Metro West, NJ	121000		
	Ft. Lauderdale, FL	116000		
	Detroit, MI	96000		
	Montreal, PQ	95000		
	Ocean County, NJ	95000		
	Baltimore, MD	94500		
	Orange County, CA	90000		
	Bergen County, NJ	69300		
	Atlanta, GA	67000		
	Cleveland, OII	65000		
	Omaha, NE	65000		
	Palm Beach County, FL	65000		
	Rockland County, NY	50000		
	South Broward, FL	50000		
	St. Louis, MO	53500		
	S Palm Beach County, FL	52000		
	Denver, CO	46000		
	Houston, Tx	45000		
	Phoenix, AZ	45000		
		45000		
	Pittsburgh, PA			
	San Diego, CA	42000 36900		
	Dallas, TX			
	Middlesex County, NJ	35000		
	Oaklind, CA	35000		
	Monmouth County, NJ	33600		
	Central New Jersey	32000		
	San Jose, CA	30700		
	Milwaukce, WI	28000		
	New Haven, CT	28000		
	North New Jersey	28000		
	Southern New Jersey	28000		
	Hartford, CT	26000		
	Cincinnati, OH	25000		
	Rochester, NY	25000		

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PLAN FOR LEAD COMMUNITIES

The draft <u>Plan for Lead Communities</u> is seen as a collection of six documents [+ content paper being prepared by Annette and Seymour?]. The draft plan should be presented to the CIJE Board in January. The following is a proposed outline of the draft Plan.

Outline

[November 1, 1991]

DOCUMENT #1. What and Why Lead Communities? [Rationale]

Audience: CIJE Board; informed and interested publics & critics

Length: 2 to 3 pages

Contents:

Purpose of project: to demonstrate that it is possible to significantly improve Jewish education with the right combination of commitment, leadership, programs and resources

ISSUE: Will CIJE define "improvement" for the purposes of the Lead Communities project or will each community be asked to define "improvement" as part of its goals or both (the former as a standard for the latter)

- Value of models as change strategy
 - · Try out visionary approaches
 - · Replicate/adopt good ideas
- Definition of community
 - · Geographic definition of "community"

 (recognize other kinds of community exist -- e.g. all the day schools with high schools -- non-geographic communities tend to be unique -- defeats replicability objective
 - Needs to big enough to have critical mass to support a variety of programs; small enough to be comprehensible as a community. CIJE needs time and experience to "get ready" for the largest communities.

ISSUE: Should CIJE accept regional consortia of smaller or smaller and larger communities? [Raised by Toledo] -- Within sensible geographic limits, perhaps yes?

- Definition of "lead": community that will lead in implementing core program + additional innovations, core program includes:
 - · Personnel and development of profession
 - · Enhancement of community support
 - · Israel Experience

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· Use of "best practice"

DOCUMENT #2. Draft request for proposals (RFP)

Audience: prospective applicants. Mailed to all communities within community size limits + all those who wrote to inquire regardless of community size.

Length: about 10 pages

Contents:

- Overall proposal preparation process
 - . PRELIMINARY proposal -- 3 to 5 pages focuses on community's commitments
 - . FINAL proposal -- 10 to 15 pages, focuses on evidence of capacity
 - · Who is eligible to apply -- a central community organization in a community with a Jewish population of between 15,000 and 300,000

Background

. Purpose and nature of lead community project [summary of 1. Rationale]

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- · Anticipated number of finalists [6 to 10]
- · Anticipated number of Lead communities [3 to 5]
- Types of support available to a Lead community [summary of 5. CIJE support structure]
- . Commitments inherent in acceptance of grant (e.g. contractual agreements)
- What should be included in a Preliminary Proposal
 - The Central communal organizational recipient is identified-Federation or Federation + central educational agency or Federation + congregational council or adhoc community-wide communal entity for Jewish education with Federation, congregations and central educational agency involvement).
 - · A communal leader needs to be identified as prospective chair of the Lead Communities Project
 - The structure of a Lead communities committee (representation, size etc.) needs to be identified
 - Basic information about the community -- Jewish population; number of individuals receiving various types of Jewish education; a brief description of Jewish educational agencies and programs; current spending on Jewish education
 - · Brief descriptions of current or recent community-wide or other efforts to improve Jewish education
 - · Summary of findings of recent studies of community needs and/or resources or plans for Jewish education

- Probable emphases of program if selected -- e.g. enabling options, age group or type of educational program.
- · Sources of local funding for planning and action programs)
- What will be included in a Proposal (if selected as a Finalist):
 - . Abstract
 - . Community description, needs
 - . Capability statement
 - . Goals and standards
 - . Program elements (re planning and implementation)
 - . Evaluation and information collection
 - . Commitments
 - . Budget and personnel
 - . Attachments
- Criteria and proposal review process [summary of Document
 3. Selection criteria/rating structure and 4. Proposed review process]
- Evaluation and information structure:
 - . Expectations of LC
 - . Role of CIJE
- Timetable [summary of 6. Timetable for LC project planning and Initiation]
- How to apply

DOCUMENT #3. Selection criteria/rating structure

Audience: CIJE Selection panel(s)

Length: 2 to 3 pages

Contents:

- Criteria for selecting Finalists
 - · Eligibility (city size, community leader, representative committee)
 - · Core Program checklist (all)
 - · At least:

3 out of five age groups (pre-school; pre-bar/bat mitzvah; post bar/bat mitzvah; college age and young adults; adults and seniors) 2 out of four types of education (supplementary, day school, informal, mixed formal-informal)

- Criteria for assuring representative lead communities [these are illustrative]
 - · Geography: 1 from Canada; 1 from Northeast; 1 from South; 1 from Central States; 1 from West/Southwest
 - Size: 1 from 15,000 to 25,000 1 from 25,000 to 50,000 1 from 50,000 to 100,000 1 from 100,000+
 - · Wealth: at least one from among communities not considered wealthy
- Criteria for excellence in lead communities Focus is on evidence for:
 - Present capability (assets/programs/track record):
 Depth and breadth of current programs, systems, practices, and innovations; Involvement and support of the community planning and action capacity

- · Commitment: leadership; human and financial resources; commitment to "core program"
- · Overall quality: imagination and quality of ideas realism, viability of proposals
- Scoring sheet

DOCUMENT #4. Proposed review process

Audience: CIJE Board and staff

Length: 2 to 3 pages

Contents:

- Who (e.g. review structures [e.g. review/advisory boards, and/or consultant assessments of specific aspects of proposal, decision committee], role of continental agencies/institutions)
- How (e.g. rating structure, steps in review, decision making process)
- When (detailed timetable)
- Where (e.g. proposer presentations, site visits, and/or committee review and decision meetings)

DOCUMENT #5. CIJE support/technical assistance structure

Audience: CIJE Board and staff

Length: 2 to 3 pages

Contents:

- CIJE staffing requirements (for facilitation and/or direct TA, support, and oversight)
- Best practices operation

- Define "support bank" structure, e.g.
 - · Areas of expertise within which to identify/contract with experts
 - · LC access process, and limits on use of, support bank
 - · Nature of agreement between CIJE and support bank experts
- Outline foundation/funding plan, e.g. contacts, uses
- Define data collection and analysis plan (linked to program monitoring and evaluation)
- Develop plan for and expectations of continental resource agencies
- Concept structure for leadership recruitment assistance
- Outline of plenary activities (i.e. when, where, purpose of meetings convening representatives of LCs)

DOCUMENT #6. Timetable for LC project planning and initiation:

Audience: CIJE Board and staff

Length: 1 page

Contents:

Month Benchmark

Mid-January Approval of Lead community plan (CIJE board)

February 1992 RFP released

March Preliminary proposal applications due

April Proposal reviews, selection of finalists

May Final proposals due

May & June Site Visits and Proposal reviews

July Final decisions and award notification

August Seminar for lead communities

September Programs begin

SEP-26-91 THU 17:39 以Ķ馬上見名やもむで行い。この NEW YORK, NY 10012 (212) 250-8758 (212) 260-3760 fax

PACSIMILL COVER SHEET

Date:	9/25/97 Pages (including cover)
То:	NameFex
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From:	Name Jaicle Lizee
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UKBLES ASSOCIATES INC THE CABLE BUILDING 611 BROADWAY NEW YORK, NY 10012 Tall (212) 260-8754 Fax: (212) 260-8760

September 25, 1991

Stephen Hoffman Jewish Community Federation of Cleveland 1750 Euclid Avenue Cleveland, OH 44115

Re: CIJE Lead Community

Dear Steve,

I am enclosing a proposal outline for the lead community study. It lists what we will produce, our timetable for proceeding in the planning of the "Lead Communities" project and a budget.

While the particular questions and issues we discussed at our meeting on Friday are not specified in the proposal outline, please be assured that they will be addressed in our work on the deliverables.

We are excited about this project and look forward to beginning work as soon as possible so as to maintain the schedule.

Very truly yours,

Acob B. Ukeles

President

JBU/ggt

enclosures

cc: Annette Hochstein Shulamith Elster Seymour Fox

PROPOSAL FOR PREPARING A PLAN FOR CIJE LEAD COMMUNITY

I. ELEMENTS OF THE PLAN

- A. Introduction: Rationale for Lead Communities
- B. Draft RFP
- C. Proposed Review Process
- D. Recommended Selection Criteria/Rating Structure
- E. Proposed Description of CIJE Support/TA Structure

II. TIMETABLE

A.	Task Proposal	For Review By Steering Committee	Date October 2, 1991
В.	Start		October 7, 1991
C,	Outline of Issues	Steering Committee	October 14, 1991
D.	First Draft	Steering Committee [GA]	November 14, 1991
E.	Draft Plan	Meeting of Policy Advisory Committee	December 15, 1991
F.	Plan	Meeting of CIJE Board	January 14, 1991

III. STAFFING

- A. Jacob B. Ukeles (resume attached)
- B. James Meier (resume attached)
- C. Other Associates as needed

JAMES MEIER, ED.D.

During the past 20 years, Jim Meier's career has oscillated between the theoretical (planning and analysis) and the applied (operational management). He has worked in government, private and non-profit sectors, specializing in finance, education and social services.

Prior to joining UAI, for four and a half years he served as First Deputy Director of the Dudget Office of the New York City Board of Education, the largest school system in the nation with an annual budget approaching \$7 billion, nearly 1,000 schools, over 100,000 employees and 950,000 students. In addition to supervising a budget office staff of over 100 people), he was responsible for new initiatives with policy implications for the school system.

Jim's link with the Board of Education evolved from a consulting relationship. For seven years as head of his own management consulting firm, his clients included state government, New York City agencies, colleges and universities, non-profit organizations and a Fortune 100 corporation. Among his projects with the New York City Board of Education was revamping the budget request process, resulting in record increases in state and local support -- over \$500 million added to the base budget in two years.

In the area of social services, he conduct City Youth Bureau that led to fundamen similar analysis of Special Services for C comprehensive care for the ederly, and two non-profit organizations serving the

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yses of the New York is of that agency, a gram for a hospital in successful merger of

From the mid- to late-1970s, Jim Meier managed and Linia lock Schools, a multi-dimensional community-based organization with an elementary and middle school, two nursery schools, and a college program for parents and staff, affiliated with Bank Street College of Education.

In the early 1970s, Jim prepared a major portion of the report of the Fleischmann Commission, one of the most comprehensive commission studies ever on elementary and secondary education, and still a seminal research document. In the 1980s he served as senior staff to the Governor's Commission on Higher Education and the Economy in Connecticut, all major recommendations from which were enacted by the legislature.

Jim Meier served in the Peace Corps in India, which he revisited in 1970 with a William Kinne Fellowship. He has an undergraduate degree from Williams College, a Master in Urban Planning and a Doctorate in Educational Administration from Columbia University.

He currently lives in New York City with his wife and two children.

JACOB B. UKELES, PH.D.

Jacob B. Ukeles is President of Ukeles Associates Inc.

In his 25-year career, Jack Ukeles has served as a senior advisor to cities, non-profit institutions and communal agencies.

He was one of the key players on the team that led New York City out of its fiscal crisis in the mid-seventies, serving first as Executive Director of the Mayor's Management Advisory Board, then as Deputy Director of Operations and next as Deputy Director of the Emergency Financial Control Board. He set up performance-based management control systems for all 30 Mayoral agencies, monitored the City's revenue and expenditure plans and helped achieve substantial workforce reductions -- totalling 60,000 jobs -- with minimal service cutbacks.

In Hartford, Connecticut, Jack directed a citywide management improvement effort that resulted in better public services at lower costs -- \$15 million was gained over 5 years. He has served as a consultant to numerous business organizations, public commissions, elected officials and government agencies in New York, Connecticut, Alaska, Canada and at the U.S. federal level.

In the early eighties, as Executive Director for Community Services of New York's Federation of Jewish Philanthropies, Jack Ukeles managed the allocation of \$45 million annually to a billion-dollar network of 130 non-profit health and human service agencies. He oversaw completion and planning applications of a major demographic study of the metropolitan area -- the largest Jewish population center butside of Israel. And his efforts were instrumental in guiding Federation from ad hoc to strategic planning, incorporating a new regional perspective.

Author and educator, Jack Ukeles currently serves on the faculty of Columbia University's School of International and Public Affairs. He was founding Chairman of the Graduate Department of Urban Affairs and Policy Analysis of the New School for Social Research and has taught at the University of Pennsylvania, where he also directed the Urban Strategies Project. He is author of the book, Doing More With Less: Turning Public Management Around and numerous articles that have appeared in New York Affairs, Urban Affairs, Perspectives in Jewish Population Research and Viewpoints.

Jack Ukeles was a Fulbright Fellow in India and earned his Masters in City Planning and Ph.D. from the University of Pennsylvania.

He is married to Mierle Laderman Ukeles, an artist. They have three children and live in New York City.



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

To: Annette Hochstein
At FAX Number: Maydel Institute
From: BARRY HOLTZ
Date: Jan 20
Total pages including this one: 20
Apre is the memo I prepared for my meeting
with Seymour & Eags ago.
I hole you are well.
Best wishes,
Bury

*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.

earlier memo should be taken seriously: best practice may be a misnomer; we are really talking about good practice or even "good enough" practice.

One of the important issues that emerged out of the meeting was the discussion of whether one could find best practice in a school that was not a "good" school. Are we looking for examples of good programs or examples of structures or systems in supplementary schools/synagogues. By and large the group strongly took the view that best practice is a term that should refer to examples of successful supplementary school and that therefore the whole system of the school— its personnel, its leadership, its commitments to inservice education, its working relations, and its connection to the synagogue in which it is housed— is a major, if not the major factor in identifying an example for our inventory.

Some of this follows in the line of Joe Reimer's Commission paper. For our meeting, Joe wrote a memc (appended here) which spells these ideas out in some detail and which I think will be very useful in helping to identify our sites. He provides almost a check list of what we might want to keep our eyes on.

However, our group also wanted to recognize the fact that examples of good programming—some of which might be very "translateable" to a Lead Community—existed schools that we might not deem "good". (For example, the supplementary school that runs a wonderful tzedakah program, but has lots of other problems in dealing with Jewish knowledge or content.) We would like such examples to appear in our inventory. Thus our "location finders" would be asked to locate examples of best practice in the school—wide sense and good programs in the localized sense we're using it here.

The four relationships described in Joe Reimer's 12/22/91 memo to me (Barry) can help serve as an overall picture to help guide our work. Here are some specifics that came out of our meeting that can help pinpoint things even more:

- A "best practice" supplementary school should be a place: [Systemic Issues]
 - --with well articulated educational and "Jewish" goals
 - --where stakeholders (such as parents, teachers,
 - laypeople) are involved in the articulation or at least the validation, of these goals in an ongoing way
 - --with shared communication and an ongoing vision
 - --where one feels good to be there and kids enjoy learn-
 - --where kids continue their Jewish education after Bar/Bat Mitzvah

[Curriculum and Instruction]

- --which takes curriculum seriously and has a serious, well-defined curriculum
- --and in which, therefore, kids are learning real "content"
- --in which one sees interesting and "strong" teaching

[Supervision]

- --which engages in regular serious inservice education and/or supervision of teachers
- --with an effective principal who serves as a true educational leader
- --with family or parent education programs

The group recognized that not every one of these items would be in place in every school. In that case we would have an "ideal" school and that, of course, is not our agenda here. But some significant constellation of the above should be in place for a school to make it on to the inventory.

Finally, it was our sense that we do not need to find hundreds of examples of good supplementary schools. Even a dozen would help advance the cause of the Lead Community Project immensely.

In addition our group defined certain specific Program areas that are worthy of particular attention. These may be part of a "good school" or they may be "stand-alone" examples that could also be of use to the Best Practices Project in the manner discussed above.

- --Teaching Hebrew
- --Teaching Israel
- --Bar and Bat Mitzvah programs
- -- Successful post-Bar and Bat mitzvah programs
- -- Family education Programs
- --Junior congregation programs

III. On going questions

I consider this part of this report to be particularly important because these are the questions that have been raised about the Best Practices Project which I believe need to be addressed. Some are my own; others were raised in various discussions.

1) At the Senior Policy Advisers the question was raised: was the group of advisers that I assembled in December, admirable though it might be, too "academic" and did I need to run a similar meeting for a group of practitioners in the field (i.e. principals or teachers) about the question of what is success or what is good practice?

Holtz--5

2) What do we do about the fact that some examples of best practice have to do with the talents, charisma or whatever of particular teachers or principals and may not be transferable?

- 3) What do we do about the fact that there is an amazing amount of flux in Jewish education and that a place that today we might consider an example of best practice, next year or at the time that the Lead Communities gear up, may not?
- 4) What level of documentation do we need in order to make this whole project actually useful for the Lead Communities? This question has come up over and over again and I am still quite concerned about it. When we designate a place as an example of best practice, how much will that help the Lead Community, if it doesn't somehow get the story of that place told to it and in some detail? This is particularly true because we seem to be moving more and more toward a sense that best practice equals a system, not a particular program or "trick" that one can copy with ease.
- 5) And, of course, this question raises again the issue of replicability or "translating" from best practice to the Lead Community. What ultimately is the purpose of this project: to prove that somewhere, at least, good practice exists or to actually get communities to be able to adopt these examples of best practice? If it's the latter, how is this to happen?
- 6) And if the examples of best practice are those which really represent either synagogue's or community's high level policy/ies, how is that translated, explained or implemented in the Lead Community.
- 7) Isn't what we are looking for a large-scale <u>integrated</u> example of policies, not little bits and pieces? And how will the project really pick that up?
- 8) Finally, every time I speak about this the question of "Best Practices Is not Enough" continues to come up. I raised this in my original memos when I talked about the Department of Dreams, but it's not just me. Shulman discussed it at the GA, the Senior Policy Advisers people raised it too. We really need New Practices, because people believe that the situation of Jewish education is such that introducing Best Practices is really not enough. So— whose area is this? Mine? Someone else's? How is this handled?

IV. Next Steps

I will now draft a letter to the original group based on the summary of the meeting above and follow-up conversations with the CIJE staff. A second letter will go to the Senior Policy Advisers.

They will be asked to come up with examples of best practice and good programs, and depending on what we decide, to document this in the appropriate fashion.

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Brandeis University

Philip W. Lown School of No a East circuma Indae Studies Benjanen S. Hornstein Program in Jowesh Communic Percei Walthum, Massac meets 02254-9440 n (7-7αα-1990 ΓΑΝ - 17-70(-2971

12/22/91

Dr. Barry Holtz Melton Research Center 3080 Broadway New York, N.Y. 10027

Dear Barry:

Following our recent phone conversation I want to use this letter for two purposes: to review the criteria for describing the good synagogue school that appeared in my Commission paper and to reflect from my current perspective on those criteria. On the basis of my further research and presentation of these ideas in several forum of educators and rabbis, I have a better sense of the complexity of "best practice" within the "good synagogue school."

I find it useful to think of four relationships as being key to describing the good synagogue school:

(1) the relationship between the synagogue leadership and the school, (2) the school leadership and the teachers, (3) the teachers and the students, (4) the synagogue/school and the parents. Each relationship is both mutual and complex, but taken as a whole I believe they define the health of the educational enterprise. This model may allow one to study a given synagogue and its school to assess points of strength and weakness in the whole system.

1. The Relationship Between the Synagoue and School

My continued research and especially my presentation of these ideas to educators and rabbis has strengthened the original hypothesis that to understand how the supplementary school operates, look first to its location within the host congregation. What my first informants told me has been repeated many times: education in the synagogue always goes on within the context of the congregational politic; the rabbi is one party with political influence; the synagogue lay leaders are more likely to place the educational agenda at the top of their priority list if the rabbi strongly and effectively pushes that agenda. The rabbi alone cannot make the support happen, but when the support is potentially there in the lay body, the rabbi can make the difference as to how high a priority it consistently remains on the congregational agenda.

This early formulation of mine has undergone two basic revisions in more recent thinking. First I underestimated how volatile support for the school's agenda can be within the congregation. Second, I underestimated how active a role the school principal may play within the congregational politic.

There are so many factors that play in a given congregation as to how the school's agenda or budget will fare. It is simplistic to think of a congregation as being "supportive" or "non-supportive" of the educational agenda. One has to look at the demographic and the economic pictures, the committee system

within the congregation, the role of parents and the relative influence of day schools within the area. There can be a economically-strong congregation in which parents of school age children are powerful players in the leadership, but where there is a split between day and supplementary school parents. There can be a congregation to which day school education is irrelevant, but where influential parents simply do not understand why their children need 3 days a week of Jewish education. In each of these cases there needs to be an articulate and politically-active voice that can effectively make the case for the supplementary school.

I assumed that voice had to be the rabbi's. While I still believe his voice is crucial - with more to add below - I now see the principal can also be a significant player. The principal may choose to work through the rabbi and the school committee, but she has to know the ropes if the support is to materialize. I have learned that the new or politically inexperienced principal is at a major disadvantage if she cannot call upon established relationships with key leaders in the congregation at times when the school needs friendly advice and support.

But this current formulation errs too much on the side of practicality. If synagogues are eternally rife with politics, they remain symbolically sensitive institutions. I have seen one principal who worked very closely with an impressive school committee to teach the members - who were mostly parents - the symbolic value of Hebrew to both the school curriculum and the

synagogue service. Sure he did it to gain their political support, but the relationship between educator and parents had a highly spiritual side to it. He was their teacher as well as their comrade-in-arms.

Sara Lee put this very beautifully in a conversation. " You need a cultural leadership [in the synagogue] that rehearses the central values through myth and ritual." Here the clergy re-enter the picture. They need do more than offer their political support to the school. They need to find ways to make Jewish learning central to the mission of the synagogue. That involves adult and family education, the use of services for educational purpose, the symbolic and actual invovlement of the clergy in the children's education, and the creation of rituals for honoring both the teachers and students of Torah. I could write a whole megillah on this topic alone, but will end by saying that the location of the school in the synagogue has much to do with the place of Jewish study in the congregational value system. It is much harder to sell the value of quality Jewish education to an adult congregation that has not itself had the experience of learning Torah from a devoted and valued teacher.

The Relationship between the Principal and Teachers

"No matter how supportive the rabbi is, without a principal to make it happen, the school will fall flat," Joy Wasserman told me at the CAJE consultation in Cleveland. I've come to see that she is right.

As the only full-time educator on the synagogue staff, the school principal plays a host of crucial roles that I cannot here enumerate. Rather, I wish to focus on one role - articulator of the school's mission - that Sara Lightfoot writes about and Gail Dorph emphasized at that same CAJE consultation.

Lightfoot made me aware that in some schools the leadership is rather continually articulating the mission of the school in ways that provide direction to all involved. I had never fully realized how helpful that can be and how disorienting it can be when no one is really quite sure what the mission of the school(or synagogue) is about and hence what the staff and students are supposed to be accomplishing.

Schoem's study is a very painful case of where the articulated mission bears little relation to the reality of the school. "The Jewish way of life" functioned at that school as an empty slogan reminiscient of the domino theory during the war in Vietnam. No wonder both staff and students in the school wandered about in a half-dazed state. They literally did not know why they were there and what they were meant to accomplish while there.

Early on I realized that the synagogue schools I was studying stood in stark contrast to Schoem's case. In it interviewing the two respective principals, & was clear each had a vision of what Jewish education meant in that synagogue and school. It was a vision deeply shared with the senior rabbi. As I began observing I could tell the vision informed daily practice. Teachers would come to the principal with a problem and receive

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answers that felt coherent. "Oh, yea, now I remember how we handle this here and why we do it this way." Students and parents would receive similarly coherent messages and, quite crucially, so would the board and school committee so they too could remind themselves "why we do it this way." (That comes in very handy at budget hearings when there is a proposal to make cuts and everyone needs to be reminded of basic directions and rationale.)

Teachers in these schools are almost all part-timers who are not insiders to the congregation. They come from a myriad of backgrounds and with quite diverse ideas as to what Judaism and Jewish education are about. Whatever their pedagogic skill level, they need to look to one central address for direction, for answers to the basic questions, "how do we do things here" and "why." The principal has to answer the first; the clergy can help with the second.

The principal's answer is never purely theoretical or ideological. Sure, it is very helpful in Rosenak's terms for there to be an articulated theology of religious education. But as Gail Dorph pointed out, the answer is most helpfully put in curricular and pedagogical terms. "This is how we teach humash or pesach." "This is how we respond to this parental request or that student behavior." And the optimal learning time for teachers is not at the initial orientation meeting, but after the rough class or difficult conversation when the teacher feels bewildered and in need of immediate direction. The calm voice of experience and

direction is then truly valued.

But what struck me in the two schools is how often the basic mission was reiterated in different public forms. A few concrete examples will illustrate the point. At the temple where mastery of synagogue or siddur Hebrew was stressed, a group of parents studied on Sunday mornings how to read tefillot in Hebrew. When they achieved enough proficiency to read aloud in public, the principal organized a short service for that grade of children in which the several parents led the service in Hebrew. When the service was complete, the principle gave each parent a certificate and called up the parent's child to thank him or her for having helped the parent to reach this milestone achievement

At the temple where Melton Hebrew was taught, the 7th graders put on a short play in Hebrew for all lower grades on the last day of school. The play wasn't of high quality, but the kids loved it and all the clergy came to view it. The principal stood up after to tell the younger children that they too would reach the point of Hebrew proficiency where they could put on a play. Then he asked them to all thank the teachers who had worked so hard to offer them this gift of Hebrew.

If these celebratory moments stood in isolation they could be viewed as empty gestures. But I experienced them along with the members of the schools as epiphanal moments when what everyone understood to be the central values were being enacted. They were also communal moments when students, teachers, parents, principal and clergy were drawn into closer embrace around the

articulated mission of the school.

The Relationship of the Teachers to the Students

Lightfoot, in her descriptions of the good high schools, is very helpful in pointing out what psychologists call the parallelism in relationships. I have adapted insight that for this context. How the rabbi and lay leadership treat the principal has its parallel in how the principal treats the teachers, and how the principal treats the teachers has its parallel in how the teachers treat the students.

While there are always exceptions to be noted, I was struck ever and again in the schools I studied -in stark contrast to what Schoem reports - that the principals' feeling well supported and respected by the rabbi paralleled how they treated their teachers. In turn that style of relating tended to carry over into the classroom where the children were treated with alot of respect. I rarely witnessed either the shouting at or browbeating of students that in the past I so often witnessed in Hebrew schools. That was not tolerated as acceptible behavior. Sure, there were behavioral problems and teachers got angry and raised their voices. But that was not the norm, and the norm creates a very different atmosphere for learning. I never left these schools with a headache or that sinking feeling that I had just witnessed a child being humiliated by an adult or a teacher overwhelmed by a barnyard of out-of-control children.

I did see classes that did not work, teachers who lost

pedagogic control and students who misbehaved. But here is the crucial difference: in these schools the principal or lead teachers were on top of the situation and were almost immediately available to help out the weaker teacher whose class was faltering. Teachers were not abandoned to the terrors of an out-of control class and students were not left to act out their boredom. Help was only minutes away. It might mean the principal walked into the class to settle everyone down to be followed with sessions with the teacher on how to deal with the problems that had arisen. The working assumption was clear: we are in this together and the more effectively we can structure the children's learning experience, the more focused their behavior will become.

I also witnessed many more classes where the teacher was in pedagogical control, the students were involved in their learning and the principal or lead teacher entered to observe and comment, but not discipline. There were vast differences in how experienced and skillful different teachers were, but in speaking to the teachers, they often cited the factors of support, supervision and curriculum in explaining their own effectiveness.

1. Support - The teachers knew -because they were told in many different ways- that what they were doing was valued by the congregation. They felt appreciated, but also supported by parents who cared, the principal who helped out in many ways and fellow-teachers who shared advice and resources. Ceremonies honoring teachers were an extra- nice form of support and appreciation.

- 2. <u>Supervision</u> No teacher went unsupervised. In both schools the principal or lead teachers would move from class to class observing and then commenting. In addition, both schools offered after-school group and individual supervision sessions in which much training and resource-development occured. There were also teacher meetings devoted to reviewing curricular and behavioral issues.
- 3. Curriculum Teachers appreciated help in making curricular decisions and implementing them. In the case of a well-organized curriculum, like Melton Hebrew, the teachers spoke favorably of the training they received and the organization that the curriculum offered. Yet they often innovated within that structure. In cases where they were teaching subjects that were not so curricularized, they appreciated the principal's offering of a good textbook or other teaching devices. They also looked to one another to help with the devising of lesson plans and more creative teaching methods. In one school a fair amount of team teaching developed among teachers within the same grade level.

The results for student learning were fairly predictable. The best learning I saw took place in those classes where there were experienced and well-trained teachers working in innovative ways with a structured curriculum. One rabbi captured the children's attitude best when he said in their names: " I don't mind coming to Hebrew school; what I can't stand is when you waste my time." Some parents reported to me that their children were happiest when they felt they were really learning something

concrete in school. Hence they liked Hebrew best because they could see tangible progress in their own learning.

But those observations miss one a crucial point that I picked up in my study. The children cannot sustain on either Sunday mornings or weekday afternoons whole periods of time in which they singularly focus on Hebrew or Bible. What the more successful teachers do is quite predictably alternate the more cognitively-demanding time with lighter, more experiential exercises. The teachers come armed with learning games that they pull out when they feel the students attention has wandered. Or they devise skits or story-telling opportunities. Both schools used music and art very successfully as down-times between more pressured times. What the alteration allowed is for the learning to continue in more fun ways so that the children did not experience much of the twin evils - boredom cr wasted time.

The Relationship between the School and the Parents

So much has already been written about the alienation of the home from the school and the need for programs to draw parents into the school's orbit that I will repeat none of it here. My research confirmed my initial belief that while family education programs will not turn assimilated parents into beale teshuva, they will, when successfully run, attract a fair percentage of the parents to come on a regular basis - perhaps every two or four weeks - to learn more about themselves as Jews and what their children are learning in school.

What I had not before realized is the potential feedback loop between family education and congregational support for the school. Many parents join the synagogue when they enroll their child in the school. Their main contact with the synagogue is through the school. They may come for High holidays, but otherwise are non-participating members.

When the school attracts the parents into the building for family education, there is a real potential to develop relationships with the synagogue. If the rabbis are involved, they meet and get to know one another. If the synagogue sponsors havurot, the parents are candidates to join. Some become interested in involvement with the school committee or PTA. If the synagogue has Shabbat services for families, they tend to come.

In short their involvement in the synagogue begins to grow. As more active members, they begin to have more say in the congregational politic and give voice to parental perspectives. The synagogue leadership may be grateful to the school for this increased participation of these members. But perhaps even more important, the adult study of Torah grows appreciably within the congregation. Perhaps the greatest contribution of family education, when done seriously, is that it may mark a change in the congregational culture in which people come to realize that one powerful way to draw people into the synagogue is to offer them educational programs that speak directly to their current needs as parents. Who knows - they may even start to study one of Barry Holtz' recent volumes?

end had been made the common and size-

In summary I am suggesting that these four "relationships" when taken together offer us a potential guide to assessing the goodness of a synagogue school. I think the good school may have to have all four in place to be deserving of that designation.

I hope these reflections prove helpful.

With best wishes,

Joe Reimer



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

To: Sermon tox and Hunette Hochstein
To: Seymon Fox and Hunette Hichstein At FAX Number: Monkel Institute
From: BARRY HULTZ-
Date: 100 a 7
Total pages including this one:
RE: Best Practices Project

*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.



November 27, 1991

Seymour Fox Annette Hochstein Mandel Institute

Dear Seymour and Annette,

Shulamith suggested that I let you know some times for a telecon next week. I am available at around noon (NY time) on Monday December 2; and any time until 12:30 on Tuesday morning. I know that Shulamith has a telecon scheduled with you for Tuesday morning already; perhaps I should be added to the end of that. Let me know.

Here is what is happening with the Best Practices Project. I discussed some of this briefly in my conversation with Seymour before the GA. I am excerpting from an update I sent to Steve Hoffman yesterday:

- 1) For our first best practice analysis, we have decided to focus on the supplementary school. The reasons are probably obvious and I won't rehearse them here. Most of the people (e.g. Sara Lee, Jon Woocher, etc.) I spoke with about this matter also felt that it was the right place to start.
- 2) In that regard: On December 10th and 11th, I will be hosting a meeting at JTS with a small group who will join with Shulamith and me to discuss the issue of best practice in the supplementary school area. Our first task will be to decide what are the areas of specific best practice related to the supplementary school which will need to be considered when we choose exempla for our inventory. The second order of business will be actually getting some real suggestions of places for inclusion in the inventory.

So far the following people have agreed to attend: Carol Ingall and Joe Reimer (both of whom you know), Vicky Kelman (from Berkeley, a long-time Melton staff person), Sherry Blumberg (Assistant Professor of Jewish education, HUC-New York). Three others have been invited (Gail Dorph, Sam Heilman, Isa Aron).

3) After the meeting I will draft a memo that delineates what areas of best practice we want to look at for the area of the supplementary school. Using the memo, the group above will suggest candidates for inclusion in the inventory. That memo will also be sent to the senior policy advisers plus other helpful, "well-connected" Jewish education people.

WiGAZ ???

F. 3/ 18

5) I will also engage two graduate students of mine, as per Jon Woocher's suggestion, to examine past issue of JESNA's "roundup" issues of the <u>Pedagogic Reporter</u> for examples of best practice in the supplementary school that fit our criteria.

tact.

- 6) I will meet with Judith Ginzberg of the Covenant Foundation to see if they have examples from their applicants that would fit our criteria.
- 7) Meanwhile I (with some graduate students here) have also been trying to research (for later reference in our work with the Lead Communities) the literature on introducing change into educational settings.

Seymour and Annette, as to the the last point, I wonder if this issue can go onto the agenda for the meetings in January in Boston.

In the pages that follow. I am enclosing a copy of the letter I sent to the participants in the December 11th meeting.

Best wishes,

Barry Holtz

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Celan

LETTER OF INVITATION FOR DECEMBER MEETING

November 18, 1991

Dr.

Dear

I want to confirm our phone conversation inviting you to a meeting about the Best Practices Project of the Council for Initiatives in Jewish Education (CIJE). The meeting will take place on the evening of Tuesday, December 10th here at the Melton office beginning with dinner at 6 PM, running until around 9:30 or 10:00 and reconvening the next morning until midday. We'd like you for as much of that time as you can give us.

The purpose of the meeting is to solicit your advice and counsel concerning the Best Practices Project which I have been asked to organize. Let me give you some background on the project and then describe what our agenda will be. Here is an excerpt from a document that I was asked to write for the CIJE. You may find it of assistance in understanding what we are up to here.

The Best Practices Project

I. 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 would be to aid the future work of the Council, particularly as it helps to develop a group of model Lead Communities, "local laboratories for Jewish education." As the Lead Communities begin to devise their plans of action, the Best Practices inventory would offer a guide to successful programs/sites/curricula which could be adopted for use in particular Communities. The Best Practices inventory would become a data base of Jewish educational excellence to which the Council staff could refer as it worked with the various Lead Communities.

Thus the planners from a Lead Community could ask the Council "where in North America is the in-service education of teachers done well?" and the Council staff would be able to find such a program or school or site some place in the country through consulting the Best Practice inventory.

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 educational 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.

A project to create such an inventory begins with the assumption that we know how to locate such Best Practice. The "we" here is the network of people we know, trust or know about in the field of Jewish education around the country. Through using that network, as described below, we can begin to create the Best Practice inventory.

Theoretically, 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.

I say "theoretically" in the paragraph above because we will have to carefully examine the way that the inventory of good educational practice can best be used in living educational situations. Certainly significant stumbling blocks will have to be overcome. In what way, for example, will viewing the Best Practice of "X" in Boston, Atlanta or Montreal offer confidence building and programmatic assistance to the person sitting in the Lead Community? Perhaps he or she will say: "That may be fine for Boston or Atlanta or Montreal, but in our community we don't have 'A' and therefore can't do 'B'."

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 implementing it in their localities, no matter how good their intentions. The issue of translation from the Best Practice site to the Lead Community site is one which will require considerable thought down the road as this project develops.

The Best Practices initiative for Jewish education is a project with at least three interrelated dimensions. First, we will need

to create a list of experts in various aspects of Jewish educational practice to whom the CIJE could turn as it worked with Lead Communities. These are the consultants that could be brought into a Lead Community to offer guidance about specific new ideas and programs. For shorthand purposes we can call this "the Rolodex." The Rolodex also includes experts in general and Jewish education who could address questions of a broader or more theoretical sort for the benefit of the CIJE staff and fellows—people who would not necessarily be brought into the Lead Community itself, but would help the CIJE think about the work that it is doing in the communities.

The first phase of the Best Practices project -- stocking the Rolodex -- has already begun as the CIJE staff has begun working. It will continue throughout the project as new people become known during the process.

Second, the project will have as its primary mission the use of Best Practices for assisting the Lead Communities. For shorthand purposes we can call this "the data base." This will be described in detail in the next section of this memo below. the project has implications for a much larger ongoing research project. For shorthand purposes we can call this "the long-range The long-range plan is a major study of Best Practices plan." in Jewish education -- locating, studying and documenting in detail the best work, the "success stories," of contemporary Jewish education. (I say "contemporary" here, but a research project of this sort might well include a historical dimension too. What can we learn about the almost legendary supplementary school run by Shrage Arian in Albany in the 1960s should have important implications for educational practice today.) This work might be done, for example through a Center for the Study of Excellence in Jewish Education established at a institution of higher learning with a strong interest in Jewish education, in a School of Education at a university or created as a "freestanding" research center. Obviously, this project intersects with the research plan that the CIJE is also developing.

For the time being, however, our concern will be with "Best Practices for assisting the Lead Communities." Of course this focus and "the long-range plan" are not mutually exclusive. The latter flows from the former. As we begin to develop a data base for the Lead Communities, we will also begin to study Best Practices in detail. The difference between the two projects is that the Lead Communities will need immediate assistance. They cannot wait for the results of long-term research before acting. But what we learn from the actual experience of the Lead Communities (such as through the assessment project which will be implemented for the Lead Communities) will then become part of the rich documentation central to the long-range plan.

II. Best Practice and the Lead Communities

Of course there is no such thing as "Best Practice" in the abstract, there is only Best Practice of "X" particularity: the (good enough) Hebrew School, JCC, curriculum for teaching Israel, etc. The first problem we have to face is defining the areas which the inventory would want to have as its particular categories. Thus we could cut into the problem in a number of different ways. We could, for example, look at some of the "sites" in which Jewish education takes place such as:

- --Hebrew schools
- --Day Schools
- --Trips to Israel
- --Early childhood programs
- ~~JCCs
- --Adult Education programs

Or we could look at some of the subject areas which are taught in such sights:

- -- Bible
- -- Hebrew
- -- Israel

Other modes are also possible. Hence the following question needs to be decided: What are the appropriate categories for the inventory?

We propose to choose the categories based on a combination of the following criteria:

a) what we <u>predict</u> the Lead Communities will want and need, based on a survey of knowledgeable people (see step 1 below) and b) what we can get up and running quickly because we know the people and perhaps even some actual sites or programs already, or can get that information quickly.

III. Suggestions for a process

What has to be done to launch and implement the Best Practice project for Lead Communities? I would suggest the following steps:

1. Define the categories

To do this we should quickly poll a select number of advisers who have been involved in thinking about the work of the CIJE or the Commission to see what categories we can agree would be most useful for the Lead Communities. In addition we have looked at the local Commission reports to see what those communities suggested were their needs— on the assumption that the Lead Communities would in all likelihood resemble the local communities who have had commissions on Jewish education.

After some investigation and a number of conversations, it has become clear that one of the key categories— and the one that we will begin with— is the supplementary school. We have chosen to start with this area for two reasons: first, there is no doubt that Lead Communities will want to work to improve their supplementary schools. Simply too many students are serviced by these institutions to ignore them. Second, my own expertise and contacts are in this area and to get the project up and running here would be easier for me than to begin with, say, the JCC preschool area.

2. Gather a group of experts.

Here is where you, ???, come in. We are going to gather a group of five people who will look at our category and ask the question what do we mean by Best Practice in the realm of X (e.g. supplementary school)? In answering this question matters— to use the language of A Time to Act and the Commission— of both a programmatic and enabling type would surely emerge. In other words, we would hear about good programs (e.g. "how to teach Hebrew in the supplementary school") and we would hear about successful attempts at "building the profession" (e.g. "how one school implements a good staff training program").

Once we generated this list of ideas or components, we would then ask: 1) What examples in real life do we know of the Best Practice of these components? 2) And knowing these examples, now what would all this mean for the Lead Communities? How useful is it? After that discussion, the group of five would go home and do some "scouting". They would look into programs that they personally know about; they would call people they know for some advice and suggestions. Let's assume that this would take two days of work. After scouting around, they would be in touch with us (Shulamith and Barry) with their report.

3. Widen the net of contacts

At the same time we would use the list of ideas developed by the group of five to try to cast a wider net for specific examples of Best Practice. The CIJE would make direct contact through letter and phone to a group of 30-40 well-connected, well-traveled people in the field and solicit their advice for "candidates" of Best Practice, based on the topics that the group of five has suggested. In addition, a few graduate students could be engaged to look at back issues of <u>Pedagogic Reporter</u> and other published sources for possible candidates. I would talk with the Convenant Foundation people for their suggestions based on their work, etc.

4. Next Steps

When all this is completed, we may want to have another meeting of the group of five or we may find it necessary to initiate a

certain number of "site visits" to look at some of the examples of Best Practice that have been suggested. In most cases such visits will probably not be needed since the group of five will have recent and direct contact with the Best Practice sites that they are recommending. However, it is also likely that in researching for other examples, individuals will hear of sites that ought to be looked at. We anticipate up to five such site visits.

5. Evaluating what we have done

Once the sites visits are completed, we would then be in the position to "give ourselves a grade." We would ask: "Do we need more in order to help a Lead Community?" We would also ask a few outside critics for their grade. It's possible at this point that we would say that this process is a "good enough" cut at dealing with our issue. If so, we've learned a lot about how to get into this quickly and usefully. A more refined version could then be invented for later iterations. If we have serious questions about what we've done, we should then be able to rethink the process to figure out how to fix it. Most importantly it would give us a model for determining Best Practice in areas that we have less knowledge of familiarity with—the other categories of #1 above.

If this method is good enough to be of use to the Lead Communities, it might mean that we could go immediately into the research component. Here we would be doing serious examination of the Best Practices that we've listed, trying to analyze and describe in a reflective way the nature of the work going on in these places. It may be, in other words, that for immediate aid to the Lead Communities, the serious research is not necessary—it can kick in later down the road, as we move the work into a higher stage of analysis. What we do have to think about is how much do we need to know in order to be able to help a Lead Community.

6. The Next Phase

Here there are three options depending on how we answer the question immediately above. To help the Lead Communities: A) We have enough just simply by having a Rolodex card with the name of the site and relevant on-site people, the nature of the work done there and the seal of approval from our group of 5. B) We would need 1 to 3 page write-ups of the programs we've seen. C) We would need serious portraits/profiles of the schools in the manner of Sara Lawrence Lightfoot's The Good High School.

As you can see, I would like you to be one of our "group of five" described above and the purpose of our meeting in December is to deal with Step #2 above and aim toward future work. I think that this is an exciting project which has important implications for

Jewish education. I'm hoping that with your help we may be able to bring some real changes into the field. Please join with me in this work.

The CIJE is able to offer you \$400 (plus expenses) for your time. Please keep all your travel receipts so that you can be reimbursed. Thanks so much for your help. I'll see you soon.

Best wishes,

Barry Holtz

6



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

To: Sermon Fox and Annette Hochstein
At FAX Number: Mannel Institute
From: BARRY HOLTZ
Date: Oct 201 1991
Total pages including this one:
Here is the final Best Practices Plan.
Bully

^{*}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.



October 18, 1991

To: Steve, Shulamith, Seymour, Annette:

From: Barry Holtz

Re: The Best Practices Plan (Revised)

Dear Friends,

This memo will propose the "final" plan for the Best Practices Project, based on my meeting on September 5, 1991 with Seymour and Shulamith and on subsequent discussions with both of them.

The plan as it currently stands is an attempt to find an efficient and realistic way to implement the Best Practices Project. It tries to work, "quick and dirty," evaluating itself as it goes along and using what is well-known to us as a way to learn about how to understand the unknown. We would work like this:

YEAR ONE

A. We would decide on the four main areas or categories (such as "the supplementary school" or "early childhood programs") that the Best Practices Project should focus on. The suggestions would come from polling senior policy advisers and other "friends" of the CIJE and they would come by looking at the local Commission reports to see what those communities suggested were their needs—on the assumption that the Lead Communities would in all likelihood resemble the local communities who have had commissions on Jewish edutation.

B. We would them work in the following manner

Round One

We would try out the following exercise: Assume that we had only one month to help a Lead Community. We would take one of the four categories of "A" above and play it out. We would take the category that we felt that we already had some good contacts and ideas about. Most likely candidate: the supplementary school. We would gather (ideally for 2 days) five good people with knowledge of that area. These five are people we know or know of through our current contacts and we wouldn't worry at this point about all the good people whom we haven't included. Eventually we will gather others.

Phase One

The group of five would look at our category and ask the question what do we mean by Best Practice in the realm of X (e.g. sub-

The Jawish Theological Saminary of America + 3060 Broadway + New York, New York (10027 + Talephone), 2121 678-8035

plementary school)? In answering this question matters— to use the language of <u>A Time to Act</u> and the Commission— of both a program—matic and enabling type would surely emerge. In other words, we would hear about good programs (e.g. "how to teach Hebrew in the supplementary school") and we would hear about successful attempts at "building the profession" (e.g. "how one school implements a good staff training program").

Once we generated this list of ideas or components, we would then ask: 1) What examples in real life do we know of the Best Practice of these components? 2) And knowing these examples, now what would all this mean for the Lead Communities? How useful is it? After that discussion, the group of five would go home and do some "scouting". They would look into programs that they personally know about; they would call people they know for some advice and suggestions. Let's assume that this would take two days of work. After scouting around, they would be in touch with us (Shulamith and Barry) with their report.

Phase Two: Site visits

At this point it may be necessary to initiate a certain number of "site visits" to look at some of the examples of Best Practice that have been suggested. In most cases such visits will probably not be needed since the group of five will have recent and direct contact with the Best Practice sites that they are recommending. However, it is also likely that in researching for other examples, individuals will hear of sites that ought to be looked at. We anticipate up to five such site visits.

Next Steps: Evaluating what we have done

C. Once the sites visits are completed, we would then be in the position to "give ourselves a grade." We would ask: "Do we need more in order to help a lead Community?" We would also ask a few outside critics for their grade. It's possible at this point that we would say that this process is a "good enough" cut at dealing with our issue. If so, we've learned a lot about how to get into this quickly and usefully. A more refined version could then be invented for later iterations. If we have serious questions about what we've done, we should then be able to rethink the process to figure out how to fix it. Most importantly it would give us a model for determining Best Practice in areas that we have less knowledge of familiarity with— the other categories from "A" above.

If this method is good enough to be of use to the Lead Communities, it might mean that we could go immediately into the research component. Here we would be doing serious examination of the Best Practices that we've listed, trying to analyze and describe in a reflective way the nature of the work going on in these places. It may be, in other words, that for <u>immediate</u> aid to the Lead Communities, the serious research is not necessary— it can kick in later down the road, as we move the work into a higher stage of

-7

analysis. What we do have to think about is how much do we need to know in order to be able to help a Lead Community.

This would lead us to

Phase Three

Here there are three options depending on how we answer the question immediately above. To help the Lead Communities: A) We have enough just simply by having a Rolodex card with the name of the site and relevant on-site people, the nature of the work done there and the seal of approval from our group of 5. B) We would need 1 to 3 page write-ups of the programs We've seen. C) We would need serious portraits/profiles of the schools in the manner of Sara Lawrence Lightfoot's The Good High School.

Round Two

Round Two, also to be done in the first year, would deal with a second area/category from the A. list above. We would take the knowledge we had gained from Round One, adapt and change the method based on that experience, and deal with our new category. We should note, however, that it is likely that each subsequent "round" will take more time to implement, even though we will be refining the process as we go along. Why? Because we are going to begin with the area/category we know best, where we have good and reliable experts and contacts (e.g. to make up our group of 5). But in the later rounds we will be moving into areas that are less familiar to us and we will need more time to figure out who the right experts are and to gather the information.

YEAR TWO

Year Two would consist of developing additional "rounds" (to deal with other areas/categories--see A. above) and implementing what we have learned from Best Practices into the Lead Communities them-selves.

This latter process— what we have called "the issue of translation" in other memos— should involve a serious discussion and exploration by the staff of the CIJE before we undertake the work. It would be important to try to determine among other things: a) the particular nature of Best Practices that we have seen and the potential difficulties in moving any individual best practice from its "home" to the Lead Community; b) an evaluation of the economic implications of Best Practices— what does it cost to implement and run the programs we have seen and what might it cost to take a program from one place and introduce it into a Lead Community. Startup costs may have to be taken into consideration, for example, or hidden costs that may not be apparent until we try to move a practice into a Lead Community; c) Seymour has pointed out that we will need to invent a "curriculum" for translating any particular Best Practice into a Lead Community. In other words, one issue that we will have to deal

with is finding a way for the educators and involved laypeople in our Lead Community simply to understand the Best Practice we want to introduce. Then we must figure out the steps that can move the practice into the Community. In that regard we ought to look at: d; the literature from general education about the introduction of change into educational settings and particularly the question of what happens when change is mandated "from above." This might be very useful in our thinking about the Lead Communities.

Barry

cc. Isa Aron



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

To: Seymour Fox
At FAX Number: Mandel Institute
From: Barry Holtz
Date: October 2
Total pages including this one: 1
RE:
Dear Seymour,
Thanks for the message. Here is my situation as to your calling:
On Thursday (temorrow) I am available from around 12:30 to 4:30 (NY time). Sometime in there I will go to lunch, so if I know when you are going to call, it will be helpful.
On Friday, I am availble from around 10 AM to 2 FM. Once again, if you can tell me (via Fax) when you'll be calling, I will be sure to be in my office at that time.
Best,
Barry

VI. In conclusion...

Summarize your understanding of the member's views expressed during the interview.

Invite Board member to call you with furthor comments/questions etc. Indicate your availability and interest in points of view and the reaction of their associates/colleagues et. al, to the work of the CIJE and to issues in the field of Jewish education.

Please write up interview notes and forward them to Ginny by October 15th.

Thank you!

sre 10/2/91 The professional staff now includes a full-time Education Officer: the search committee is meeting candidates for the Executive Officer. Interviews are taking place with candidates planners. Educational consultants have been recruited for specific projects.

F. PLANS FOR THE CENERAL ASSEMBLY

In an effort to reach the lay leadership of the Jewish community as a 'public-service' for Jewish education the CIJE is planning a special session for Thursday afternoon, November 21st. Board members planning to attend the GA and those interested in the program are most cordially welcome to attend and participate.

Morton Mandel will introduce the session and report on CIJE work to date. The featured speaker will be Dr. Lee S. Shulman of Stanford University and president of the National Academy of Education.

Dr. Shulman will speak on educational change and the lead community as an attractive strategy for change in Jewish education. Barry Holtz will respond and comment on the specific approach to best practices and the lead communities.

FYI: The National Academy "is comprised of 75 scholars and distinguished professionals, all of whom were elected to the Academy in recognition of outstanding contributions to education. The mission of the Academy is "to promote scholarly inquiry and discussion concerning the ends and means of education, in all its forms, in the United States and abroad". The Academy conducts special studies and reviews in the public interest.

This session should be of interest to delegates concerned about Jewish education and issues in general education.

G. JANUARY BOARD MEETING/ANNUAL MEETING

The following information was contained in the cover letter that accompanied the minutes.

The January 16th meeting of the Board will take place in connection with the first annual meeting of the CIJE. The Board will meet in the morning followed by the annual meeting. A written annual report will be prepared in advance of the annual meeting and members of the Commission and others (education community, national lay leadership) will be invited to attend the annual meeting segment of the day.

Isa Aron will undertake this study. Her bio was in the Board materials: she wrote one of the commission papers and is one of the outstanding young scholars in the field of Jewish aducation. She is on the faculty of the Hebrew Union College- Los Angeles.

More detailed report on this project may be presented at the January Board meeting and information about its progress will be in the materials for the January meeting.

- o Elicit specific questions/comments/suggestions about research in Jewish education.
- o Arc there apecific areas Board members feel should be included?

Monitoring, ovaluation and food-back is an integral part of all CIJE activities and especially the lead communities project. Adam Gamoran will be developing this project. Adam is a sociologist of education and a member of the faculty of the University of Wisconsin at Madison. Reports on this project can be expected as the lead communities project progresses.

D. FOUNDATIONS

Announcements were made at the meeting by Mandel Associated Foundations (MAF) and the Wexner Foundations about their work in the area of personnel/training. We hope these will be an example others will follow.

Charles Brofman's CRB Foundation has expressed interest in work with the CIJE in the area of Israel experiences: Mrs. Melton noted at the meeting the various Melton funded projects in Jewish education. The CIJE anticipates other foundations will show interest in providing funding for specific projects.

"The field is under-funded". (Henry Zucker). We will not be able to rely on tuition and fees and federation support for the needs of the field. We will have to turn to others who share cur concerns and whose foundations are in a position to fund specific projects.

E. OVERVIEW OF CIJE

It has been less than a year since the CTJE was established and the publication of A Time To Act. Much has happened. A distinguished Board is still in formation and the Senior Policy Advisors representing the fields of education, training and community organizations has been assembled. Both groups have met twice this year.

Much work remains to be done to develop the content aspects. This is being undertaken by the education officer through consultations with individuals and organizations with expertise to lend to the project. Shulamith has begun work with the denominations and organizations: they can assist and benefit from work in the lead communities. She will develop a model using United Synagogue/JTSA. JCCA and JESNA and its departments are also involved in this activity to identify services and activities for possible inclusion into lead community project.

B. BEST PRACTICES

Barry Holtz's presentation to the Board was well-received. Inquire as to response of Board member to the presentation and the discussion. To update: a project budget is now being finalized. A team of educational experts is being identified and assembled to launch the project under the guidance of an advisory group. Note: All CIJE projects will have advisory groups. This is a way to 'check' our work on an ongoing basis- another form of quality control!

CIJE is now working on securing initial funding for this project. It will initially serve the lead communities but also has the potential for energizing the education communities and stimulating a wider variety of activities—e.g., educational conferences on "what works in education", workshops on the teaching of "x", longer term: centers for development of innovative approaches in education etc.

C. RESEARCH AND EVALUATION

Annette reported only in brief at the Board meeting. It is important that research and evaluation should not be viewed as a minor activity. RESEARCH AND EVALUATION ACTIVITIES ARE A CRITICAL ASPECT OF ALL PROJECTS AND A VERY HIGH PRIORITY.

A major accomplishment has been the identification of two outstanding researchers to work on this project.

A new project will begin this month— a planning study on Establishing a Research Agenda for Jewish Education. The project is designed to answer the following comprehensive question:

What steps- both short and long term- can the CIJE recommend in order to encourage and support the development of a strong and credible research capability in the field of Tewish education?.

IV. Opening the conversation:

For Board members who were commissioners: you may want to indicate that one of the productive aspects of the staff work of commission was the opportunity to speak/meet regularly about the work of the commission and to benefit from their specific points of view.

For Board members who were not commissioners: The CIJE wants to have the benefit of ongoing contact with members of the Board. All Board members are being called so that we can hear your views and incorporate suggestions and comments in our work.

NOTE: If you think there are commission materials/papers that members should have please let Ginny know and she will send these out. We can assume that all who were commissioners would have full sets of papers.

V. Topics

A. LEAD COMMUNITIES

At the Board meeting it was reported that the CIDE was prepared to launch the lead community project following the endorsement of the board.

"In reviewing the board discussion about lead communities, it was concluded that there is still a lot of misunderstanding on the part of directors. Based on the questions asked during the discussion, we realized that we need to do a better job of clarifying the lead community concept. Lead communities are intended to be laboratories with ideal conditions, therefore, it's impractical to consider as lead communities those places that don't have the optimum conditions. The board didn't seem to grasp this idea."

We want to follow up with people as soon as possible to clarify their understanding.

It is important to convey in the conversation that we listen carefully to comments of Board members. There is a feeling that the Board is not ready to completely endorse the project and that there is a need for further planning. We are proceeding but adding an additional planning step. This may require a slight modification of the timetable as we carefully detail all aspects of the project.

CENTER for Jewish Education

The Jewish Theological Seminary 3080 Broadway (212) 670-0001 FAX (212) 749-9085

RE:

To: Sermon Fox / Annette Hochstein
At FAX Number: mondel Institute
From: BARRY HOLTZ
Date: July 3/
Tutal pages including this and



CHOOSE IN THE SERVICE CHEEK WITH THE

July 31, 1991

To: Shulamith Elster, Steve Hoffman,

Seymour Fox, Annette Hochstein

From: Barry Holtz

Friends,

Here is the new version of the Best Practices Project paper, revised for use with the Senior Policy Advisers and the Board. Please let me know if you want other changes.

After speaking with Shulamith and Seymour, I have answered my question from the previous version: Best Practices will focus on the enabling option of personnel, not on particular programmatic options per se. Programmatic options will have a role here, but personnel ("building the profession") will be the microscope under which certain programmatic options will be viewed.

BUT: after thinking about this, something here makes me nervous and I would very much like to hear your collective response: I began to think about how going this route is bound to run into heavier political troubles than what we'd get doing a straight collection or analysis of various examples of best practice among the programmatic options. Why? Because doing some of the programmatic options would tend to be a much more local thing, while the personnel issue is going to put us in the situation of evaluating national institutions. That is, is I am looking at examples of best practice within JCCs or looking for good supplementary schools or places where Hebrew is taught well (i.e. the programmatic options approach), I am going to find one in Denver, another in San Diego, another two in Boston, etc. But if I am looking at who does training of personnel for supplementary schools (i.e. going the enabling option route of personnel) -- aren't I stuck having to deal with a small number of national institutions (JTS, HUC, Brandeis) and in the politically touchy waters of evaluating them?

I think this could present major problems for the project and I'd like some response from you four in this matter. Is there any way to avoid this? Am I missing something here?

While I have your attention, let me now raise a second problem (which was in the other draft of the paper as well). I just got off the phone with Isa and she asks the following: by not doing the programmatic options are we going to shortchange the

Holtz--2

Lead Communities who are looking for some very practical short-range advice about issues such as teaching Hebrew in the day school, running good (best practice) trips to Israel, hearing about curricula for early childhood education? Isn't the personnel issue too broad and too "non-programmatic" for good, quick help to the Lead Communities? Any responses?

News flash: I finished this letter and then got a call from Adam who had a very similar reaction to Isa's. He thinks that an "inventory" makes sense when it is a collection of programs, but the personnel issue doesn't seem to have that "practice" dimension which will be of immediate use to the Lead Communities. So what do you all think?

Best.

July 30, 1991

The Best Practices Project Barry W. Holtz

I. 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 would be to aid the future work of the Council, particularly as it helps to develop a group of model Lead Communities, "local laboratories for Jewish education." As the Lead Communities begin to devise their plans of action, the Best Practices inventory would offer a guide to successful programs/sites/curricula which could be adopted for use in particular Communities. The Best Practices inventory would become a data base of Jewish educational excellence to which the Council staff could refer as it worked with the various Lead Communities.

Thus the planners from a Lead Community could ask the Council "where in North America is the in-service education of teachers done well?" and the Council staff would be able to find such a program or school or site some place in the country through consulting the Best Practice inventory. It is likely that the inventory would not be a published document but a resource that the Council would keep or make available to particular interested parties.

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 educational 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.

A project to create such an inventory begins with the assumption that we know how to locate such Best Practice. The "we" here is the network of people we know, trust or know about in the field of Jewish education around the country. I assume that we could generate a list of such people with not too much difficulty. Through using that network, as described below, we can begin to create the Best Practice inventory.

Theoretically, in having such an index the Council would be able to offer both encouragement and programmatic assistance to the particular Lead Community asking for

Practices ideas into new settings.

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.

I say "theoretically" in the paragraph above because we will have to carefully examine the way that the inventory of good educational practice can best be used in living educational situations. Certainly significant stumbling blocks will have to be overcome. In what way, for example, will viewing the Best Practice of "X" in Boston, Atlanta or Montreal offer confidence building and programmatic assistance to the person sitting in the Lead Community? Perhaps he or she will say: "That may be fine for Boston or Atlanta or Montreal, but in our community we don't have 'A' and therefore can't do 'B'."

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 implementing it in their localities, no matter how good their intentions. The issue of translation from the Best Practice site to the Lead Community site is one which will require considerable thought as this project develops. What makes one curriculum 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 or Minneapolis. Part of this project will involve figuring out the many different components of any successful practice.

As we seek to translate and implement the best practice into the Lead Communities, it will be important also to choose those practitioners who are able to communicate a deeper understanding of their own work and can assist the Lead Communities in adapting the Best

The Best Practices initiative for Jewish education is a project with at least three interrelated dimensions. First, we will need to create a list of experts in various aspects of Jewish educational practice to whom the CIJE could turn as it worked with Lead Communities. These are the consultants that could be brought into a Lead Community to offer guidance about specific new ideas and programs. For shorthand purposes we can call this "the Rolodex." The Rolodex also includes experts in general and Jewish education who could address questions of a broader or more theoretical sort for the benefit of the CIJE staff and fellows—people who would not necessarily be brought into the Lead Community itself, but would help the CIJE think about the work that it is doing in the communities.

The first phase of the Best Practices project-- stocking the Rolodex-- has already begun as the CIJE staff has begun working. It will continue throughout the project as new people become known during the process.

Second, the project will have as its primary mission the use of Best Practices for assisting the Lead Communities. For shorthand purposes we can call this "the data base." This will be described in detail in the next section of this memo below. Third, the project has implications for a much larger ongoing research project. For shorthand purposes we can call this "the long-range plan." The long-range plan is a major study of Best Practices in Jewish education-- locating, studying and documenting in detail the best work, the "success stories," of contemporary Jewish education. (I say "contemporary" here, but a research project of this sort might well include a historical dimension too. What can we learn about the almost legendary supplementary school run by Shrage Arian in Albany in the 1960s should have important implications for educational practice today.) Such a project should probably be located in an academic setting outside the CIJE. We could imagine a Center for the Study of Excellence in Jewish Education established at a institution of higher learning with a strong interest in Jewish education, in a School of Education at a university or created as a "free-standing" research center. Obviously, this project intersects with the research plan that the CIJE is also developing.

"Best Practices for assisting the Lead Communities" and "the long-range plan" are not mutually exclusive. The latter flows from the former. As we begin to develop a data base for the Lead Communities, we will also begin to study Best Practices in detail. The difference between the two projects is that the Lead Communities will need immediate assistance. They cannot wait for before acting. But what we learn from the actual experience of the Lead Communities (such as through the assessment project which will be implemented for the Lead Communities) will then become part of the rich documentation central to the long-range plan.

II. Best Practice and the Lead Communities

Of course there is no such thing as "Best Practice" in the abstract, there is only Best Practice of "X" particularity: the (good enough) Hebrew School, JCC, curriculum for teaching Israel, etc. The first problem we have to face is defining the <u>areas</u> which the inventory would want to have as its particular categories. Thus we could cut into the problem in a number of different ways. We could, for example, look at some of the "sites" in which Jewish education takes place such as:

--Hebrew schools

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- -- Day Schools
- -Trips to Israel
- -- Early childhood programs
- --JCCs
- --Adult Education programs

Or we could look at some of the subject areas which are taught in such sights:

- -- Bible
- -- Hebrew
- -- Israel

Other modes are also possible. Hence the following question needs to be decided: What are the appropriate categories for the inventory?

We propose to choose the categories based on a combination of the following criteria: a) what we <u>predict</u> the Lead Communities will want and need, based on a survey of knowledgeable people (see step 1 below) and b) what we can get up and running quickly because we know the people and perhaps even some actual sites or programs already, or can get that information quickly.

III. Suggestions for a process

What has to be done to launch and implement the Best Practice project for Lead Communities? I would suggest the following steps:

1. Define the categories

To do this we should quickly poll a select number of advisers who have been involved in thinking about the work of the CIJE or the Commission to see what categories we can agree would be most useful for the Lead Communities.

Our main focus should be the Commission's "enabling option" of developing personnel for Jewish education ("building the profession"). (A second enabling option-- mobilizing community support for Jewish education-- will be dealt with as the Lead Communities are selected and as they develop. Although in principle the "Best Practices" approach might also apply in this area--e.g. we could try to indicate those places around the country in which community support has been successfully mobilized for Jewish education-- the Best Practices project will be limited to the enabling option of "building the profession." A different subgroup can be organized to investigate the Best Practices for community support option. The option of the Israel Experience, viewed as an enabling option, could also be studied by a different subgroup.)

The enabling option of "building the profession" comes to life only when we see it in relationship to the ongoing work of Jewish education in all its many aspects. A number of these dimensions of Jewish education were discussed during the meetings of the Commission and twenty-three such arenas for action were identified. These were called the "programmatic options" and the list included items such as early childhood education, the day school, family education, etc. Although the Commission decided to focus its work

on the <u>enabling</u> options (rather than any specific programmatic options) because of their broad applicability to all areas of Jewish education, it is appropriate for the Best Practices project to turn now to explore the specific programmatic options which can be of most benefit to the Lead Communities. Indeed, it is this list, coupled with the enabling option of building the profession, that can help us begin the process of deciding what specific areas of best practice we ought to analyze.

The method of work will be to use the enabling option of "building the profession" as a lens through each of the chosen programmatic options (from the original list of twenty-three) are viewed. Each chosen programmatic option would be viewed specifically in the light of best practice in building the profession within its domain. For example, what is the best practice of building the profession within the domain of the programmatic option called "adult education" or "early childhood education."

2. Commission a document (a "definitional guide") for each option.

The definitional guide is a document which is prepared for each category. Its purpose is to offer guidance as we seek to determine best (i.e. "good enough") practice within the category.

One advantage of focusing on the enabling option of personnel is that in the Commission report we already have a headstart in defining the how we should go about studying the programs we will examine. A Time To Act (pp. 55-63) analyzes "building the profession" in the light of six subcategories: 1) recruitment, 2) developing new sources of personnel, 3) training, 4) salaries and benefits, 5) career track development, 6) empowerment of educators.

These six subcategories can be the filter we use in looking at the programmatic options under consideration. Thus, if one chosen programmatic option is supplementary school education we could ask: where are the good programs for recruiting personnel to the supplementary school? who does a good job of developing new sources of personnel for the supplementary school? where is the training of personnel for the supplementary school done well? who has done an interesting job in improving salaries and benefits? Has any place implemented outstanding programs of career track development? Are there examples that can be found of the empowerment of educators? The same six points of building the profession can be applied to any of programmatic options.

The definitional guide will take these six subcategories and flesh them out and refine them as an aid which can be used by the "location finders" (see below) who will help us locate specific examples of current best practice in the field. The guide should also include a suggested list of "location finders" for each area. The CIJE staff would react to these papers but we anticipate that this should be a fairly fast process.

3. Identify the location finders

Once we define a list of categories and definitional guides for each, we would then want to find a group of "location finders" who would recognize or know about "Best Practice." It may also require a meeting of people to brainstorm places, sites, people as well. There probably also should be a group of well-traveled Jewish educators who could suggest the "location finders" to the CIJE.

4. Get the lists

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Once we have the "location finders" for each category and the definitional guides, we can then put together the suggested lists of best practice for each category. This could come via meetings (as mentioned above), through phone calls or simply through getting submissions of lists from the location finders for each category.

Yet another approach that also can be implemented is a "bottom up" attack on this issue. The CIJE can put out a call to the field for suggestions of best practice to be included in the inventory. One model we ought to investigate is the National Diffusion Network, an organization in general education which seeks to disseminate examples of best practice around the country through this bottom up approach. We would need to explore how the Network deals with questions of quality control to see if it is applicable to our needs.

5. Evaluate the choices

Once we receive the proposed lists in each category, we are going to need to implement some independent evaluation of the candidates for inclusion. As stated above quality control is an important element of the Best Practices project. It will be important, therefore, to have outside experts at our service who could go out into the field to look at those sites that have been proposed as examples of Best Practices. Before we can pass on these exemplars for use by the Lead Communities, we must be able to stand by what we call "best."

6. Write up the reasons

Here this project begins to overlap with other research concerns mentioned in the report of the Commission. The evaluation that has begun in the step above now must move on to another stage. We have to go beyond mere lists for the inventory so that we can try to determine what it is that defines the 'goodness" of the good that has been identified. Otherwise the general applicability of the inventory will never be realized. We will certainly get some of this from the location finders. They will need to tell us the reasons for their choices. The outside evaluators will also need to write up the projects that they visit. In this way we can begin to develop a rich source of information about the success stories of Jewish education and how they might (or might not) be translated into other situations.

7. Translate to Action for the particular Lead Communities

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What in each Best Practice case can be translated to the Lead Community and what cannot? This is a complicated question and requires the job described in #6 above, at least for those cases in which the Lead Community is planning to implement action.

It then requires a careful monitoring of what is going on when the attempt to translate particular Best Practices actually is launched. This monitoring is the intersection of the Best Practices project with the research and assessment that will be conducted in each Lead Community. How the two matters are divided-- Best Practices Research and Lead Communities Assessment-- is a matter that needs further clarification as the work proceeds.

But another issue that forms the background to all of this work is an important additional research project that probably should be undertaken by the Best Practices project (in consultation with the researchers working on the Lead Communities). That is an investigation of the current knowledge and state of the art opinion from general education on the question of implementing change and innovation into settings. A second and related issue is the question of research on implementing change into sites which are larger than school settings since this seems to be applicable to the ambitious goals of the Lead Communities project.

IV. Timetable

What of these seven steps can and should be done when? Probably the best way to attack this problem is through successive "iterations," beginning with a first cut at finding examples of best practice through using the network of Jewish educators whom we know, then putting out a call for submissions to the inventory, and getting preliminary reports from the "location finders." A second stage would evaluate these first choices and begin the writing up of reasons that can lead to action in the Lead Communities. During the process we would, no doubt, receive other suggestions for inclusion on the list and the final inventory of Best Practices would get more and more refined as the exploration continued. On successive investigations we can refine the information, gather new examples of practice and send out researchers to evaluate the correctness of the choices. The important point is that the Best Practices project can be launched without waiting for closure on all the issues. Thus we will be able to offer advice and guidance to the Lead Communities in a shorter amount of time.

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V. Lead Communities: Beyond Best Practices

In the view of A Time to Act the "Lead Communities would be encouraged to select elements from the inventory" (p. 69) of Best Practices as they developed their educational plan. It is with this goal in mind, that we wish to initiate the Best Practices project. But it is important to add a caveat as well: Innovation in Jewish education cannot be limited only to implementing those programs that currently work into a new setting called the Lead Community. If Jewish education is to grow it must also be free to imagine new possibilities, to reconceptualize as well as to replicate. One practical approach to this matter would be an investigation of innovative ideas that have been written about, but have never been tried out in Jewish education. A search of literature for such ideas should also be undertaken either under the rubric of the Best Practices Project or through any research project put into operation by the CIIE.

"Best Practices" should be only one dimension of Lead Communities. The crisis in Jewish education calls for new thinking: Bold, creative, even daring "new practices" must also play a role in our thinking as the Lead Communities search for ways to affect Jewish continuity through Jewish education. Under the banner of the Best Practices Project we should create the Department of Innovative Thinking for Jewish education. This would be the arena in which new ideas or adaptations of ideas from other contexts could be formulated and eventually funded for Jewish education. This could be done through conferences, commissioned think pieces or through the investigation mentioned above of ideas that have written about, but never tried out. The Best Practices project gives us a chance, in other words, to dream about possibilities as yet untried and to test out these dreams in the fiving laboratories established by the Lead Communities.

L&S COPY CENTERS

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FAX TRANSMISSION

To Annette Hochstein
Address Mandel Institute, Jerusalem, ISPAEL country/city/state
Fax No. O11-972-2-619951 country code/city code/area code/telephone #
From Adam Gamoran Address O of Wisconsin
Date Jan 16 1992 Total Number of pages (incl. cover sheet) 12
Message Attached is my paper on New Futures sits in plications for CIJE. I look formand to discussing it. I will brug samples of evaluation reports to the meeting; they are too bulky to fax.
I will send copies of materials to J.m Coleman and will make a hotel reservation at the Ramada (formerly Hyde Park Hilton) for Thursday night Jan 23. I assume that I will be returning home late triday.
Adam _

YEAR DIFFERENCE VEHICLES

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

Adam Gamoran University of Wisconsin-Madison

A paper prepared for circulation within the Council for Initiatives in Jewish Education (CIJE).

January, 1992

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

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

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

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

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

The Design of New Futures

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

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

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

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

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

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

New Futures' Limited Success

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

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

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

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

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

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

SEAR DESCOULT VENTER

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

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

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

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

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

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

Implications: How Can the CIJE Avoid Similar Frustration?

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

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

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

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

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

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

Balance enthusiasm with careful planning. Those involved in New Futures believe they should have spent more time building coalitions and establishing strategies before introducing new programs. Douglas W. Nelson, executive director of the Casey Foundation, regrets that more time was not taken for planning. He observed: "We made it more difficult, in the interest of using the urgency of the moment and the excitement of commitment, to include and get ownership at more levels" (Education Week, 9/25/91, p. 13). Again, it is not just the structure that requires change—this can be mandated from above—but the unspoken assumptions and beliefs that guide everyday behavior which require redefinition. Institutional culture cannot be changed by fiat, but only through a slow process of mutual consultation and increasing commitment.

Lead communities also need a long planning period to develop new educational programs that are rich in content and far-reaching in impact. This process requires a thorough self-study, frank appraisal of current problems, discussions of goals with diverse members of the community, and careful consideration of existing knowledge. If "lead communities" is a twenty-year project, surely it is worth taking a year or more for preparation. Deliberation at the planning stage creates a risk that momentum will be lost, and it may be important to take steps to keep enthusiasm high, but the lesson of New Futures show that enthusiasm must not overtake careful planning. The current schedule for the lead communities project (as of January, 1992) appears to have taken account of these concerns.

Awareness of unavoidable tensions. New Futures' experience highlights tensions that are inherent to the process of an outside intervention, and the CIJE must be sensitive so the effects of such tensions can be mitigated. The CIJE must recognize the need for stability after dramatic initial changes take place. The CIJE's evaluation plan must be developed and agreed upon by all parties before the end of the lead communities' planning period. Technical support from the CIJE must be sustained, rather than haphazard. While the CIJE cannot hold back constructive criticism, it must balance criticism with support for honest efforts. Many of these tactics have been used by New Futures, and they may well account for the fact that New Futures is still ongoing and has hopes of eventual success, despite the frustrations of the early years.

Conclusion

The New Futures Initiative, the Casey Foundation's effort to improve the lot of at-risk youth in four American cities, has been limited by supplemental rather than fundamental change, the inability to modify underlying beliefs even where structural changes occur, and by the complexities of coordinating the work of diverse agencies. Although it will be difficult for the CIJE to overcome these challenges, awareness of their likely emergence may help forestall them

or mitigate their consequences. In particular, the CIJE should help lead communities develop their visions of new educational programs; think about cultural as well as structural change; ensure a thorough self-study, wide-ranging participation, and careful planning; and remain sensitive to tensions that are unavoidable when an outside agent is the stimulus of change.

Lo alecha ha-m'lacha ligmor, v'lo ata ben horin l'hibatel mi-menah. Ha-yom kutzar v'ha-m'lacha m'rubah, v'ha-poalim atzcylim, v'ha-sahar harbeh. U-va'al ha-bayit dohek --- Pirke Avot.

(It is not your responsibility to finish the task, but neither are you free to shirk it. The day is short and the task is large, the workers are lazy, and the reward is great. And the Master of the House is pressing --- Sayings of the Fathers.)



NOTES AND REFERENCES

- 1. Lawrence, Massachusetts, was originally included as well, with an additional \$10 million, but it was dropped during the second year after the community failed to reach consensus on how to proceed.
- 2. This account relies largely on two sources. One is an Education Week news report by Deborah I. Cohen, which appeared on Sept. 25, 1991. The second is an academic paper by the Casey Foundation's evaluation team: Gary G. Wehlage, Gregory Smith, and Pauline Lipman, "Restructuring Urban Schools: The New Futures Experience" (Madison, WI: Center on Organization and Restructuring of Schools, May 1991).
- 3. The reforms required (or "strongly encouraged") by the Casey Foundation were site-based management, flexibility for teachers, Individualized treatment of students, staff development, and community-wide collaboration. This list is longer than the CIJE's, whose required elements are building the educational profession and mobilizing community support.
- 4. On the decline of spirituality in America, see Robert N. Bellah et. al, Habits of the Heart (Berkeley, CA: University of California Press, 1985).

Date: Sat, 9 Nov 1991 00:43 CDT

From: <GAMORAN@WISCSSC>

Subject: update

To: MANDEL@HUJIVMS
Original To: ANNETTE

I wanted to give you an update on a couple of items. First, I had several phone conversations with Daniel Pekarsky and Daniel Blain in Cleveland. Pekarsky is now proposing self-evaluations there, at least as the first step, rather than an outside evaluator.

This idea grew out of the great difficulty he found in reaching agreement among the various participants in Cleveland on what would be evaluated and how the evaluation would occur. An outside evaluator might be brought in at a later stage. I advised both Pekarsky and Blain on this plan. First, I thought it sounded like an intelligent plan given the frustration of current efforts—it seemed as if it would have taken a year or so just to agree on an evaluation plan, let alone do any evaluating, as things were progressing. Second, I suggested they present the plan as a "reflective practitioner" approach to evaluation, as a way of framing the plan and explaining how it would work and why it would be useful. Third, I raised two concerns about this approach:

- (1) For the self evaluation to be meaningful, the stakes cannot be overly high. Dan Pekarsky convinced me that those running programs are thoughtful, intellegent, and insightful, but no one would do an honestly critical self-evaluation if his/her job were on the line.
- Thus, the self-evaluations can be used only for improving programs that have been implemented, not for making decisions about the survival of programs, agencies, or positions.
- (2) The reason most educators cannot be reflective practitioners, I suggested, is that they are too busy running the programs to have time to reflect critically or evaluate. For the reflective practitioner approach to succeed, plans for making time available must be made explicit in job responsibilities, schedules, and budgets. Whoever is responsible for writing the self-evaluation
- (e.g., the program head) must have some of his/her time freed by passing off some of his/her other duties to other people, or a new person must be retained to compile the information necessary for the internal evaluation. Either way, it cannot be seen as costless.
- So I'm not going to Cleveland for the time being. But I have learned from this experience how essential it is for the CIJE's evaluation plan to be in place BEFORE the lead communities are selected. In that way, I am hoping the disagreements occurring in Cleveland can be avoided or set aside.

The second item is that I had a fruitful conversation with Jack Ukeles and Shulamith about the intersection of the planning and execution of programs in the lead communities on the one hand, and the monitoring, evaluation, and feedback project on the other. Jack will be incorporating the results of our talk into his writing on the lead community process. Essentially, Jack felt a need for more information, and more frequent feedback, within the lead communities, than would be forthcoming in my plan. We discussed different means for providing information, either as part of or separate from the MEF project. One interesting possibility is that the local lead-community manager would prepare a quarterly report, with the informal brief written by the field researcher as part of his/her data. Jack is working on this idea or variations. His concerns clarified for me the likely tension in the field researcher's role, as an insider and an outsider. These roles may be differentiated temporally, with the field researcher's quarterly reports serving the insider role, and the annual reports more like outside (but still formative) evaluation.

We also discussed the need for standardized data across the field sites—whether it be test scores, participation rates, interview protocols, and so on. That is an important point, and I must not let it fall through the cracks. I think there are mechanisms for ensuring some standarized data collection, such as the initial training, regular contact, and frequent meetings among the field researchers. But this point needs more emphasis than I've given it so far.

Finally, Jack asked who the field researchers work for: the lead community or the CIJE? I indicated that the field researchers do not work for the lead community. Whether they work for the CIJE or the Mandel Institute I was not sure. What is the current thinking on this?

Hope all is well, Adam

Monitoring, Evaluation, and Feedback in Lead Communities:

A Three-Year Outline

Adam Gamoran University of Wisconsin, Madison

October, 1991

Monitoring, Evaluation, and Feedback in Lead Communities:

A Three-Year Outline

In late 1990, the Commission on Jewish Education in North America issued A Time to Act, a report calling for radical improvement in all aspects of Jewish education. At the center of the report's strategic plan was the establishment of "lead communities," demonstration sites that would show North American Jews what was possible:

Three to five model communities will be established to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, when the importance of Jewish education is recognized by the community and its leadership, and when the necessary funds are secured to meet additional costs (p. 67).

One year later the successor to the Commission, the Council for Initiatives in Jewish Education (CIJE), is mobilizing to establish lead communities and to carry out the strategic plan.

How will we know whether the lead communities have succeeded in creating better structures and processes for Jewish education? On what basis will the CIJE encourage other cities to emulate the programs developed in lead communities? Like any innovation, the lead communities project requires a monitoring, evaluation, and feedback component to document its efforts and gauge its success.

This proposal describes a plan for monitoring, evaluation, and feedback in lead communities. It emphasizes two aspects of educational change in lead communities:

- (1) What is the *process* of change in lead communities?
 - This question calls for field research in the lead communities. It requires a combination of qualitative and quantitative data, and offers formative as well as summative evaluation—that is, feedback as well as monitoring—for the lead communities.
- (2) What are the *outcomes* of change in lead communities?

This question is especially challenging because the desired outcomes have yet to be defined. Hence, addressing the question requires, first, enumeration of possible outcomes, second, development of indicators for measuring selected outcomes, and third, research on the connection between programs in lead communities and the measured outcomes.

Field Research in Lead Communities

Studying the process of change in lead communities should be a major component of the CIJE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation. Suppose despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

Field Researchers.

At least one half-time field researcher would be hired for each community. Although budgetary and personnel constraints are likely to limit the number of researchers the CIJE is able to hire, we should be aware that the depth of monitoring, evaluation, and feedback will be related to the number of researchers supported by the CIJE. I estimate that one half-time researcher would be able to provide the level of detail described in this memo if the size of the Jewish community is approximately 50,000 or smaller.

Field researchers would have the following responsibilities:

- Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities.
- 2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.

- 3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system, broadly conceived.
- 4. Prepare informal quarterly briefs which will serve as a source of feedback for participants in the lead communities.
- 5. Write a nine-month report (May 1993) describing and interpreting the process and products of change to date. An important contribution of the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the Commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CIJE.
- 6. Replicate the initial data collection a year later, and continue monitoring progress toward the commission plan.
- 7. Issue a 21-month report (May 1994), which would describe educational changes that occurred during the first two years, and present an assessment of the extent to which goals have been achieved. Two types of assessment would be included: (a) Qualitative assessment of program implementation. (b) Tabulation of changes in rates of participation in Jewish education, which may be associated with new programs.

It may be possible to compare changes in rates of participation to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of Hebrew school attendance after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The 21-month reports would serve as both formative and summative evaluation for the local commissions and the CIJE. In other words, they would not only encourage improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

8. Field researchers would also serve as advisers to reflective practitioners in their communities (see below).

Schedule.

During fall 1991, a job description and list of qualifications would be prepared. The researchers would be hired and undergo training during spring and summer 1992. During this period, further details of the monitoring and feedback system would be worked out. The fieldwork itself would begin in late summer or early fall 1992.

Chief field researcher.

One of the field researchers would serve as chief field researcher. The chief field researcher would work full-time. In addition to studying his or her community, the chief field researcher would be responsible for training the others and coordinating their studies. S/he would also participate in developing a more detailed monitoring and feedback system.

Director of monitoring, evaluation, and feedback.

The chief field researcher would be guided by a director of monitoring, evaluation, and feedback. The director would be responsible for providing leadership, establishing an overall vision for the project. Further responsibilities would include making final decisions in the selection of field researchers; participating in the training of field researchers and in the development of a detailed monitoring and feedback system; overseeing the formal and informal reports from field researchers; and guiding plans for administration of surveys and tests in the lead communities.

Reflective practitioners.

In each lead community, two or more reflective practitioners would be commissioned to reflect on and write about their own educational efforts. The reflective practitioners, who could be selected by their local councils, would be teachers or administrators involved in CIJE programs with reputations for excellent practice, or who are attempting to change their practices substantially. The local field researchers would supervise and advise the reflective practitioners.

Collection of achievement and attitudinal data.

Although specific goals for education in lead communities have yet to be defined, it is essential to make the best possible effort to collect rudimentary quantitative data to use as a baseline upon which to build. Details of this data

collection, and a plan for longitudinal follow-ups, cannot yet be specified. As an example, we might administer a Hebrew test to seventh graders in all educational institutions in the community. Seventh grade would be chosen because it is the grade that probably captures the widest participation of students who study Hebrew. The test would need to be highly inclusive, covering, for example, biblical, prayerbook, and conversational Hebrew. It may not be restricted to multiple-choice answers, in order to allow respondents to demonstrate capacity to use Hebrew as a language. The test would be accompanied by a limited survey questionnaire of perhaps twelve items, which would gauge students' attitudes and participation levels. This data collection effort would be led by a survey researcher, with assistance from the field researchers, from community members who would be hired to help administer the survey, and from specialists who would score the tests.

Development of Outcomes

It is widely recognized that the question of the outcomes of Jewish education, which was not addressed in the Commission report, cannot be avoided by the CIJE. This is not only a practical necessity, but a requirement of the research project: to evaluate the success of programs in the lead communities, one must know the criteria by which they are to be evaluated. Hence, the research project will take up the issues of (a) what are the aims of Jewish education; and (b) how can those aims, once defined, be measured?

Proposed tasks for this component of the project for the first two years are:

- 1. Commission a thought paper by an experienced professional on the outcomes of Jewish education. Guidelines for the paper would include:
 - (a) The focus would be concrete rather than vague. This might be accomplished by posing the question as, "If you were to evaluate the outcomes of Jewish education, what would you look at?"
 - (b) Outcomes should be addressed in the areas of cognition, attitudes, values/beliefs, practices, and participation.
- 2. Distribute the paper for comments to national/continental organizations for feedback.
- 3. Engage the original writer to expand the paper in light of feedback received from the major organizations. The revision should include an analysis of points of agreement and disagreement among the organizations.

- 4. Present the revised paper to the research advisory group, posing the following questions:
 - (a) What do you make of this set of outcomes?
 - (b) How might they be measured?

The research advisory group would have two additional sources of information to consider: the operative goals of programs in lead communities, as described by field researchers in their 9-month reports; and conceptions of the educated Jew developed by the Mandel Institute.

 Commission appropriate experts to begin selecting or creating outcome indicators.

Stimulation of Self-Contained Research Projects

At any time during the process, the CIJE may require urgent attention to specific issues of educational effectiveness. (An example might be the relative effectiveness of supplementary school and summer camp attendance for Jewish identification.) After developing an internal consensus, CIJE would either (1) issue a request for proposals on that topic, or (2) recruit and commission individual to carry out the research project.

TIMELINE

Fieldwork		Outcome Development
Fall 1991	create job description	commission paper
Spring 1992	oversee hiring, training	
August 1992	S/PV	approve first paper
Fall-Spring, 1992-93	fieldwork underway, quarterly briefs, administer surveys/tests	responses to paper from national organizations.
May 1993	9-month reports	revise paper
August 1993		meet with research advisory committee
Fall-Spring, 1993-94	fieldwork continues, quarterly briefs	develop outcome in- dicators
May 1994	21-month reports	

Subj: thanks

Received: by HUJIVMS via NJE (HUyMail-V6c); Sun, 28 Jul 91 08:24:11

Date: Sat, 27 Jul 91 22:11 CDT

From: GAMORAN@WISCSSC

Subject: thanks To: ANET@HUJIVMS

Original To: ANNETTE

To be filling

Thanks so much for the lovely calendar, which I received via Cleveland. This was just another example of what thoughtful and gracious hosts you were during our stay in Jerusalem. Marla and I enjoyed our stay immensely, and we are very grateful. Also, I found both the workshop and our pre-workshop meetings to be stimulating and valuable, and I'm thankful to have had the opportunity to participats. (Even though the rest of my summer is going to kill me!!!)

Two memos follow this message. The first is a proposal for a three-year plan of Monitoring, Evaluation, and Feedback. It is essentially the plan I presented at the Wednesday session of the workshop, with revisions that take account of the comments I received. Perhaps the most important comment was that the plan so far does not spell out the details of the system for monitoring / and feedback. I now recognize this, but am not prepared to propose a detailed plan at present. Instead, I propose that the system be designed (by Shulamith, the chief field researcher, and | wood possibly me) during the coming year.

Another important addition is that I mention the idea of using] participation rates (i.e., "head counts") as outcome indicators in the second report from field researchers in the lead communities.

I discussed the question of two half-time versus one full-time field researcher with my colleague Gary Wehlage, who runs an evaluation project for the Casey Foundation's New Futures Initiative (an effort to improve urban education). He has found advantages to having two half-time researchers, but only when he's been able to get the half-time staff to share ideas. This / which may be a moot point if the budget or the personnel are limited, | 20 but I am worried about the ability of one researcher to handle the job in a large city. I mention this issue in the memo.

Another revision is that in the section on developing outcomes, I included three sources of information which the research advisory committee would ultimately consider the paper reflecting views (Ed) by national organizations; poperative goals of programs in the

lead communities; and conceptions of the educated Jew developed at the Mandel Institute.

I did not include provisions for control groups, for reasons I explained at the workshop. I added mention of the possibility of comparing changes in participation rates in lead communities with those in other communities, but cautioned that changes in lead communities could not be unambiguously ascribed to the programs. I did not discuss the idea of Cleveland a practice site for research, mainly because I couldn't figure out how I could do it, but I think the idea has merit.

The second memo is a proposal for a role I could play in this process. It is the same as we discussed prior to the workshop, with two revisions: (a) I propose to spend 12 (not 10) hours per month on the project; (b) I limit my involvement while I am in Scotland, acknowledging that the chief field researcher would be pretty much on his/her own during the academic year 1992-93.

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I offer the second memo as a proposal for my involvement, not just as a statement of what my role could possibly be. In other words, if this job makes sense to you, and the time commitment is acceptable, I'm willing to attempt it.

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No. 2

28-JUL-1991 08:24:19.03

From: HUJICC::BITNET%"GAMORAN@WISCSSC"

To: ANET@HUJIVMS GAMORAN@WISCSSC (M GAMORAN.MAIL EBCDIC)

Subj: memo on Monitoring, Evaluation, and Feedback project

Received: by HUJIVMS via NJE (HUyMail-V6c); Sun, 28 Jul 91 08:24:18

Date: Sat, 27 Jul 91 22:11 CDT

From: GAMORAN@WISCSSC

Subject: memo on Monitoring, Evaluation, and Feedback project

To: ANET@HUJIVMS Original To: ANNETTE

Monitoring, Evaluation, and Feedback: A Three-Year Outline Adam Gamoran University of Wisconsin, Madison July, 1991

This memo proposes a plan for the monitoring, evaluation, and feedback component of the CIJE. The plan contains three elements: / field research in lead communities; development of outcomes and tools for measuring outcomes; and stimulation of self-contained?] research projects. Tasks are described for the first three years, beginning fall 1991. Explanations of rationales are drawn in part to we from my earlier memo. - -

FIELD RESEARCH IN LEAD COMMUNITIES

Studying the process of change in lead communities should be a major component of the CIJE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation. Suppose despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the ghes the gardo innovation broke down.

Field researchers. At least one half-time field researcher would be hired for each community. Although budgetary and personnel constraints are likely to constrain the number of researchers the CIJE is able to hire, we should be aware that the depth of monitoring, evaluation, and feedback will be related to the number of researchers supported by the CIJE. I estimate that one half-time researcher would be able to provide the level of detail described in this memo if the size of the Jewish community is approximately 50,000 or smaller.

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Field researchers would have the following responsibilities:

- Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities.
- 2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.
- 3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery prist-way geedbacks? Ongo system, broadly conceived.
- 4. Write a nine-month report describing items 1-3 (May 1993). An important contribution of the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CIJE. Idem organite
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It may be possible to compare changes in rates of participation live to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of Hebrew school attendance after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The 21-month reports would serve as both formative and summative evaluation for the local commissions and the CIJE. In other words, they would not only encourage improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

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Collection of achievement and attitudinal data. Some of the participants at the July, 1991 Jerusalem workshop advocated administering such achievement tests and attitudinal questionnaires as are currently available. This effort would require another researcher dedicated to the task. Much work remains to be done in locating and selecting among available tests and survey items.



DEVELOPMENT OF OUTCOMES

It is widely recognized that the question of the outcomes of Jewish education, which was not addressed in the Commission report, cannot be avoided by the CIJE. This is not only a practical necessity, but a requirement of the research project: to evaluate the success of programs in the lead communities, one must know the criteria by which they are to be evaluated. Hence, the research project will take up the issues of (a) what are the aims of Jewish education; and (b) how can those aims, once defined, be measured?

Proposed tasks for this component of the project for the first two years are:

1. Commission a thought paper by an experienced professional on the outcomes of Jewish education. Guidelines for the paper would include: (a) The focus would be concrete rather than vague. This might be accomplished by posing the question as, "If you were to evaluate the outcomes of Jewish education, what would you look at?" (b) Outcomes should be addressed in the areas of cognition, attitudes, values/beliefs, practices, and participation.

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- 2. Distribute the paper for comments to national/continental organizations for feedback.
- 3. Engage the original writer to expand the paper in light of feedback received from the major organizations. The revision should include an analysis of points of agreement and disagreement among the organizations.
- 4. Present the ravised paper to the research advisory group, posing the following questions: (a) What do you make of this set of outcomes? (b) How might they be measured?

The research advisory group would have two additional sources of information to consider: the operative goals of programs in lead communities, as described by field researchers in their 9-month reports; and conceptions of the educated Jew developed by the Mandel Institute.

5. Commission appropriate experts to begin selecting or creating outcome indicators.

STIMULATION OF SELF-CONTAINED RESEARCH PROJECTS

At any time during the process, the CIJE may require urgent attention to specific issues of educational effectiveness. (An example might be the relative effectiveness of supplementary school and summer camp attendance for Jewish identification.) After developing an internal consensus, CIJE would either (1) issue a request for proposals on that topic, or (2) recruit and commission individual to carry out the research project.

TIMELINE

		FIELDWORK	OUTCOME DEVELOPMENT
	Fall 1991	create job description	commission paper
	Spring 1992 July 1992	oversee hiring, training	approve first paper
to con (Fall-Spring, 1992-93	fieldwork underway	responses to paper from national orgs.
	May 1993	9-month reports	revise paper
	August 1993		meet with research advisory committee
	Fall-Spring, 1993-94	fieldwork continues	davalop outcome 1993-94 indicators
Total	May 1994	21-month reports	

No. 3

28-JUL-1991 08:24:34.84

From: HUJICC::BITNET&"GAMORAN@WISCSSC"

To: ANET@HUJIVMS <M=> GAMORAN@WISCSSC (M GAMORAN.MAIL EBCDIC)

CC:

Subj: memo on a role for me in the MEF project

Received: by HUJIVMS via NJE (HUYMail-V6c); Sun, 28 Jul 91 08:24:34

Date: Sat, 27 Jul 91 22:12 CDT

From: GAMORAN@WISCSSC

Subject: memo on a role for me in the MEF project To: ANET@HUJIVMS Original To: ANNETTE

July 26, 1991

To: Seymour Fox, Annette Hochstein From: Adam Gamoran CC: Shulamith Elster Re: my participation in the CIJE research project

This memo is to clarify my proposed involvement in the CIJE research project, as developed during our meetings prior to the Jerusalem workshop. I am happy to listen to any clarifications or modifications you may wish to offer.

The job would be that of a consultant to the CIJE, and would report to the CIJE director. It is important that the position be one of a colleague rather than a subordinate of the Chief Education Officer, to encourage constructive criticism of the educational programs supported by the CIJE in the lead communities.

PERM

In this position, I would be responsible for ensuring (a) the quality of fieldwork in lead communities; and (b) progress in the development of indicators of the outcomes of Jewish education. My time commitment would be limited to twelve hours per month during the time periods specified. My tasks would be as follows:

FIRST PRELIMINARY PHASE: OCT. - DEC. 1991

A. Field research

- 1. Prepare a job description for the field researchers and the chief field researcher. The description would include such items as rationale, fieldwork tasks, reporting requirements, standards, and expectations.
- 2. Circulate the job description for feedback from (a) those involved with the CIJE, especially those who participated in the July 1991 CIJE workshop; and (b) colleagues with expertise in the fields of evaluation and qualitative research, such as Gary Wehlage, Mary Metz and Karen Seashore Louis.
- 3. Revise the job description and present it to the director of CIJE.

B. Outcome development

1. Work with Shulamith to prepare a brief description of what the outcome paper might entail. If possible, advise Shulamith on whom to hire for the paper.

SECOND PRELIMINARY PHASE: JAN. - JULY 1992

A. Field research

- 1. The CIJE director and chief education officer will hire the field researchers. I would participate in the final interview stage of selection.
- 2. Work with Shulamith and the chief field researcher to establish a monitoring and feedback system: Specify main areas of focus, procedures, forms, etc., as much as is possible in advance.
- 3. Participate in an initiatory meeting with all the field researchers. The main purpose of the meeting would be for the chief field researcher to train the other field workers, based on the monitoring plans we have worked out.
- 4. Remain in regular contact with the chief field researcher and V provide assistance as needed.

B. Outcome development

1. Provide continuous feedback to the paper author. Approve final version of the initial draft of the paper, July 1992.

YEAR 1 OF LEAD COMMUNITIES: SEP. 1992 - JUNE 1993

A. Field research

1. This period of the fieldwork project is problematic for me because I will be out of the country. Although I can provide feedback on written discussions of fieldwork findings, I will not be available to participate in quarterly meetings of the fieldwork team. Responsibility for supervision will rest with the chief field researcher. I will review the nine-month reports of the field researchers which are due during this period.

B. Outcome development

1. Advise the author of the thought paper on revisions in response to reaction from diverse representatives of the American Jewish community. Approve final version of the expanded draft of the paper.

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2. Prepare agenda, attend, and lead a meeting of the research advisory committee to discuss (a) their views of the outcomes described in the paper and (b) their suggestions for approaches to measuring these outcomes.

YEAR 2 OF LEAD COMMUNITIES: SEP. 1993 - JUNE 1994

A. Field research

1. Establish a mechanism for developing instruments for measuring outcomes of Jewish education, according to (a) the outcomes paper completed in year 1; (b) reports of operative outcomes uncovered in the lead communities; (c) conceptions of the educated Jew developed at the Mandel Institute; and (d) suggestions from the research advisory committee in response to these sources of information.

YEAR 3 OF LEAD COMMUNITIES: SEP. 1994 - JUNE 1995

If all goes as planned in the preceding three years, we may be ready at this time to begin a quantitative study of the outcomes of education in the lead communities and elsewhere. Taking the outcome indicators we will have developed, we may be able to assess standards in the lead communities and compare them to standards elsewhere. This cannot be viewed conclusively as a causal analysis, but it will be an attempt to validate the conclusions of the field work, which will presumably continue through this year.

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AND
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OF

University of Wisconsin-Madison Wisconsin Center for Education Research 1025 W. Johnson St. Madison, WI 53706 (608) 263-7575

For Annette

July 26, 1991

SCHOOLS

To: Seymour Fox, Annette Hochstein

From: Adam Gamoran CC: Shulamith Elster

Re: my participation in the CIJE research project

This memo is to clarify my proposed involvement in the CIJE research project, as developed during our meetings prior to the Jerusalem workshop. I am happy to listen to any clarifications or modifications you may wish to offer.

The job would be that of a consultant to the CIJE, and would report to the CIJE director. It is important that the position he one of a colleague rather than a subordinate of the Chief Education Officer, to encourage constructive criticism of the educational programs supported by the CIJE in the lead communities.

In this position, I would be responsible for ensuring (a) the quality of fieldwork in lead communities; and (b) progress in the development of indicators of the outcomes of Jewish education. My time commitment would be limited to twelve hours per month during the time periods specified. My tasks would be as follows:

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A. Field research

- 1. Prepare a job description for the field researchers and the chief field researcher. The description would include such items as rationale, fieldwork tasks, reporting requirements, standards, and expectations.
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- 3. Revise the job description and present it to the director of CIJE.

B. Outcome development

1. Work with Shulamith to prepare a brief description of what the outcome paper might entail. If possible, advise Shulamith on whom to hire for the paper.

SECOND PRELIMINARY PHASE: JAN. - JULY 1992

A. Field research

1. The CIJE director and chief education officer will hire the field researchers. I would participate in the final interview stage of selection.

- 2. Work with Shulamith and the chief field researcher to establish a monitoring and feedback system: Specify main areas of focus, procedures, forms, etc., as much as is possible in advance.
- 2. Participate in an initiatory meeting with all the field researchers. The main purpose of the meeting would be for the chief field researcher to train the other field workers, based on the monitoring plans we have worked out.
- 3. Remain in regular contact with the chief field researcher and provide assistance as needed.

B. Outcome development

1. Provide continuous feedback to the paper author. Approve final version of the initial draft of the paper, July 1992.

YEAR 1 OF LEAD COMMUNITIES: SEP. 1992 - JUNE 1993

A. Field research

1. This period of the fieldwork project is problematic for me because I will be out of the country. Although I can provide feedback on written discussions of fieldwork findings, I will not be available to participate in quarterly meetings of the fieldwork team. Responsibility for supervision will rest with the chief field researcher. I will review the nine-month reports of the field researchers which are due during this period.

B. Outcome development

- 1. Advise the author of the thought paper on revisions in response to reaction from diverse representatives of the American Jewish community. Approve final version of the expanded draft of the paper.
- 2. Prepare agenda, attend, and lead a meeting of the research advisory committee to discuss (a) their views of the outcomes described in the paper and (b) their suggestions for approaches to measuring these outcomes.

YEAR 2 OF LEAD COMMUNITIES: SEP. 1993 - JUNE 1994

A. Field research

1. Establish more frequent contacts with the chief field researcher, and participate in quarterly meetings with the fieldwork team. Provide feedback on preliminary papers leading up to the 21-month reports from the lead communities.

B. Outcome development

1. Establish a mechanism for developing instruments for measuring outcomes of Jewish education, according to (a) the outcomes paper completed in year 1; (b) reports of operative outcomes uncovered in the lead communities; (c) conceptions of the educated Jew developed at the Mandel Institute; and (d) suggestions from the research advisory committee in response to these sources of information.

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If all goes as planned in the preceding three years, we may be ready at this time to begin a quantitative study of the outcomes of education in the lead communities and elsewhere. Taking the outcome indicators we will have developed, we may be able to assess standards in the lead communities and compare them to standards elsewhere. This cannot be viewed conclusively as a causal analysis, but it will be an attempt to validate the conclusions of the field work, which will presumably continue through this year.

Monitoring, Evaluation, and Feedback: A Three-Year Outline Adam Gamoran University of Wisconsin, Madison July, 1991

This memo proposes a plan for the monitoring, evaluation, and feedback component of the CIJE. The plan contains three elements: field research in lead communities; development of outcomes and tools for measuring outcomes; and stimulation of self-contained research projects. Tasks are described for the first three years, beginning fall 1991. Explanations of rationales are drawn in part from my earlier memo.

FIELD RESEARCH IN LEAD COMMUNITIES

Studying the process of change in lead communities should be a major component of the CIJE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation. Suppose despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

Field researchers. At least one half-time field researcher would be hired for each community. Although budgetary and personnel constraints are likely to constrain the number of researchers the CIJE is able to hire, we should be aware that the depth of monitoring, evaluation, and feedback will be related to the number of researchers supported by the CIJE. I estimate that one half-time researcher would be able to provide the level of detail described in this memo if the size of the Jewish community is approximately 50,000 or smaller.

Field researchers would have the following responsibilities:

- 1. Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities.
- 2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.
- 3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system, broadly conceived.
- 4. Write a nine-month report describing items 1-3 (May 1993). An important contribution of the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CIJE.

- 5. Replicate the initial data collection a year later, and continue monitoring progress toward the commission plan.
- 6. Issue a 21-month report (May 1994), which would describe educational changes that occurred during the first two years, and present an assessment of the extent to which goals have been achieved. Two types of assessment would be included: (a) Qualitative assessment of program implementation. (b) Tabulation of changes in rates of participation in Jewish education, which may be associated with new programs.

It may be possible to compare changes in rates of participation to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of Hebrew school attendance after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The 21-month reports would serve as both formative and summative evaluation for the local commissions and the CIJE. In other words, they would not only encourage improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

7. Field researchers would also serve as advisers to reflective practitioners in their communities (see below).

Schedule. During fall 1991, a job description and list of qualifications would be prepared. The researchers would be hired and undergo training during spring and summer 1992. During this period, further details of the monitoring and feedback system would be worked out. The fieldwork itself would begin in late summer or early fall 1992.

<u>Chief field researcher.</u> One of the field researchers would serve as chief field researcher. The chief filed researcher would work full-time. In addition to studying his or her community, the chief field researcher would be responsible for training the others and coordinating their studies.

Reflective practitioners. In each lead community, two or more reflective practitioners would be commissioned to reflect on and write about their own educational efforts. The reflective practitioners, who could be selected by their local councils, would be teachers or administrators involved in CIJE programs with reputations for excellent practice, or who are attempting to change their practices substantially. The local field researchers would supervise and advise the reflective practitioners.

Collection of achievement and attitudinal data. Some of the participants at the July, 1991 Jerusalem workshop advocated administering such achievement tests and attitudinal questionnaires as are currently available. This effort would require another researcher dedicated to the task. Much work remains to be done in locating and selecting among available tests and survey items.

DEVELOPMENT OF OUTCOMES

It is widely recognized that the question of the outcomes of Jewish education, which was

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Proposed tasks for this component of the project for the first two years are:

- 1. Commission a thought paper by an experienced professional on the outcomes of Jewish education. Guidelines for the paper would include:
 - (a) The focus would be concrete rather than vague. This might be accomplished by posing the question as, "If you were to evaluate the outcomes of Jewish education, what would you look at?"
 - (b) Outcomes should be addressed in the areas of cognition, attitudes, values/beliefs, practices, and participation.
- 2. Distribute the paper for comments to national continental organizations for feedback.
- 3. Engage the original writer to expand the paper in light of feedback received from the major organizations. The revision should include an analysis of points of agreement and disagreement among the organizations.
- 4. Present the revised paper to the research advisory group, posing the following questions:
- (a) What do you make of this set of outcomes?
- (b) How might they be measured?

The research advisory group would have two additional sources of information to consider: the operative goals of programs in lead communities, as described by field researchers in their 9-month reports; and conceptions of the educated Jew developed by the Mandel Institute.

5. Commission appropriate experts to begin selecting or creating outcome indicators.

STIMULATION OF SELF-CONTAINED RESEARCH PROJECTS

At any time during the process, the CIIE may require urgent attention to specific issues of educational effectiveness. (An example might be the relative effectiveness of supplementary school and summer camp attendance for Jewish identification.) After developing an internal consensus, CIIE would either (1) issue a request for proposals on that topic, or (2) recruit and commission individual to carry out the research project.

PROPOSED TIMELINE

	FIELDWORK	OUTCOME DEVELOPMENT
Fall 1991	create job description	commission paper
Spring 1992	oversee hiring, training	
July 1992		approve first paper
Fall-Spring, 1992-93	fieldwork underway	responses to paper from national orgs.
May 1993	9-month reports	revise paper
August 1993		meet with research advisory committee
Fall-Spring, 1993-94	fieldwork continues	develop outcome indicators
May 1994	21-month reports	

University of Wisconsin-Madison

MADISON, WISCONSIN \$3705

DEPARTMENT OF SOCIOLOGY SOCIAL SCIENCE BUILDING 1180 OBSERVATORY DRIVE

TO	CAL	L WRI	TER	DIRECT
PH	ONE	(808)_		

May 30, 1991

Professor Seymour Fox Hebrew University of Jerusalem

Dear Professor Pox,

I'm pleased to report that I will be able to meet with you in Jerusalem this July, during the time period you specified. My wife, Marla, will accompany me. Our time constraints are as follows: we can come for a week, and we need to leave Hadison after July 5 and return before July 19. (I have firm commitments on those two dates.) With Harla to visit the relatives, I can be at your disposal for the meetings! Seriously, I very much appreciate your inviting me to bring Marla on the trip.

A quick check with our travel agent indicated that seats are filling up, so we'd like to know the exact dates as soon as possible. We will be away from Madison during the last two weeks of June, and I'm sure we'll want to book our seats before then.

I look forward to productive and interesting meetings. Based on our phone conversations, I will think more about possible tasks for the research project, and how they might be organized. I'll try to send some notes on these issues to serve as a springboard to our own discussions prior to the seminar.

Sincerely yours,

Adam Gamoran Associate Professor For the Advanced Study and Development of Jewish Education

Board of Directors (in formation)

May 13, 1991

Morton L. Mandel Chairman

Dr. Adam Gamoran

University of Wisconsin at Madison

Wisconsin Center for Educational Research

Marc Besen Australia

1025 W. Johnson St.

Jaime Constantiner Mexico

Madison, WI 53706

Isaac Joffe

USA

South Mirica

Dear Adam,

Felix Posen UK

Esther Leah Ritz

U.S.A.

Garry Stock

Australia

Thank you very much for your fax of May 6th. We are very pleased that you have devoted so much time and effort to thinking about the problem, and we have managed to have a faculty seminar to discuss the various ideas that you presented. We think it might be best if we continued our discussion on a conference call between Annette Hochstein, myself and yourself. Would the morning of Sunday, June 2nd or Tuesday, June 4th be acceptable to you?

Seymour Fox President

Annette Hochstein Director

The reason for the delay is that we are having the board meetings of the Mandel Institute beginning this Friday, and I am travelling to England May 14-16th. At the board meeting we expect to deal with the administrative and financial questions that you raised, and are hoping to receive affirmative responses.

We look forward to continuing the conversation with you. During the telecon it may be a good idea for us to consider the usefulness of a visit of yours to Israel sometime in the month of July.

With very best regards, and thanking you again for taking all that time,

Sincerely yours,

Seymour Fox

c.c.: WAnnette Hochstein James Coleman

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Dr. Seymour Fox and Dr. Annette Hochstein Hebrew University of Jerusalem Post-It" brand fax transmittal memo 7671 Not pages > 4

To Se YMOUT Fox From Adam Gamora.

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Dept. Education Form Form Form 263 263-4253

Fax 1 972 26999 51 Fax 68 263-6448

Show H. I.

May 6, 1991

Dear Drs. Fox and Hochstein,

Following our phone conversation, I am writing to share my thoughts about the possibility of research and evaluation in lead communities and other areas of Jewish education in North America. Since our talk, I've had a long conversation with Jim Coleman, and I've done some thinking both about the project generally and about my own potential participation. My feelings are still mixed as to what role is appropriate for me, and this letter is in part an opportunity for me to explore the relevant concerns. I have a number of comments and questions, mainly in three entegories: substance of research, design of research, and my participation.

First, though, let me say that I find the whole enterprise impressive and exciting. The Report is impressive not only in scope and ambition, but in its specificity: no other major reform document that I can think of indicates clear-cut and short-term changes along with the long-term and more abstract goals. One has only to compare A Time to Act with "America 2000" (Bush's recent education manifesto) to appreciate the specificity of the former. I am also especially encouraged by the emphasis on strengthening and expanding the base of research on Jewish education.

Substantive Issues

If I understand the plan in the Report, the primary issue for research must be the evaluation of specific programs taking place in the lead communities, with the goal of disseminating knowledge about these programs to the wider Jewish education audience. As was mentioned in our phone conversation, this evaluation process will not be one in which the researchers are completely outside the reform process; rather there will be continuous feedback between the researchers and the educators in the lead communities. Thus, the project would involve both formative and summative evaluation.

As I said on the phone, the central problem for this investigation is the identification of outcomes. Selecting and/or developing indicators would need to be a primary task in the early years of the program. Such indicators would include those at the individual level (cognitive, affective, and behavioral) and at the community level (possible indicators include rate of teacher turnover, rate of educational participation, rate of intermarriage; etc.).

At the same time, the research should probably give equal weight to studying the process of change, especially during the early years. In the lead communities, what organizational mechanisms are used to foster change? What are the barriers to change, and how might they be surmounted? To what extent can we attribute successful innovations to the charisma and drive of particular individuals, and to what extent can we identify organizational conditions that supported successful change? These questions are critical if the lead communities are to serve as models for Jewish educational improvement throughout North America.

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Studying the process of change becomes more critical when we recognize that the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it would be important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation. Suppose despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

Aside from these issues, which are paramount from the practical side, there are other points which are of special interest to a sociologist of education. These concerns are intellectually provocative to me because of my long-standing interest in the effects of educational "treatments" on outcomes; other researchers would obviously find different issues of special interest.

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Wide range of treatment. In research on secular education in western countries, a major problem for studying the effects of schooling on achievement and other outcomes is that there is relatively little variation in the quality of schooling. In contrast, the range of educational experiences in Jewish education is enormously diverse, ranging, as Jim Coleman pointed out to me, from zero to total immersion. Yet to date, the best studies of the effects of Jewish education deal with only a restricted range of the total variation (Sunday school, afternoon school, and day school). By considering the full array of Jewish educational experiences of the youth of the lead communities (e.g., by including summer camps, Israel trips, and youth groups, as well as schools), the project could provide a better analysis of the effects of educational treatments on outcomes than has been possible in the past.

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Emphasis on communities. Currently, there is a fair amount of attention to connections hetween schools and communities in the wider educational literature. The research agenda has at least two dimensions: studying the coordination (or its absence) between schools and other social service delivery agents; and the social networks among teachers, parents, students, and other members of the community (as in Coleman and Hoffer, 1987). Both of these issues could be fruitfully examined in the Jewish education context.

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The Report is quite explicit in calling for community-wide emphasis on education. This may take the form of increased cooperation among the Jewish schools and other Jewish institutions in the communities. If so, the process and its results would be interesting to a broad audience for both practical and theoretical reasons. At the same time, the improvement effort may lead to stronger networks of support for education among students and their parents, and this would be equally interesting to study.



Design Issues

What might the research program involve? My first thoughts are that initially, the research would require two major efforts: fieldwork studies of the process of change; and conceptual and experimental (or piloting) work on indicators of outcomes. These thoughts presuppose that educational institutions in the lead communities are automatically receptive to research efforts.



Fieldwork. I would think that a half-time researcher would be needed in each lead

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community. The researchers would have doctoral training and fieldwork experience. Are funds available for such an effort?

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More generally, would the research program need to generate its own funds, or have the funds already been committed? *

The field researchers would be responsible for (1) describing the basic structure and operation of Jewish education in the community, broadly defined; (2) describing changes in those structures and processes; (3) relating these conditions to outcomes, in a qualitative sense, drawing on the subjective experiences and meanings of participants, as well as providing an external analysis of the cultural context and the quality of Jewish education in the community. Although much of their work would be done independently, these researchers would meet as a group at regular intervals (perhaps quarterly?) to exchange findings and critique one another's reports

In addition to the field researchers, I'd advocate "reflective practitioners." A few teachers and/or administrators in each community could be explicitly funded to carry out research on their own efforts, and those of their colleagues, with innovative educational programs.

As to the selection of communities, I have little to say. The only thing that occurs to me is that mid-sized Jewish communities would probably be best from the standpoint of organizing the research: Too small, and it may be difficult to find qualified field researchers; too large, and the community may be too complex for us to cope with (i.e., New York, Chicago, Los Angeles).

Development of indicators. Because of diverse skills and knowledge required for this aspect of the project, a team of researchers would be required, with skills in demography, social psychology, psychometrics, survey research, and Jewish content domains (Hebrew language, history, Bible, etc.). The team would have as its goals (1) to reach decisions on what outcomes, exactly, should be measured; and (2) the development of quantitative indicators of those outcomes.

For the lead communities, it would be preferable to gather baseline data from the very first year. This may be possible for demographic and school-organizational variables, but it is not likely feasible for affective and cognitive outcomes. I have little knowledge of survey and test instruments that are already available, but even if there are some, I would not be optimistic that they could be employed immediately, as one would prefer. However, the possibility should not be dismissed out of hand, for baseline data would be extremely valuable.

Subsequently, one should think about using the surveys and tests not only in the lead communities, but elsewhere, for comparative purposes. Assessment of causality is the central design problem for this part of the project. I am not sure that causal generalizations will in fact be possible, but I will think more on this. I would very much like to hear your views on this question.

My Role?

I have three major concerns: (1) Do I have the right blend of experience to lead this project? I would like you to know my academic background better, so I am sending you via regular airmail a copy of my c.v., a couple of recent articles, and the proposal for my research project in Scotland. (3) Do I have the time, in the very near future, to give the project the

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leadership it would need to get of the ground? (2) Long-term, if I were to carry out this work, would I be able to spend the time to make this a major effort of mine, while not rejecting the promising agenda I have already carved out for myself?

I would not be one of the field researchers in the lead communities. First, I am not trained as a qualitative researcher (though I am probably more sympathetic to it than most of my quantitative colleagues), and second, at this stage of my family life (my children are 6 years, 4 years, and 7 months old) I am not willing or able to do much out-of-town traveling. However, I would be able help with the recruitment, orientation, conceptualization, and criticism of the fieldwork efforts.

I know enough of organizational, community, and survey research to help with the development and implementation of some of the indicators. Also, I frequently make use in my research of standardized and other sorts of tests, and of psychological scales. However, I have at best rudimentary theoretical knowledge of what is involved in creating such indicators. Furthermore, I am no more than vaguely familiar with the tests and scales for Jewish education that are currently in use. My knowledge of Jewish content areas, although well above-average for an American Jew, is not expert in any area.

My short-term situation is as follows: During 1992-93, the year after next, I will be conducting research on curriculum change and inequality in Scottish secondary education. My family and I will spend the academic year in Edinburgh. During that period, I would not be able to devote much time to this project. For the coming year, 1991-92, I have been appointed associate chair of my department, and expect to spend about half my time on departmental administration. I will also be teaching half-time, not to mention several research commitments which must be satisfied before I leave for Scotland. Consequently, I just can't see how I could make this a major effort for the next two years; even a quarter-time involvement seems out of the question for the next two years. I'm not rejecting any involvement, but I am concerned about my ability to provide leadership during this period.

I have more flexibility for the long-term. I will again be departmental associate chair in 1993-94, but my research commitments for that period are not yet fixed. After that year, I have no present commitments.

I am eager to hear your views on what the research effort would consist of. Are my ideas consistent with your vision? Or do you have something different in mind? I would also like to hear what sort of time commitment you had in mind when you called; I realized I never asked. More generally, I look forward to your reactions to the ideas put forward in this letter. I am honored to be considered for leadership in this important effort.

Sincercly yours,

cc:

Adam Gamoran, Associate Professor of Sociology and Educational Policy Studies

P.S. Do you have an electronic mail address? My BITNET address is GAMORAN@WISCSSC. As I mentioned on the phone, my fax number is (608) 263-6448.

Professor James Coleman, Professor Daniel Pekarsky

VV

C.C. Anesto

CURRICULUM VITAE

NAME:

Adam Gamoran

DATE: May 1991

ADDRESS:

4730 Waukesha Street Madison, WI 53705

PRESENT RANK: Associate Professor

EDUCATION:

1984

Ph.D., University of Chicago (Education)

Program: Sociology of Education

1979

A.M., University of Chicago (Social Sciences)

1979

A.B., University of Chicago (Near Eastern Languages

and Civilizations)

POSITIONS HELD:

1989-present	Associate Professor of Sociology and Educational Policy Studies, University of Wisconsin, Madison
1988-1989	Assistant Professor of Sociology and Educational Policy Studies, University of Wisconsin, Madison
1984-1988	Assistant Professor of Sociology, University of Wisconsin, Madison
1983-1984	Lecturer in Social Sciences. Division of the Social Sciences, University of Chicago
1981-1984	Research Assistant to Robert Dreeben and Rebecca Barr, University of Chicago

Lecturer in English, Extension College of the Negev,

SPECIAL HONORS AND AWARDS:

1979-1980

1991-1992	Fulbright Scholar, United Kingdom (used in 1992-1993)
1989-1990	Spencer Fellow, National Academy of Education
1989	Citation for Excellence in Teaching, Department of Sociology, University of Wisconsin, Madison

Sha'ar HaNegev, Israel

1985 Outstanding Dissertation Award, Division G,

American Educational Research Association

1979 Phi Beta Kappa

DISSERTATION:

Title: "Teaching, Grouping, and Learning: A Study of the

Consequences of Educational Stratification."

Advisory Robert Dreeben, Chairman

Committee: Charles E. Bidwell, James S. Coleman

ARTICLES PUBLISHED OR IN PRESS:

Gamoran, Adam. 1986. "Instructional and Institutional Effects of Ability Grouping." <u>Sociology of Education</u>, 59, 185-198.

Dreeben, Robert, and Adam Gamoran. 1986. "Race, Instruction, and Learning." American Sociological Review, 51, 660-669.

Gamoran, Adam, and Robert Dreeben. 1986. "Coupling and Control in Educational Organizations." <u>Administrative Science Quarterly, 31, 612-632</u>. Reprinted in Jeanne H. Ballantine, <u>Schools and Society: A Unified Reader</u>. 2nd edition. Palo Alto: Mayfield, 1989.

Gamoran, Adam. 1987. "The Stratification of High School Learning Opportunities." <u>Sociology of Education</u>, <u>60</u>, 135-155.

Gamoran, Adam. 1987. "Organization, Instruction, and the Effects of Ability Grouping: Comment on Slavin's 'Best-Evidence Synthesis.'"

<u>Review of Educational Research</u>, 57, 341-345.

Gamoran, Adam, and Mark Berends. 1987. "The Effects of Stratification in Secondary Schools: Synthesis of Survey and Ethnographic Research." <u>Review of Educational Research</u>, 57, 415-435.

Gamoran, Adam. 1988. "Resource Allocation and the Effects of Schooling: A Sociological Perspective." Pp. 207-232 in D. H. Monk and J. Underwood (Eds.), <u>Microlevel School Finance: Issues and Implications for Policy</u>. Ninth Annual Yearbook of the American Educational Finance Association. Cambridge, MA: Ballinger.

Gamoran, Adam. 1989. "Rank, Performance, and Mobility in Elementary School Grouping." <u>Sociological Quarterly</u>, <u>30</u>, 109-123.

Gamoran, Adam. 1989. "Measuring Curriculum Differentiation." American Journal of Education, 97, 129-143.

Gamoran, Adam, and Robert D. Mare. 1989. "Secondary School Tracking and Educational Inequality: Compensation, Reinforcement, or Neutrality?" <u>American Journal of Sociology</u>, <u>94</u>, 1146-1183.

Gamoran, Adam. 1990. "Instructional Organizational Practices that Affect Equity." Pp. 155-172 in H. P. Baptiste, Jr., J. E. Anderson, J. Walker de Felix, and H. C. Waxman (Eds.), <u>Leadership</u>, <u>Equity</u>, <u>and School Effectiveness</u>. Newbury Park, CA: Sage.

Gamoran, Adam. 1990. "Civil Religion in American Schools." Sociological Analysis, 51, 235-256.

Nystrand, Martin, and Adam Gamoran. 1991. "Student Engagement: When Recitation Becomes Conversation." Pp. 257-276 in H. A. Walberg and H. C. Waxman (Eds.). Contemporary Research on Teaching. Berkeley, CA: McCutchan.

Gamoran, Adam. 1991. "Schooling and Achievement: Additive Versus Interactive Models." Pp. 37-51 in S. W. Raudenbush and J. D. Willims (Eds.), <u>International Studies of Schooling from a Multilevel Perspective</u>. San Diego: Academic Press.

Nystrand, Martin, and Adam Gamoran. In press. "Instructional Discourse. Student Engagement, and Literature Achievement." Research in the Teaching of English.

Oakes, Jeannie, Adam Gamoran, and Reba N. Fage. In press. "Curriculum Differentiation: Opportunities, Outcomes, and Meanings." In P. W. Jackson (Ed.), <u>Handbook of Research on Curriculu</u>m. New York: Macmillan.

Gamoran, Adam. In press. "Social Factors in Education." In M. Alkin (Ed.), <u>Encyclopedia of Educational Research</u>. 6th Edition. New York: Macmillan.

Gamoran. Adam, and Martin Nystrand. In press. "Background and Instructional Effects on Achievement in Eighth-Grade English and Social Studies." Journal of Research on Adolescence.

ARTICLE FOR EDUCATIONAL PRACTITIONERS:

Gamoran, Adam. 1990. "How Tracking Affects Achievement: Research and Recommendations." <u>National Center on Effective Secondary Schools</u>
<u>Newsletter</u>, 5, 2-6.

PAPERS PRESENTED AT PROFESSIONAL MEETINGS:

"Instructional, Institutional, and Social Effects of Ability Grouping." Paper presented at the Annual Meeting of the Midwest Sociological Society, Chicago: April 1984.

- "Egalitarian versus Elitist Use of Ability Grouping." Paper presented at the Annual Meeting of the American Educational Research Association, New Orleans: April 1984.
- "The Institutionalization of Educational Stratification." Paper presented at the Annual Meeting of the American Sociological Association, Austin, TX: August 1984.
- "Race, Instruction, and Learning." Paper presented at the Annual Meeting of the American Educational Research Association. Chicago: April 1985 (with Robert Dreeben).
- "Organizational and Institutional Determinants of Instructional Pacing." Paper presented at the International Seminar of the Research Committee on Sociology of Education, International Sociology Association. Tel Aviv. Israel: April 1985.
- "Coupling and Control in Educational Organizations." Paper presented at the Annual Meeting of the American Sociological Association, Washington, DC: August 1985 (with Robert Dreeben).
- "The Stratification of High School Learning Opportunities." Paper presented at the Annual Meeting of the American Educational Research Association. San Francisco: April 1986.
- "A Sociologist Measures Curriculum Differentiation." Didactic lecture presented at the Annual Meeting of the American Educational Research Association, Washington, DC: April 1987.
- "Secondary School Tracking and Stratification in the United States: Reinforcement, Compensation, or Neutrality?" Paper presented at the Annual Meeting of the American Educational Research Association, Washington, DC: April 1987 (with Robert D. Mare).
- "The Effects of Religious Participation among American Jewish Youth." Paper presented at the Research Network Conference on Research in Jewish Education, Los Angeles, CA: June 1987.
- "Instruction and the Effects of Schooling." Paper presented at the Annual Meeting of the American Sociological Association, Chicago: August 1987.
- "Instructional Organization and Discourse in the Middle School."
 Paper presented at the Annual Meeting of the American Educational
 Research Association, New Orleans: April 1988 (with Martin Nystrand).
- "A Multi-Level Analysis of the Effects of Tracking." Paper presented at the Annual Meeting of the American Sociological Association, Atlanta: August 1988.

"Student Engagement and Instructional Discourse." Paper presented at the Annual Meeting of the American Educational Research Association. San Francisco: April 1989 (with Martin Nystrand).

"Tracking and the Distribution of Status in Secondary Schools." Paper presented at the Annual Meeting of the American Sociological Association. San Francisco: August 1989.

"Classroom Instruction and the Effects of Ability Grouping: A Structural Model." Paper presented at the Annual Meeting of the American Educational Research Association. Boston: March 1990 (with Martin Nystrand and Mark Berends).

"Tracking, Instruction, and Achievement." Paper presented at the World Congress of the International Sociological Association, Madrid: July 1990 (with Martin Nystrand).

"Authentic Discourse in a Nonformal Educational Setting: The Jewish Summer Camp." Paper presented at the Annual Meeting of the Research Network on Jewish Education, New York: June 1990.

"Access to Excellence: Assignment to Honors English Classes in the Transition from Middle to High School." Paper presented at the Annual Meeting of the American Sociological Association, Washington. DC: August 1990.

"Alternative Uses of Ability Grouping." Paper presented at the Annual Meeting of the American Educational Research Association, Chicago: April 1991.

"Race and Track Assignment: A Reconsideration with Course-Based Indicators of Curricular Track Locations." Paper to be presented at the Annual Meeting of the American Sociological Association. Cincinnati: August 1991 (with Samuel R. Lucas).

INVITED PAPERS AND ADDRESSES:

"Teaching, Grouping, and Learning: A Study of Stratification in Schools." Dissertation award address to Division G of the American Educational Research Association, Chicago: April 1985.

"Schooling and Achievement: Additive versus Interactive Multi-Level Models." Paper presented at the International Conference on Multilevel Methods in Educational Research, Edinburgh, Scotland: August 1989.

"Student Achievement and the Quality of Instruction." Paper presented at the Conference on School Organization and Student Achievement, University of Notre Dame, Notre Dame, IN: April 1990. "The Effects of Ability Grouping in Ninth Grade English." Presentation to the National Academy of Education, Spencer Fellows Forum, Madison, WI: November 1990.

"The Variable Effects of Tracking: Inequality and Productivity in American High Schools." Paper presented at the Ogburn-Stouffer Center. University of Chicago, Chicago: November 1990.

BOOK REVIEWS:

Review of Jeannie Oakes, <u>Keeping Track: How Schools Structure</u>
<u>Inequality</u>. (New Haven: Yale University Press, 1985.) <u>American Journal</u>
of Education, 94, 268 272, 1986.

Review of Peter McLaren, <u>Schooling as a Ritual Performance: Towards a Political Economy of Educational Symbols and Gesture</u>. (London: Routledge and Kegan Paul, 1986.) <u>American Journal of Sociology</u>, <u>92</u>, 503-506, 1987.

Review of Linda M. McNeil, <u>Contradictions of Control: School Structure and School Knowledge</u>. (New York: Routledge and Kegan Paul, 1986). Administrative Science Quarterly, 33, 641-642, 1988.

Review of Krishnan Namboodiri and Ronald G. Corwin, editors, Research in Sociology of Education and Socialization. Vol. 9: Selected Methodological Issues. (Greenwich, CT: JAI Press, 1989.) Contemporary Sociology, 19, 612-613, 1990.

RESEARCH IN PROGRESS:

Analyzing data from a two-year study of tracking, instruction, and learning in middle and high school English and social studies classes. Between-track variation in instructional processes is a central focus. The transition from middle to high school stratification systems is another.

Developing and estimating a set of hypotheses about the relation between structural features of school tracking systems and the effects of tracking on achievement.

RESEARCH SUPPORT:

"The Consequences of Stratification in Elementary and High Schools." University of Wisconsin Graduate School, \$8145, 9/85 - 6/86.

"Measuring the Effectiveness of Elementary Schools." University of Wisconsin Graduate School, \$6694, 7/86 - 12/86.

"The Stratification of Learning Opportunities in Middle and High Schools." (Principal Investigator, with Martin Nystrand) Office of Educational Research and Improvement, National Center on Effective Secondary Schools, \$694,030, 12/85-11/90.

"Stratification, Opportunity, and Achievement." Spencer Foundation Fellowship to the National Academy of Education, \$30,000, 1989-1990.

"Tracking and the Education of the Disadvantaged." University of Wisconsin Graduate School, \$11,200, 9/90 - 6/91.

"National Center on Organization and Restructuring of Schools." (Principal Investigator, with 17 others.) Office of Educational Research and Improvement, \$7.2 million, 10/90-9/95.

Projects: "Conditions for Productive Discourse in Small Groups" (with Martin Nystrand, Courtney Cazden, and Elizabeth Cohen).
"Conditions of Success for Homogeneous and Heterogeneous Ability Grouping" (with Martin Nystrand).
"Organizational Factors Affecting Teacher Empowerment, Teaching, and Student Achievement" (with Andrew Porter).

Project Funding, Years 1 - 2: \$131,810, 10/90-9/92.

"Inner-City Schools and Student Achievement." Institute for Research on Poverty, U.S. Department of Health and Social Services, \$65,000, 7/91 - 6/93.

"Curriculum Reform, Standards, and Inequal ty in Scottish Secondary Education, 1980-1988." Spencer Foundation, 548,500, 9/92 - 5/93. Fulbright Commission, travel expenses.

COURSES TAUGHT:

Sociology 181, Honors Introductory Seminar: The Sociological Enterprise

Sociology 210, Introduction to Sociology

Sociology 632, Complex Organization

Sociology 648, Sociology of Education

Sociology 908, Seminar: Sociology of Education

Topic: Stratification in School Systems

Integrated Liberal Studies 255, Problems in Social Science Analysis (to be taught Fall 1991)

M.A. THESES SUPERVISED:

1988 Mark Berends: Leadership Strategies and Goal Consensus in Secondary Schools.

1989 Linzhu Tian: Track Position and Track Climate.

1990 Samuel R. Lucas: Course-based Indicators of Curricular Track Locations.

Sara Dorfman: Choosing a Math-Based Major.

PH.D. COMMITTEES:

1985 Elanor Scott Meyers: Professionalism and Centralization in the Free Church Tradition.

1987 Michiko Kawakubo: Perception of Authority, Control, and Commitment in Japanese Organization.

Hsiao-Chin Hsieh: Who Goes Where? The Determinants of Post-Compulsory Educational Placement in Urban Taiwan. (Education Policy Studies)

Lawrence C. Stedman: An Analysis of School Effectiveness Ratings and an Investigation of Effective Schools Characteristics. (Educational Policy Studies)

1990 Alexander K. Tyree, Jr.: School Effects on the Commitment of High School Teachings in the United States. (Educational Policy Studies)

Dae-dong Hahn: Post-high School Educational Differentiation and Stratification of Young Adults in the 1980s. (Educational Policy Studies)

READING COURSES SUPERVISED:

Fall and Spring, 1984-85: Sarah Bloom (Organization and Education in Summer Camps)

Fall 1985: Gloria Smyth (Human Resource Management)

Spring 1987: Katherine Campbell (Internship in Organizational Analysis)

Fall and Spring, 1988-89: Kathleen O'Connell (High School Dropouts)

Fall and Spring, 1990-91: Monica Vickman (Teacher Competency Assessment)

OTHER PROFESSIONAL EXPERIENCE:

1979-1980	English	Teacher,	Gotwirt	Comprehensive	High	School,
	Sderot.	Israel				

1980-1983 Assistant Director of Education, K.A.M. Isaian Israel Religious School, Chicago, Illinois

Summers Director, Camp Tikvah, Hoffman Estates, Illinois 1981-1983 1983-1984 Principal, Congregation Etz Chaim Religious School, Lombard, Illinois

DEPARTMENTAL COMMITTEE SERVICE:

Minors Committee, 1984-1987
Committee for the Evaluation and Improvement of Teaching, 1985-1986
Chair, Social Committee, 1985-1988
Assignment Committee, 1986
Chair, Undergraduate Honors Committee, and faculty adviser to Alpha Kappa Delta (undergraduate honors society), 1987-1991
Faculty Senator, 1989-1991
Department Associate Chair, 1991-1992, 1993-1994

UNIVERSITY SERVICE:

Royalty Fund Committee, School of Education, 1987
Standing Research Committee on the Education of Minorities in Wisconsin, 1989-1991
University Appeals Committee, 1989-1992
University Fellowship Committee: member, 1990; chair, 1991-1992

COMMUNITY SERVICE:

Faculty Advisor, OSR Union Institute Camp, Geonomowoe, Wisconsin, June 1985, 1989-1991.

"Religious Participation and Family Values among American Jewish Youth." Discussion led for the rabbinic faculty of the OSR Union Institute Camp. Oconomowoc, Wisconsin. July 1987.

"Ability Grouping in Elementary Schools." Workshop presentation for the staff of the Lincoln Elementary School, Kenosha, Wisconsin, August 1987.

"The Uses and Abuses of Ability Grouping." Lecture and workshop for area principals and school district staff. University of Wisconsin-Extension, University of Wisconsin, Parkside, March 1988.

Consultant on survey of listener-sponsors, WORT Community Radio. Spring 1988.

"Curriculum Tracking and Access to Knowledge." Presentation to the College Board School-College Collaboration Program, Lake Geneva, WI: June 1988.

"Equality in Educational Achievement." Four-day program for "College for Kids." University of Wisconsin-Extension, Madison, June 1988; July 1989.

"Authentic Discourse in the Classroom." Presentation to The Principal's Workshop, Board of Jewish Education of Metropolitan (hicago, held in Madison, WI, November 1989.

"Authentic Discourse in the Summer Camp." Discussion led for the rabbinic faculty of the OSR Union Institute Camp. Oconomowoc. Wisconsin. June 1990.

"Ability Grouping and Achievement." Presentation to the Pennsylvania Superintendents' Study Council, held in Madison, WI: October 1990.

"How Tracking Affects Achievement: Research and Recommendations," and 'A Closer Look at Tracking in Secondary Schools." Lecture and workshop for the Greenwich Public School System, Greenwich, CT. November 1990.

PROFESSIONAL ACTIVITIES AND ASSOCIATIONS:

Faculty Affiliate, Institute for Research on Poverty, 1990-present Executive Board Member, 1990-present

Faculty Associate, Wisconsin Center for Education Research, 1985-present

Council Member, Sociology of Education Section of the American Sociological Association, 1986-1989

Chair, Nominating Committee, Sociology of Education Section of the American Sociological Association, 1989

Advisory Board Member. American Journal of Education, 1990-1992

Editorial Board Member, Sociology of Education, 1987-1990

Student Editor, <u>American Journal of Education</u>, 1983-1984

Referee.

Administrative Science Quarterly
American Educational Research Journal
American Journal of Education
American Journal of Sociology
American Sociological Review
Journal for Research in Mathematics Education
Journal of Research on Adolescence
National Science Foundation
Office of Educational Research and Improvement
Review of Educational Research
Social Forces
Social Science Quarterly
Sociology of Education

Assistant Program Chair, Division G of the American Educational Research Association, San Francisco: April 1992.

Program Chair, Research Network Conference on Jewish Education, Cleveland: June 1991.

Respondent, Session on "The Research University and Jewish Education." Research Network Conference on Jewish Education, Chicago: June 1989.

Discussant, Session on "Jewish Education of Parents and Children." Research Network Conference on Jewish Education, Philadelphia: June 1988.

Organizer, Symposium on "Stratification in Schools: International Perspectives." Annual Meeting of the American Educational Research Association, Washington, DC: April 1987.

Critic, Session on "Student Misbehavior." Annual Meeting of the American Educational Research Association, Chicago: April 1985.

Organizer, Session on "Complex Organizations." Society for Social Research, Spring Institute, Chicago: April 1984.

Member: American Sociological Association

American Educational Research Association International Sociological Association National Society for the Study of Education