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

Box	Folder
D-1	1935

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

Jack Ukeles
Ginny Levy
Arnette Hochstein
Steve Hoffman
Henry Zucker

FAX TRANSMITTAL

			DATE	TIME
			6/21/93	

PLEASE RUSH TO	NAME	COMPANY	FAX #
	Shmuel Wygoda	Mandel Institute	011

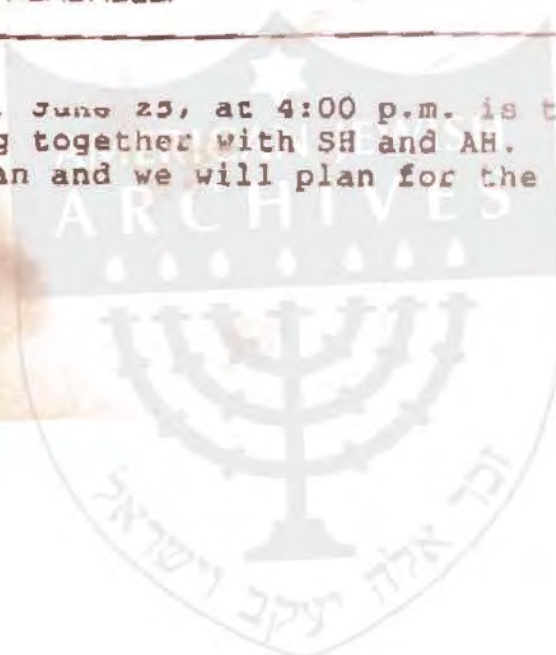| FROM	NAME	JEWISH COMMUNITY FEDERATI
	Stephen H. Hoffman	1750 Euclid Avenue Cleveland, Ohio 44115 Phone: 216-566-9200 Fax #: 216-566-9084

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1

MESSAGE

Friday, June 25, at 4:00 p.m. is the best possibility for getting together with SH and AH. I will notify Darrell Friedman and we will plan for the meeting at that time.

** TOTAL PAGE.0

FAX TRANSMITTAL

	DATE 6/18/93	TIME

PLEASE RUSH TO	NAME Shmuel Wygoda	COMPANY Mandel Institute	FAX NC 972

FROM	NAME Stephen H. Hoffman	JEWISH COMMUNITY FEDERATI 1750 Euclid Avenue Cleveland, Ohio 44115 Phone. 216-566-9200 Fax #: 216-566-9084

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MESSAGE

Darrell Friedman and I are tied up from 7.45 a.m. to 3:30 p.m. Friday, June 25, and Sunday, June 27, but could meet with you before or after these times.

Darrell is leaving Sunday night.

** TOTAL PAGE.0

FAX TRANSMITTAL		DATE 6/14/93	TIME 3:
PLEASE RUSH TO	NAME Shmuel Wyqoda	COMPANY Mandol Institute	FAX NO 216
FROM	NAME Stephen H. Hoffman	JEWISH COMMUNITY FEDERATI 1750 Euclid Avenue Cleveland, Ohio 44115 Phone: 216-566-9200 Fax #: 216-566-9084	

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MESSAGE

Darrell Friedman is out of town. Due back Wednesday.

I will speak to him before I leave for Israel and will let yo know the appointment options as soon as possible.
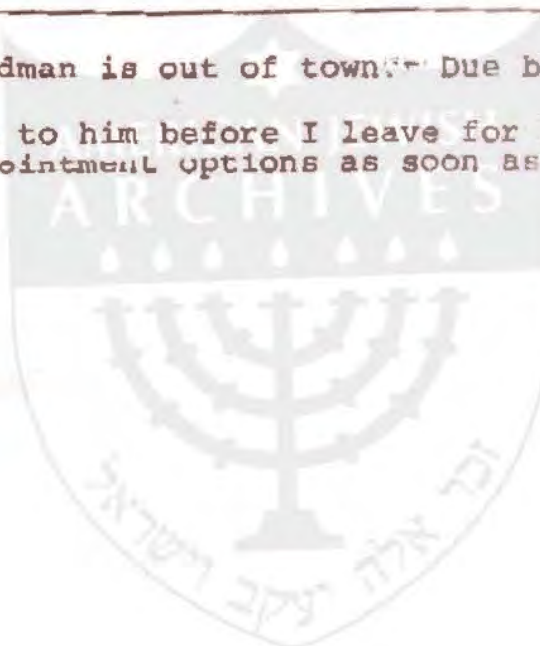
** TOTAL PAGE.01

THE JEWISH COMMUNITY FEDERATION OF CLEVELAND

1750 EUCLID AVENUE · CLEVELAND, OHIO 44115 · PHONE (216) 566-9200 · FAX # (216) 861-1230

June 8, 1993

M E M O R A N D U M

TO: Virginia Levi

FROM: Stephen H. Hoffman

I talked with David Sarnat and told him that Seymour had a
good talk with David Blumenthal at Emory. David also
described for me the political process they are following to
bring the rabbis and the JCC together in Atlanta, and I
think it is a good process.

SHH:gc
B3:03A

FAX TRANSMITTAL		DATE 5/4/93	TIME 4:40
PLEASE RUSH TO	NAME Seymour Fox Annette Hochstein	COMPANY	FAX NO. 011-972-2-619-951
FROM	NAME Steve Hoffman	JEWISH COMMUNITY FEDERATION 1750 Euclid Avenue Cleveland, Ohio 44115 Phone: 216-566-9200 Fax #: 216-566-9084	

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MESSAGE

The detailed agenda was terrific. Dave Sarnat himself will
be coming in for the consultation. He'll arrive Tuesday
evening with me and will stay all day Wednesday.

Steve,

** TOTAL PAGE.01 **

פוֹס פילה פּלקט אוֹסר!

·סֶ פּלֶקם ועֶלם לֶבֶךְ פּמֶסא ועֶןך.

MAY 2 0 1993

THE JEWISH COMMUNITY FEDERATION OF CLEVELAND
1750 EUCLID AVENUE · CLEVELAND, OHIO 44115 · PHONE (216) 566-9200 · FAX # (216) 861-1230

May 19, 1993

M E M O R A N D U M

TO: Morton L. Mandel   cc: Virginia Levi
        Henry L. Zucker

FROM: Stephen H. Hoffman

David Sarnat called the other day to tell me that Gerald Cohen,
the CIJE board member from Atlanta, would like to retire from
active duty. Gerald is an older member of our board, though he
has been a faithful attendee. You may remember that we had to
encourage Gerald to join the board because he was reluctant to
travel even then. He is a past president of the Atlanta
Federation and a major supporter of Jewish education and
conservative Judaism in Atlanta. He's also just a wonderful human
being.

David has suggested that we consider replacing Gerald with another
Atlanta leader, Jay Davis, a young man in his early 40s. He and
his father (who is 85) gave a million dollars to the Atlanta
Federation for an endowment in Jewish education. David tells me
that Jay is still being developed as a constructive leader and is
in need of a significant amount of support and education as to
community process, politics, etc. It was David's suggestion that
we consider inviting the three execs of our lead communities to
CIJE board meetings in the future. This would give David a
"cover" to be in attendance and to help with the education and
cultivation of Jay Davis.

I think we should consider this recommendation positively. The
more young, potentially significant players we can identify in the
communities, the easier our job will be, and we will also be doing
a service for our lead communities, such as I think we are doing
with Dan Bader in Milwaukee.

You will, I believe, also be pleased to know that David was much
more positive coming out of the staff meetings with the lead
communities last week than he was going in. Coming from David,
this is "high praise." His usual style is to tell you nothing
when he's happy and only to let you know when he's not.

SHH:gc
B3:15A

a - F.Y.I. - given to
O. Suzanne ('s opit.)
good!
For next CIJE x
MLM telecon

THE JEWISH COMMUNITY FEDERATION OF CLEVELAND
1750 EUCLID AVENUE · CLEVELAND, OHIO 44115 · PHONE (216) 566-9200 · FAX # (216) 861-1230

May 18, 1993

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

To Seymour Fox	From Steve Hoffman
Annette Hochstein	
Co.	Co.
Dept.	Phone # 216/526-9200
Fax # 011-972-2-619951	Fax # 216/526-9084

M E M O R A N D U M

TO: Morton L. Mandel   cc: Seymour Fox
       Henry L. Zucker   Annette Hochstein

FROM: Stephen H. Hoffman

I had a conversation today with Marty Kraar, at Hank Zucker's suggestion, about the confusion around the role of CIJE in the community and the proposed role of CJF's new Commission on Jewish Identity and Continuity.

Our conversation was brief. Marty was not aware that on at least two occasions, at the CJF Board Institute in Phoenix and the most recent Quarterly in Washington, that Marvin Lender had had a difficult time responding to questions as to the different purposes of CIJE and CJF's new initiative.

Marty was surprised by my raising the issue since Mort had not raised it with him on a couple of occasions in the past few months when they were together and discussing, I assume, CJF's affairs. I indicated that it was of increasing interest to us.

Marty offered the opinion that the CIJE is perceived at CJF on the same level as the Crown Family's initiative, the Covenant Foundation. I suggested to Marty that CIJE had a broader objective and ultimately envisioned a more encompassing intervention in Jewish continuity life in the United States. Marty acknowledged that that might be the case but that the CJF officers did not necessarily see it that way. I suggested that this could be the source of some friction down the road.

I offered the recommendation that this topic become a discussion with Mort, his advisors, Marty, and some CJF leadership. I further suggested that perhaps this could be discussed at the meeting CIJE was seeking with its partners, CJF, JESNA, and JCCA. Marty replied that that meeting had been scratched, and I responded that I thought there was an attempt to reactivate it. Marty agreed that might then be a good forum for such a discussion.

Please let me know if there's anything further you wish me to do with this matter.

Warm regards.

FAX TRANSMITTAL

		DATE 5/3/93	TIME
PLEASE RUSH TO	NAME Seymour Fox Annette Hochstein	COMPANY	FAX NO. 011-972-2-619-951
FROM	NAME Steve Hoffman	**JEWISH COMMUNITY FEDERATION** 1750 Euclid Avenue Cleveland, Ohio 44115 Phone: 216-566-9200 Fax #: 216-566-9084	

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MESSAGE

The Atlanta Federation has asked for a more detailed agenda for next week's meeting. The present outline given to them by Marshall Levin is too sketchy.

Can you give me a more detailed agenda to share with them in terms of objectives expected, outcomes, etc.?

Warm regards.

SHH:gc
B3:14A

STEVE HOFFMAN AGENDA
----------------------28.3.93

1. DENOMINATIONS AND THE SEMINAR IN MAY - THEIR
    PARTICIPATION

2. DIRECTOR FOR CIJE

3. ARRANGE TELECON WITH HIM AND HANK ZUCKER

4. SHULAMIT ELSTER

5. CLEVELAND

6. RAY LEVI

7. JACK UKLESE FAX (SEE ATTACHED)

8. HIS FAX (SEE ATTACHED)

THE JEWISH COMMUNITY FEDERATION OF CLEVELAND
1750 EUCLID AVENUE · CLEVELAND, OHIO 44115 · PHONE (216) 566-9200 · FAX # (216) 861-1230

March 18, 1993

M E M O R A N D U M

TO: Seymour Fox
      Annette Hochstein

FROM: Stephen H. Hoffman

As I have discussed with you from time to time, Cleveland is
moving ahead with the second four-year phase of our
Commission on Jewish Continuity. In the last four years we
spent just over $4 million, and we anticipate that growing
to $8 million over the next four years. In short -- fairly
significant dollars.

Needless to say, we've learned a lot in our first four years
and our learning was greatly enhanced by Dan Pekarsky's
involvement, due to your encouragement. As you know, we had
each program conduct self-evaluations, which were reviewed
by Jon Woocher, Adam Gamoran and Susan Shevitz. And, we had
Jim Meier from Ukeles & Associates do an outside review
(copy enclosed). While we learned from all this, we believe
we should do better evaluation work going forward. Funds
have been budgeted for this purpose.

Would it not make sense to ask Ellen Goldring to work
Cleveland into the CIJE evaluation program just as they are
looking at the lead communities? We'd have to identify
another resident researcher, etc.

Another subject . . . I know you have shared with Alan
Hoffman our personnel needs. Let me place them in front of
you again. We are searching for at least four people:

    1.   Leader of the Cleveland Fellows project at the
         College (to replace Dan Pekarsky).

    2.   A director of the Retreat Institute at the Jewish
         Community Center.

    3.   An assistant director for the Retreat Institute.

Seymour Fox   -2-   March 19, 1993
Annette Hochstein

4.   A senior planner/thinker for the new COJC-Bureau of
     Jewish Education entity that Mark Gurvis will lead
     -- someone capable of analyzing Cleveland's
     educational needs on a macro-level and working one
     on one with each school on a micro-level.

Your suggestions for people to consider among the Jerusalem
Fellows, senior educators, or wherever, are highly required.

Finally, I would like, more formally, to have your input on
our work in Cleveland. We've chatted over the years and
had extended discussions during your visits in town, but I
think we would benefit from a more rigorous involvement.
We're contemplating a major redesign of the Cleveland
Fellows training component. We should be re-examining our
Project Curriculum Renewal in the next year or two. Our
major in-service work should be evaluated, etc. To whom
else can I turn but to the people I respect?

I know this is a lot to lay on you, but I need your guidance
for the pre-lead community, community!

Warm regards.

SHH:gc
B3:03B

Enc.

cc: Mark Gurvis

FAX TRANSMITTAL

	DATE 2/8/93	TIME 10:30 a.m.

	NAME	COMPANY	FAX NO.
PLEASE RUSH TO	Annette Hochstein		011-972-2-619-951

	NAME	JEWISH COMMUNITY FEDERATION
FROM	Steve Hoffman	1750 Euclid Avenue Cleveland, Ohio 44115 Phone: 216-566-9200 Fax #: 216-566-9084

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MESSAGE

What are your recommendations as to how we should respond?

February 4, 1993

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

Dear Steve:

Good seeing you yesterday. Our discussion was enlightening
and gave me some much needed insight into some of the reasons
for the dearth of progress.

Notwithstanding the staffing and funding issues which Atlanta
must address, all of us are still struggling to identify how
to move forward. CIJE staff may be clear about Lead
Community Project goals, and have a plan, but it's a great
deal more nebulous to us in the communities.

While Atlanta intends to move forward with Jewish educational
planning, and would have done so whether selected by CIJE or
not, our involvement makes it possible to be much more
effective than we would have been on our own. Before we can
focus on content, however, we need to understand CIJE's plan.

Annette mentioned that CIJE has a very rich plan. For me,
such a plan would articulate the broad areas in which CIJE
will work--building the profession, mobilizing the community,
developing a research capability, disseminating Best
Practices material, connecting lead communities with
potential funders, involving other major organizations, etc.
-- and, for each area, would include goals and/or
objectives, activities designed to meet them, and a
timetable.

Lead community planning should occur within the context of a
CIJE plan. I understand the importance of content and
linking it to planning but, from my perspective, CIJE has
skipped the development of its own implementation plan.
Instead of creating its own written plan, CIJE is focusing on
what the communities should be doing.
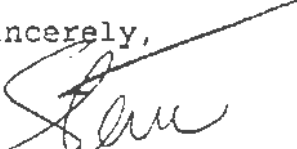
In section H of "Lead Communities at Work," there is a list of six community tasks which are to be included during the first year. CIJE staff must understand that success depends upon mutual interests. CIJE can't gloss over our request to understand its implementation plan and proceed to tell us our responsibilities.

Annette will send a draft agenda for the next meeting, which should have three purposes: (1) to work together to flesh out an implementation plan for CIJE, (2) to identify how local planning in each lead community will mesh with the CIJE plan, and (3) to develop a process for implementing an initiative in each community as soon as possible, whether a "best practice," a program for profesionals, or something else.

The meeting should have relatively few participants, be structured, and have a facilitator. Just as with our own meetings at home, the quality of the preparation will determine the outcome.

Hope this is helpful.

Sincerely,

Steven E. Gelfand
Associate Executive Director

p.s.   We're available for a meeting on March 10, 11, 12, 16, 17, 23, 24. Please confirm as soon as possible. Thanks.

UKELES ASSOCIATES INC.

611 Broadway, suite 505 · New York, NY 10012

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

FACSIMILE TRANSMITTAL SHEET
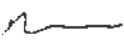
	DATE: 4-15-93
TO: Annette Hochstein	FROM: Jack Ukeles
COMPANY:	PAGES (including cover): 5
FAX #:	FAX #: (212) 260-8760

MESSAGE:

If there is a problem with this transmission

please call _____ at (212) 260-8758.

MEMORANDUM

To: Annette Hochstein
               Ginny Levi

From: Jim Meier

Date: February 4, 1993

Re: Attached draft of Planning Guide

Hope you had easy return flights.

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

TABLE OF CONTENTS

LEAD COMMUNITIES PLANNING GUIDE

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

Professor Isadore Twersky
A Time to Act, p. 19

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

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

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

Atlanta, Baltimore, and Milwaukee have taken on an exciting challenge and an awesome responsibility: to dramatically improve Jewish education throughout their communities, and in the process, to serve as beacons in this endeavor for others in North America. These "lead communities" will provide a leadership function for others in communities throughout the continent. Their purpose is to serve as laboratories in which to discover the educational practices and policies that work best. They will function as the testing places for "best practices" -- exemplary or excellent programs -- in all fields of Jewish education.

INTRODUCTION

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

The purposes of these guidelines are to:

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

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

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

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

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

I. FIRST STEPS

> *"Fundamental to the success of the lead communities will be the commitment of the community and its key stakeholders to this endeavor. The community must be willing to set high educational standards, raise additional funding for education, involve all or most of its educational institutions in the program, and thereby become a model for the rest of the country. Because the initiative will come from the community itself, this will be a "bottom-up" rather than a "top-down" effort."*

<div align="right">

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

</div>

Rationale

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

Major Activity Areas

There are two major areas for attention:

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

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

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

Tasks

1. Identify and recruit key leadership, including:

   ■ Chair

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

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

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

Box 1: Concentric Circles of Leadership

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

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

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

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

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

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

Box 2: Examples of Background Materials

- A Time To Act

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

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

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

- CIJE project descriptions

    o "Best Practices"

    o Monitoring, Evaluation and Feedback

    o Goals Project

---

3. Convene Commission

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

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

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

Box 3: Illustrative Planning Framework

Phase	Deliverable	Commission Meeting Subject

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

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

4. Devise task force structure

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

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

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

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

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

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

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

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

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

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

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

II. SELF-STUDY

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

<div align="right">

A Time to Act, p. 31

</div>

Rationale

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

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

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

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

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

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

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

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

---

1. Profile

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

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

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

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

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

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

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

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

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

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

■ Qualifications, skills, expertise and background

■ Salary and benefit levels

Box 4: Elements of an Institution or Program Profile

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

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

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

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

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

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

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

2. Needs Analysis

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

- Educator's survey

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

Educators' Survey

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

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

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

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

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

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

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

- Involve educators from formal and informal settings

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

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

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

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

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

- Affiliation

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

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

- Work history

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

- Secular education positions

- Salary history, in Jewish education

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

    ○ Areas of knowledge
    ○ Skills
    ○ Special talents

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

Market Analysis

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

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

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

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

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

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

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

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

┌───┐
│ **Box 6: Targeting**   │
│   │
│   Several criteria can be applied in making decisions about what information or which │
│ groups to target in the needs analysis.   │
│   │
│ • **Present knowledge**: How much is already known about the topic or the needs of the │
│ group? Has the issue or group previously been studied? Are there significant open │
│ questions about what the needs are or how they should be addressed?   │
│   │
│ • **Priority**: How high a priority is the topic or sub-group with respect to Jewish │
│ education? Are the needs of this group for Jewish education a major issue or concern in │
│ the community?   │
│   │
│ • **Scope**: Is the scope of its impact (for example because of size or centrality) likely to │
│ be large?   │
│   │
│ • **Feasibility**: What resources of time, effort, money are needed to answer the open │
│ questions? For example, does available personnel have the expertise to design and carry │
│ out the study? Are data collection instruments available in the community or elsewhere │
│ that can be adapted?   │
└───┘

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

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

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

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

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

Box 7: Selecting the Measure of Need

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

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

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

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

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

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

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

■ Utilization of space

■ Levels of funding

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

<u>Measures of Quality</u>

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

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

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

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

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

Box 8: Illustrative Measures of Quality and Effectiveness

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

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

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

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

■ Communication and collaboration between program professionals and rabbis

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

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

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

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

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

1. Design Needs Analysis

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

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

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

2. Collect Information: on present participation levels

3. Estimate Community Need/Demand

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

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

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

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

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

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

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

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

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

3. Follow-on Agenda

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

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

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

III. CRITICAL ISSUES

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

<u>A Time to Act,</u> p. 25-26

Rationale

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

Deliverables:

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

Benchmarks and Methods

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

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│ Box 10:  Sample Assumptions                                             ║│
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1. Shortages in qualified Jewish education personnel will not be satisfactorily overcome until a series of systemic problems in the profession are addressed (e.g., salaries, training, career opportunities, empowerment in decision making) -- not just one element.

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

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

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

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

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

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

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

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

Box 11: Classification of Issues

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

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

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

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

IV. MISSION OR VISION STATEMENT

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

A Time to Act, P. 27

Rationale

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

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

Deliverable

A concise mission statement.

Benchmarks and Methods

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

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

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

V. SETTING STRATEGIES AND PRIORITIES

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

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A Time to Act, p. 28

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Rationale

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

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

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

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

Deliverables

- List of policy recommendations for the improvement of community mobilization

- Recommended priority rank and desirable sequence for each recommendation

- List of criteria used to select and rank policy recommendations

---

Benchmarks and Methods

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

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

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

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

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

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

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

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

Box 13: Sample Criteria for Selecting Strategies and Priorities

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

- Broadens lay leader involvement and support of Jewish education.

- Maximizes effective utilization of resources (minimize duplication).

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

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

VI. DESIGNING PROGRAMS/PILOT PROJECTS

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

A Time to Act, p. 26

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

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

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

The "Best Practices" project is now developing a method by which lead community planners and educators can learn from the best practices it has document and begin to introduce adaptations of those ideas into their own communities. This can occur through a wide range of activities including: site visits by lead community planners to observe best practices in action; visits by best practice practitioners to lead communities; workshops with educators in lead communities, etc.

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

Pilot Projects

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

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

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

Box 15: Sample Criteria for Pilot Project Selection

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

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

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

• Promotes multi-agency programming and cooperation

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

• Can feasibly be implemented quickly

> **Box 16: Sample Ideas for Pilot Projects**
>
> Personnel
>
> • In-service training for educational leadership -- school principals and JCC program directors.
>
> • In-service training for 2 teachers and 2 informal educators from each institution.
>
> • Summer seminar in Israel for selected educators
>
>
> Community Mobilization
>
> • Leadership training program for congregational and agency board members
>
> • A series of public forums on the Lead Community idea, "Best Practices" and/or goals and visions for Jewish education

Commission Programs

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

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

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

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

Box 17: Steps in Developing Program Recommendations

- Adapt commission criteria for evaluating ideas

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

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

- Test assumptions: define questions and obtain answers

- Review with CIJE, national experts, and local users

- Detail program needs, operations and implementation

- Estimate costs

- Set priorities and phasing among program ideas

- Present priorities and justification to Commission

VII. FINANCIAL RESOURCE DEVELOPMENT

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

A Time to Act, p. 41

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

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

■ Creation or expansion of a fund for Jewish education

■ Major donors

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

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

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

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

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

2. Review strategies with CIJE

3. Match programs to funder interests

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

5. Follow-up, as appropriate.

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FACSIMILE TRANSMITTAL SHEET

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

MESSAGE:

If there is a problem with this transmission

please call _____ at (212) 260-8758.

MEMORANDUM

To: Annette Hochstein

From: Jim Meier

Date: January 29, 1993

Re: Redraft of the Planning Guidelines

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

Hope you have a good flight to the US.

TABLE OF CONTENTS

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

LEAD COMMUNITIES PLANNING GUIDE

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

Professor Isadore Twersky

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

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

Atlanta, Baltimore, and Milwaukee have taken on an exciting challenge and an awesome responsibility: to dramatically improve Jewish education throughout their communities, and in the process, to serve as beacons in the art of the possible for North American Jewry. These "lead communities" will provide a leadership function for other communities throughout the continent. Their purpose is to serve as laboratories in which to discover the educational practices and policies that work best. They will function as the testing places for "best practices" -- exemplary or excellent programs -- in all fields of Jewish education.

INTRODUCTION

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

The purposes of these guidelines are to:

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

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

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

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

I. FIRST STEPS

"Fundamental to the success of the lead communities will be the commitment of the community and its key stakeholders to this endeavor. The community must be willing to set high educational standards, raise additional funding for education, involve all or most of its educational institutions in the program, and thereby become a model for the rest of the country. Because the initiative will come from the community itself, this will be a "bottom-up" rather than a "top-down" effort."

Rationale

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

Major Activity Areas

There are two major areas for attention:

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

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

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

Tasks

1. Identify and recruit key leadership, including:

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

Box 2: Examples of Background Materials

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

- Draft of CIJE letter of agreement

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

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

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

- CIJE project descriptions

     o "Best Practices"

     o Monitoring, Evaluation and Feedback

     o Goals Project

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3. Convene Commission

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

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

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

Box 3: Illustrative Planning Framework

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

4. Devise task force structure

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

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

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

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

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

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

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

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

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

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

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

II. SELF-STUDY

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

Rationale

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

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

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

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

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

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

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

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

1. Profile

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

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

- Skills, expertise and background

- Salary levels

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

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

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

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

Box 9: Elements of an Institution or Program Profile

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

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

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

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

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

- Central agency

- Day schools

- Supplementary schools

- JCC education services

- Camps

2. Needs Analysis

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

- Educator's survey

- Market analysis: selected client/consumer groups

- Assessment of quality

Educators' Survey

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

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

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

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

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

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

- Involve formal and informal educators

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

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

Box 4: Educators' Survey: Possible Categories for Inventory (Illustrative only)

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

• Affiliation

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

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

• Work history

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

• Secular education positions

• Salary history, in Jewish education

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

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

Market Analysis

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

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

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articulated and addressed up-front:

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

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

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

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

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

Box 5: Targeting

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

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

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

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

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

<u>Measures of Need</u>: There are three conceptual ways of considering need:

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

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

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

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

Box 6: Selecting the Measure of Need

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

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

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

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

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

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

■ Data on numbers and characteristics of personnel

- Utilization of space

- Levels of funding

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

Measures of Quality

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

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

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

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

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

Box 7: Illustrative Measures of Quality and Effectiveness

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

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

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

<u>Benchmarks/Tasks</u>

1. Design Needs Analysis

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

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

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

2. Collect information: on present participation levels

3. Estimate of community need/demand

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

Box 8: Methods

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

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

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

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

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

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

3. Follow-on Agenda

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

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

III. CRITICAL ISSUES

[INSERT FROM TIME TO ACT]

Rationale

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

Deliverables:

- Explicit assumptions

- Formulation of critical issues

- Document summarizing consensus of committee on each critical issue

Benchmarks and Methods

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

Box 10: Sample Assumptions

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

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

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

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

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

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

Box 11: Classification of Issues

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

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

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

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

IV. MISSION OR VISION STATEMENT

Rationale

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

Deliverable

A one paragraph to one page Mission Statement.

Benchmarks and Methods

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

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

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

V. SETTING STRATEGIES AND PRIORITIES

Rationale

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

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

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

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

Deliverables

- List of policy recommendations for the improvement of Jewish education

- Recommended priority rank and desirable sequence for each recommendation

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

Benchmarks and Methods

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

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

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

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

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

■ Criteria that derive from the Mission Statement

■ Criteria that derive from continental experience in planning for Jewish education

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

Box 13: Sample Criteria for Selecting Strategies and Priorities

• Support professionalization of principals and teachers -- including incentives for higher levels of education.

• Encourage deeper communal involvement and support of Jewish education.

• Maximize effective utilization of resources (minimize duplication).

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

VI. DESIGNING PROGRAMS/PILOT PROJECTS

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

The recent history of Jewish education, as with many other enterprises, contains too many instances of programs being thrown at problems out of a sense of frustration or crisis. Here we hope to shift the emphasis toward the tried, proven and planned. "Best Practices," a CIJE project that is documenting successful programs throughout the continent and organizing them in a variety of categories, should be immensely helpful here. "Best Practice" programs are being classified in six groupings:

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

We envision programs being launched in two stages: first a few pilot projects to energize the project; and a subsequent series of programs reflecting the vision and priorities of the commission, which may also be phased to reflect funding flows or other factors.

Pilot Projects

A community may wish to launch a small number of pilot programs early in the process to gain visibility for its lead community project, to mobilize the community and create a sense of excitement, and to test ideas about which it has a reasonably high level of confidence of success. Programs selected as pilot should be ones which are likely to be consistent with long term directions, or likely to show reasonably dramatic results in a short period of time. Box 14 contains sample criteria for use in selecting pilot projects.

Selecting pilot projects that address high priority infrastructure needs -- namely personnel and community mobilization -- is another way of helping to ensure the viability of the effort. Sample pilot programs are listed in Box 15.

Box 14: Sample Criteria for Pilot Project Selection

- Improves professional status of teachers, principals, and informal educators

- Promises short-term success and visibility

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

- Promotes multi-agency programming and cooperation

- Maximizes parental involvement

- Strengthens congregations

Box 15: Sample Ideas for Pilot Projects

Personnel

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

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

- Summer seminar in Israel for selected educators

Community Mobilization

- Leadership training program for congregational and agency board members.

- A series of public forums on "best practices" and/or the community vision.

Commission Programs

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

Program Selection: There are several methods for eliciting and selecting program ideas, and working out program implementation details:

- ■   Request for proposal (RFP) process

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

Box 16 offers suggestions for developing program recommendations which, with some modifications, apply to each of the above selection approaches.

Box 16: Steps in Developing Program Recommendations

- Brainstorm program ideas

- Adapt commission criteria for evaluating ideas

- Compare with other communities

- Test assumptions: define questions and obtain answers

- Confer with users

- Detail program needs, operations and implementation

- Estimate costs

- Set priorities and phasing among program ideas

- Present priorities and justification to Commission

VII. FINANCIAL RESOURCE DEVELOPMENT

Develop a short-term and a long-term strategy for obtaining funding to support Commission initiatives. Obvious potential categories include:

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

- Creation or expansion of a fund for Jewish education

- Major donors

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

Naturally, primary attention will focus on obtaining resources for start-up efforts.

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

1. Package most attractive program ideas

   . Select the most engaging program ideas to showcase
   . Package or repackage programs to be most appealing

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

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

3. Match programs to funder interests

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

5. Follow-up, as appropriate.

VIII. PREPARE FIRST YEAR ACTION PLAN

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

APPENDICES

Agenda for telecon with Jack Ukeles,
Tuesday 26, 1993, 17:40

1. Planning guide

    b. Introductory statement
    c. Presentation and discussion with communities

2. Draft before Monday (Friday ?)

3. Community work book

4. Possible meeting

CIJE:LC3

TIMESHEET
Dec 1992

DATE	JBU Hours	JM Hours	Assoc Hrs	Sub-total
12/1	2.75	1	0	3.75
12/2	0.25	1	0	1.25
12/3	0	0	0	0.00
12/4	0	0	0	0.00
12/6	0	0	0	0.00
12/7	0	0	0	0.00
12/8	0	0	0	0.00
12/9	0	1	0	1.00
12/10	0	0	0	0.00
12/11	0	0	0	0.00
12/13	0	0	0	0.00
12/14	0	0.5	0	0.50
12/15	0	2.75	0	2.75
12/16	0	0.5	0	0.50
12/17	0.25	0	0	0.25
12/18	0	0	0	0.00
12/20	0	0	0	0.00
12/21	0	0.25	0	0.25
12/22	0	5.25	0	5.25
12/23	0.5	4	0	4.50
12/24	0.5	0.5	0	1.00
12/25	0	0	0	0.00
TOTAL	4.25	16.75	0.00	21.00

MEMORANDUM

To: Shulamith Elster
            Seymour Fox
            Sol Greenfield
            Annette Hochstein
            Art Rotman
            John Woocher

From: Jim Meier

Date: December 29, 1992

Re: Second Draft of Planning Guide

Enclosed is the second draft of the planning guide for Lead Communities. I would appreciate your comments by Tuesday January 5, if at all possible.

Best wishes for a happy and healthy New Year.

LEAD COMMUNITIES PLANNING GUIDE

INTRODUCTION

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

The purposes of these guidelines are to:

• establish a timeframe for planning process benchmarks so that the first stages of implementation can begin in the Fall of 1993,

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

• give some measure of uniformity to the planning process that each of the lead communities will engage in during the next months.

Each community will need to tailor these guidelines to its own circumstances. While these guidelines encompass the full scope of the planning process, we acknowledge and emphasize that given the real constraints of time and resource limitations, no community can feasibly carry out every step. Each community must strike a balance between thoroughness and readiness to take action.

As a general principle the object is to build upon the work and the research that has already been done in each community. It usually does not make sense to reinvent the wheel. On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.

I. FIRST STEPS

Rationale

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

Major Activity Areas

There are two major areas for attention:

1. Initial mobilization of lay leadership
2. Introducing the idea into the community

Building a "wall-to-wall coalition" is one central objective of the Lead Communities project. A widening net of stakeholder involvement is Jewish education is the instrument for engaging a larger portion of the Jewish community. The mobilization of project leadership is the pivotal starting point for achieving that objective.

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

Tasks

1. Identify key leadership, including:

   . Champion
   . Lay leaders and major donors
   . Educators
   . Rabbis
   . Professionals

2. Establish the oversight Commission, composed with representation that reflects the broad spectrum of the community. E.g., leadership from:

   . Federation
   . Synagogues
   . Communal agencies and organizations
   . Schools and programs

2

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Box 1: Concentric Circles of Leadership

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

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

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

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

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

As a rule, broad representation of diverse constituencies is desirable at every level of organization. However, the top levels of leadership generally should contain a higher percentage of lay representation, while larger numbers of professionals, stakeholders, and agency staff are desirable on the task forces and ad hoc groups.

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

Box 2:   Examples of Background Materials

• <u>A Time To Act</u>

• Draft of CIJE letter of agreement

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

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

• CIJE project descriptions

   . "Best Practices"

   . Monitoring, Evaluation and Feedback

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

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

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

4

Box 3: Illustrative Planning Framework

Phase	Deliverable	Committee Meeting Subject
1. Start-up	(1) • Form committee • Detailed workplan • Agree on mandate (2) • Form committees	1a. Major issues in Jewish Education 1b. Review of workplan 1c. Develop "charge" to committees
2. Self-study (Needs Analysis and Profile)	• Design scheme • Profile of Jewish education; strengths and weaknesses • Report on findings	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	• Formulate issues	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	• Draft community mission statement	4. Approve mission/vision statement(s)
5. Strategies and Priorities for Action	• List of recommendations for each major client group with priority rankings and priority sequencing	5. Recommendations on priorities
6. Programs	• Draft guidelines • Define program priority areas and new initiatives • Issue call for program proposals	6. Define program priorities
7. Financial Resource Development	• Fundraising plan (e.g., potential donors, strategies, targets, timetable) • Draft budget with resource objectives	7. Approve and agree on assignments for carrying out plan. 8a. Set resource objectives ($)
8. First year action plan	• Compile summaries of program options • Prepare first year implementation plan	8b. Select programs for next year 8c. Approve overall implementation plan

5

3. Devise task force structure

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

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

- Population groups, e.g.:
    - 1 - 5: early childhood
    - 6 - 13: elementary school age
    - 14 - 18: high school/post bar/bat-mitzvah

- Delivery system, e.g.:
    - Day schools
    - Supplementary schools
    - Informal programs

- Functional, the classic "Board of Directors" model, e.g.:
    - Programs
        - Pilot projects
        - Best practices
    - Fundraising
    - Coalition building and marketing/networking
    - Monitoring and evaluation
    - Educator's survey
    - Five year planning

- Programmatic, e.g.:
    - Personnel
    - Israel experience
    - Synagogue programs

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

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

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

- Priorities: Do the topics represent articulated, or likely, priority areas of the community or the commission.

6

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

II. SELF-STUDY

Rationale

Good information is the foundation of good decision making. In real life, however, we are often required to take action based on incomplete or imperfect knowledge. In planning a community-wide initiative on Jewish education, this is especially true. The self-study -- learning more about the needs, resources, dynamics, and aspirations of the community -- therefore should be an iterative process.

The first phase is oriented toward the first year action plan, what can be learned that will inform decisions and plans for the 1993-94 year. A by-product of the first phase self study is a clearer definition of what is not known that impacts on the critical choices. Delineation of the gaps in information will help frame the second phase of the self-study, a more thorough investigation which will then proceed over the next year and a half to two years.

The basic purpose of the self-study is to provide a baseline for Commission deliberations and establishment of program priorities. It should provide a common foundation of information for Commission members, level the playing field about assumptions (without which participants in the debate are driven to present opinions and perceptions with the force of fact), enlighten even the most knowledgeable insider, and identify the critical issues and choices the Commission needs to address. It also:

- Identifies unserved and underserved needs for Jewish education, as perceived by groups within the community.

- Helps identify critical issues, or choices that will need to be addressed.

- Provides a common base of information to enlighten decisions on critical issues.

- Clarify areas of agreement in moving toward establishing a standard of achievement that is acceptable within the community.

Thinking about programs and priorities later in the process should be based on the best available information on educator needs and potential users of the programs in Jewish education.

8

Elements of Self-Study

A self study of Jewish education in a lead community will have several elements:

(1) A **needs analysis**

(2) A **profile** of the Jewish education enterprise in the community, including information on (see box 6):

- Student participation
- Personnel characteristics
- Program resources
- Financial resources

Needs Analysis

A needs analysis identifies unserved and underserved needs for Jewish education, as perceived by groups within the community.

Educators' Survey: The critical importance of personnel in Jewish education dictates that an educators' survey be an early and major component of the needs analysis. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 4 contains ideas for areas to cover in a survey of Jewish education personnel.

The object from the beginning should be the development of an ongoing database about personnel. Given the scope of desired information on the human Jewish education infrastructure, the educator's survey will surely become increasingly sophisticated in subsequent years.

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

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

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

- Immediate vs. future round data: Consider ease of availability together with the urgency of need in establishing information sequencing. (See also Box 5, on "Targeting.")

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

- Involve educators.

- Select staff or consultants: In selecting staff, or contracting with a consultant, thoroughly review expectations and workplans.

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

Box 4: Educators' Survey: Suggested Categories for Inventory

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

- Affiliation preference

- Formal education background (e.g., degrees, Jewish and secular licensure, progress toward National Board licensure)

- In-service staff development (particularly, courses and workshops taken in the community)

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

- Secular education positions

- Salary history, in Jewish education

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

    . Areas of knowledge
    . Skills
    . Special talents

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

Client Groups: With respect to other potential client groups, two important issues should be articulated and addressed up-front:

1. Which sub-groups should be studied?

2. What is the appropriate definition of need?

Targeting: While it would be nice, in theory, to understand the complete quilt of needs for Jewish education in the community, in practice this is not realistic in the time available for taking action. The first step, therefore is to select the key groups, in addition to Jewish education professions, to be the focus of research during the first round.

At a minimum, the needs analysis should address the following categories unless they previously have been studied.

- Early childhood

- Ages 5-13

- Post Bar/Bat Mitzvah

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

Box 5: Targeting

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

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

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

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

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

     a. "Market:" Demand by a defined set of people.

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

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

In designing the needs analysis, you must decide which measure or measures will be most useful for each subgroup. The criteria for targeting will be helpful in narrowing the measures as well. See also Box 6.

Box 6: Selecting the Measure of Need

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

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

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

• It is a major undertaking, and perhaps impossible at this time, to define objective standards of how much Jewish education one should have. Similar individuals will vary dramatically in their self-perception of their own need for Jewish education.

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

12

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

- data on the numbers of programs, by type, their capacities and actual enrollments

- data on numbers and characteristics of personnel

- utilization of space

- levels of funding, and

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

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

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

If enrollment or attendance is low, or dropoff at age 13 is high, is it because the prospective students are not out there or because the programs are poorly designed or run? Information on the quality and effectiveness of programs is important for identifying strengths and weaknesses of the existing system, for developing strategies for improvement, and ultimately for establishing a baseline against which the impact of future efforts can be measured.

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

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

13

Box 7:   Illustrative Measures of Quality and Effectiveness

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

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

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

Benchmarks/Tasks

1. Design Needs Analysis

    a. Focus: Select the primary groups to study.

    b. Measures: Decide on the perspective for measuring the need of each group.

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

2. Collect information: on present participation levels. (See Box 8.)

3. Estimate of community need/demand.

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

14

Box 8: Methods

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

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

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

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

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

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

Profile

1. Develop profile of present Jewish education personnel by drawing on the data from the educator's survey.

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

   • Skills, expertise and background

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

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

3. Analyze program capacities and participation rates (formal and informal programs, by institution/program)

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

Box 9:   Elements of an Institution or Program Profile

• Students:
  . Enrollment and graduation trends
  . Age range

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

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

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

Deliverables

The end product of the needs analysis and profile is a report that describes for each targeted group:

a. The size of the <u>total potential</u> market.
b. The size of the likely market, <u>"ripest"</u> for Jewish education.
c. The <u>characteristics</u> of the parts of that market ripest for Jewish education.
d. Profile of resources including strengths, weaknesses and major gaps
e. The factors influencing participation.
f. The most appropriate methods for meeting the needs of this group.
g. Who should provide the Jewish education.

III. CRITICAL ISSUES

Rationale

In charting future directions, any community faces a number of important policy choices: i.e., critical issues. Early discussions of the planning committee are the first step in identifying the critical issues. The needs assessment and the in depth analysis of program operations through the profile will provide the information needed to sort out and clarify the fundamental decisions.

Deliverables:

- Explicit assumptions

- Formulation of critical issues

- Document summarizing consensus of committee on each critical issue

Benchmarks and Methods

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

Box 10: Sample Assumptions
1.   The primary instrument of supplementary education is the school within a congregation.
2.   The delivery system needs to offer an opportunity for balance (creative tension) between community-wide interests and the interests and perspectives of the religious movements (Reform, Conservative, Reconstructionist and Orthodox).
3.   Some type of central entity or entities will be needed to support Jewish education in the community.

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

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

Box 11:   Classification of Issues

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

2.   Policy issues -- i.e. choices relating to the broad policies relevant to carrying out the community's mission. Some of these choices relate to professional development (e.g. the balance between in-service and pre-service training for pre-school teachers); recruitment (e.g. the balance between new entrants into the field, continuing education, and re-training people from other fields).

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

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

19

IV. MISSION OR VISION STATEMENT

Rationale

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

Deliverable

A one paragraph to one page Mission Statement

Benchmarks and Methods

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

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

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

20

V. SETTING STRATEGIES AND PRIORITIES

Rationale

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

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

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

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

Deliverables

• List of policy recommendations for the improvement of Jewish education

• Recommended priority rank and desirable sequence for each recommendation

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

Benchmarks and Methods

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

<u>Options</u> are the items that are ranked in priority-setting. In other words, an "option" is something that is a potential recipient or user of a commission resource. An <u>options</u> structure is an organized, systematic listing of all the possible options. The decision as to what to list as an

option is an absolutely crucial one; for once that decision is made, it defines what gets ranked in priority-setting.

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

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

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

- Criteria that derive from the Mission Statement

- Criteria that derive from continental experience in planning for Jewish education

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

Box 13: Sample Criteria for Selecting Strategies and Priorities

- Support professionalization of principals and teachers -- including incentives for higher levels of education.

- Encourage deeper communal involvement and support of Jewish education.

- Maximize effective utilization of resources (minimize duplication).

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

VI. DESIGNING PROGRAMS/PILOT PROJECTS

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

The recent history of Jewish education, as with many other enterprises, contains too many instances of programs being thrown at problems out of a sense of frustration or crisis. Here we hope to shift the emphasis toward the tried, proven and planned. "Best Practices," a CIJE project that is documenting successful programs throughout the continent and organizing them in a variety of categories, should be immensely helpful here. "Best Practice" programs are being classified in six groupings:

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

We envision programs being launched in two stages: first a few pilot projects to energize the project; and a subsequent series of programs reflecting the vision and priorities of the commission, which may also be phased to reflect funding flows or other factors.

Pilot Projects

A community may wish to launch a small number of pilot programs early in the process to gain visibility for its lead community project, to mobilize the community and create a sense of excitement, and to test ideas about which it has a reasonably high level of confidence of success. Programs selected as pilot should be ones which are likely to be consistent with long term directions, or likely to show reasonably dramatic results in a short period of time. Box 14 contains sample criteria for use in selecting pilot projects.

Selecting pilot projects that address high priority infrastructure needs -- namely personnel and community mobilization -- is another way of helping to ensure the viability of the effort. Sample pilot programs are listed in Box 15.

Box 14: Sample Criteria for Pilot Project Selection

- Improves professional status of teachers, principals, and informal educators

- Promises short-term success and visibility

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

- Promotes multi-agency programming and cooperation

- Maximizes parental involvement

- Strengthens congregations

Box 15: Sample Ideas for Pilot Projects

Personnel

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

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

- Summer seminar in Israel for selected educators

Community Mobilization

- Leadership training program for congregational and agency board members.

- A series of public forums on "best practices" and/or the community vision.

Commission Programs

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

Program Selection: There are several methods for eliciting and selecting program ideas, and working out program implementation details:

- Request for proposal (RFP) process
- Delegate responsibility for specific recommendations to agencies
- Empower task forces as part of commission deliberations.

Box 16 offers suggestions for developing program recommendations which, with some modifications, apply to each of the above selection approaches.

Box 16: Steps in Developing Program Recommendations
•   Brainstorm program ideas
•   Adapt commission criteria for evaluating ideas
•   Compare with other communities
•   Test assumptions: define questions and obtain answers
•   Confer with users
•   Detail program needs, operations and implementation
•   Estimate costs
•   Set priorities and phasing among program ideas
•   Present priorities and justification to Commission

VII. FINANCIAL RESOURCE DEVELOPMENT

Develop a short-term and a long-term strategy for obtaining funding to support Commission initiatives. Obvious potential categories include:

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

- Creation or expansion of a fund for Jewish education

- Major donors

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

Naturally, primary attention will focus on obtaining resources for start-up efforts.

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

1. Package most attractive program ideas

    . Select the most engaging program ideas to showcase
    . Package or repackage programs to be most appealing

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

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

3. Match programs to funder interests

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

5. Follow-up, as appropriate.

VIII. PREPARE FIRST YEAR ACTION PLAN

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

CIJE:LC3 TIMESHEET Dec 1992				
DATE	JBU Hours	JM Hours	Assoc Hrs	Sub-total
12/1	2.75	1	0	3.75
12/2	0.25	1	0	1.25
12/3	0	0	0	0.00
12/4	0	0	0	0.00
12/6	0	0	0	0.00
12/7	0	0	0	0.00
12/8	0	0	0	0.00
12/9	0	1	0	1.00
12/10	0	0	0	0.00
12/11	0	0	0	0.00
12/13	0	0	0	0.00
12/14	0	0.5	0	0.50
12/15	0	2.75	0	2.75
12/16	0	0.5	0	0.50
12/17	0.25	0	0	0.25
12/18	0	0	0	0.00
TOTAL	3.25	6.75	0.00	10.00

UKELES ASSOCIATES, INC.
1992 TIMESHEETS

| | HOURS OF | | | |
WEEK OF	JACK UKELES	JIM MEIER	ASSOCIATES	TOTAL
Aug. 25-28	5.00	0.0	0.0	5.00
Sept. 8-11	5.50	0.25	0.0	5.75
Sept. 13-18	5.25	2.75	0.0	8.00
Sept. 20-25	16.50	5.00	0.0	21.50
Sept. 27-Oct. 2	9.50	1.00	0.0	10.50
Oct. 4-11	7.00	4.00	0.0	11.00
Oct. 12-18	3.75	3.00	0.0	6.75
Oct. 19-25	11.00	7.75	0.0	18.75
Oct. 26-31	4.50	14.75	0.0	19.25
Nov. 1-6	9.00	16.50	0.0	25.50
Nov. 8-13	10.00	6.50	0.0	16.50
Nov. 15-20	7.25	10.50	0.0	17.75
Nov. 22-27	0.0	11.00	0.0	11.00
Nov. 29-30	0.0	0.50	0.0	0.50
Dec. 1-5	3.00	2.00	0.0	5.00
Dec. 6-11	0.0	1.00	0.0	1.00
Dec. 13-18	0.25	3.75	0.0	4.00
AVERAGE TOTAL HOURS PER MONTH:			45.69	

Mr. Arthur Rotman   December 10, 1992

Annette Hochstein

Dear Art,

RE: Letter of Understanding

I am responding to the draft of the letters of understanding for
Atlanta, Baltimore, and Milwaukee as forwarded to me by Jack on
the 2nd of December -- these differ from the earlier versions I
had.

As discussed at our meeting of November 23rd with MLM, theletters
do not represent the joint understanding that would result from a
mutually agreed design of the project. Rather, they represent the
communities' understanding of the project at this time (see in
particular the preambles to the letter referring to the CIJE as
aassisting them in their current plans).

While it would perhaps be preferrable to go to work without this
written agreement, it may not be possible to do so. Therefore, it
was decided to include a specific clause limiting the agreement
to one year. This is in order to allow us to negotiate the "real"
agreement during the current year as the elements of the
projects, the resources required and the contributions of the
CIJE and of the community become specific and clear.

The current letter is also problematic on the following particu-
lars:

1.   The total amount of money a community will commit;
2.   The need to hire special staff for the project; and
3.   The definition of the current year as a planning year --
while both parties would want it also to be an action year (e.g.,
pilot projects).

I hope these notes are useful towards your meetings in the communities -- any progress from the current version would be great. You will certainly find out whether and how it is possible to progress from the current version. Do we want to consult further with MLM on this at our forthcoming meeting?

Best regards,

416

UKELES ASSOCIATES INC.

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

FACSIMILE TRANSMITTAL SHEET

	DATE: 12/2/92
TO: Annette Hochstein	FROM: Jack Ukeles
COMPANY: Inter- Continental	PAGES (including cover):
FAX #: (212) 644-0079	FAX #: (212) 260-8760

MESSAGE:

MEMORANDUM

To: Art Rotman
From: Jack Ukeles
Date: 12/1/92
Re: Draft Letter of Understanding
cc: Annette Hochstein
==

I enclose drafts of three Letters of Understanding. These drafts reflect the changes suggested by Milwaukee and Baltimore and a conversation with Steve Gelfand in Atlanta.

I have also made some changes reflecting the changing calendar. All new material is in italics.

I changed the format slightly: instead of a Dear Mr. .... , it is set up as a letter without a salutation; just two equal co-signers. I think that this gives a better "partnership" tone.

Please note the following unresolved issues:

1.   The language about the local financial contribution in the case of Baltimore reflects the language proposed by them. It is very close to what we had originally -- they added a "commit our best efforts to..."; and included non-local as well as local resources in the 40% increment that they will try to achieve. I used the same language for Atlanta. The language Milwaukee proposed is considerably softer. It is not clear that this difference would fly in Atlanta or Baltimore. Therefore I included "Baltimore-type language in the Milwaukee draft, with a "Milwaukee-type" qualifier. I think it will be a tough sell in Milwaukee.

2.   The original draft committed CIJE resources for consultation using a roster of experts. This followed from a number of discussions in your office and earlier decisions reflected in the Guidelines sent out to Lead community applicants. If CIJE is now backing away from this commitment, this needs to be explained to the communities. I have deleted the sentence about a roster of experts. This is not a change which will be missed by the local staffs.

If CIJE is now prepared to provide resources to be used for either consultation or staffing (as per the communities request at the Workshop), than this paragraph needs to be amended to reflect CIJE support for staff or consultants. (see page 2). In which case, I think we will have no problem with the change.

3.   Atlanta objected to the specifity of the staffing requirement. Upon re-reading, I didn't think it was so terrible. Maybe they can suggest language to soften.

4.   Atlanta expressed concern about the lack of parity in language: "There is specific language regarding expectations of lead communities, but only general language regarding expectations of CIJE. More consistancy of language is preferred." I have not addressed their concern.

▶ UKELES ASSOCIATES INC.

DRAFT

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

December 2, 1992

LETTER OF UNDERSTANDING

The Jewish community of Baltimore and the Council for Initiatives in Jewish Education (CIJE) have agreed to participate in a joint local-continental collaboration for excellence in Jewish education, called the Lead Communities Project.

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

The lead community is expected "to function as a local laboratory for Jewish education; to determine the educational practices and policies that work best; to redesign and improve Jewish education through a wide array of intensive programs; to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, with a high level of community support and with the necessary funding."[1, 2]

The Jewish community of Baltimore has established a Commission on Jewish Education of THE ASSOCIATED. The community views the Lead Communities Project as an opportunity to *break new ground in our strategic planning process for Jewish education. At a time when we are beginning to shape our consensus document, we feel that CIJE can provide the critical assistance our community needs, both in terms of professional expertise and financial resources, to move its educational agenda forward. At the same time, we believe Baltimore can serve as a model of progress and performance in Jewish education for other North American Jewish communities.*

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

This letter *covers the period to* August 31, 1995.

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

---

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

[2] See also Lead Communities: Program Guidelines (January, 1992) pp. 7-11.

During 1992-93, the Jewish community of Baltimore with the advice and assistance of CIJE, will prepare a five year plan for improving Jewish education. The plan will include: a needs assessment, mission or vision statement(s), program priorities, and a strategy for financial and human resource development. The plan will build on the work of the Commission on Jewish Education of THE ASSOCIATED and incorporate appropriate elements of work already completed.

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

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

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

In support of these efforts, CIJE agrees to:

- Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education; Early Childhood Education; JCC programs; Israel Experience; Day School; Campus Programs; Camping; and Adult Education. Information on all areas will be made available between *December* 1992 and *the summer of* 1993. The lead community will consider adapting and introducing these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE.

- Provide technical assistance in planning and educational development.

- Work to focus continental resources for Jewish education on the lead communities, specifically, the CIJE will introduce potential funders to the community -- including continental foundations interested in specific project areas.

- Negotiate with foundations, organi... ...d providers of programs -- training institutions, JCCA and JESNA -- to ... the nature of their involvement and their contribution to Lead Communities.

- Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.

- Convene lead community leadership for periodic meetings on common concerns.

The Lead Community agrees to:

- Establish a Lead Community Committee to direct the project. The Committee will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by *LeRoy Hoffberger*.

- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g., parents and students), educators, board members and Rabbis.

- Appoint a Lead Communities Planning Director to staff the Lead Communities Committee and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g. the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.

- Prepare a five-year plan, and annual action programs (as described above).

- Appoint a Lead Communities Director to direct the Action Program for 1993-94 onward.

- Integrate the findings of the Best Practices Program appropriate to the Lead Community (as discussed above).

- Identify and begin one or more experimental programs within the first year.

- *Address the building of* the profession of Jewish education, and thereby address the **shortage of qualified personnel.**

- **Mobilize community support to the cause of Jewish education.**

- Commit its best efforts to significantly expand the communal resources committed to Jewish education. Based on one community's experience in implementing the recommendations of its Commission on Jewish continuity, "significant expansion" should result in *a target of* at least a 40% increase in communal resources for Jewish education by the third year action program. *The definition of communal resources endorsed and underscored here includes the total dollars from which funds would be allocated,* including regular allocations, local and non-local foundation grants, endowment funds *raised through its Fund for Jewish Education,* and other sources of funds.

- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.

■   Work with CIJE to disseminate the results of their experience to other communities.

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

CIJE   Federation

By: _____   By: _____

Title: Title·
Date: _____   Date: _____

- DRAFT

COUNCIL FOR INITIATIVES
IN JEWISH EDUCATION

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

December 2, 1992

LETTER OF UNDERSTANDING

The Jewish community of Atlanta and the Council for Initiatives in Jewish Education (CIJE) have agreed to participate in a joint local-continental collaboration for excellence in Jewish education, called the Lead Communities Project.

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

The lead community is expected "to function as a local laboratory for Jewish education; to determine the educational practices and policies that work best; to redesign and improve Jewish education through a wide array of intensive programs; to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, with a high level of community support and with the necessary funding."[1, 2]

The Jewish community of Atlanta has established a Council for Jewish Continuity. The community views the Lead Communities Project as an opportunity to *increase significantly the quantity and quality of Jewish education services locally, as well as to act as a model for other Jewish communities in North America of how Jewish education can be improved in order to have a measurable effect on Jewish continuity.*

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

This letter *covers the period to* August 31, 1995.

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

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

[2] Guidelines (January, 1992) pp. 7-11.

COUNCIL FOR INITIATIVES
IN JEWISH EDUCATION

During 1992-93, the Jewish community of Atlanta with the advice and assistance of CIJE, will start to prepare a five year plan for improving Jewish education. The plan will include: a needs assessment, mission or vision statement(s), program priorities, and a strategy for financial and human resource development. The plan will build on the work of the Council for Jewish Continuity and incorporate appropriate elements of work already completed. The community, by May 1, 1993 will prepare an outline of the 5 year plan identifying the major topics to be covered, preliminary findings, *and program ideas.*

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

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

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

In support of these efforts, CIJE agrees to:

■ Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education; Early Childhood Education; JCC programs; Israel Experience; Day School; Campus Programs; Camping; and Adult Education. Information on all areas will be made available between October, 1992 and the end of May, 1993. The lead community will adapt and introduce these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE.

■ Provide technical assistance in planning and educational development, at no cost to the community.

■ Work to focus continental resources for Jewish education on the Lead Communities. Specifically, the CIJE will introduce potential funders to the community -- including continental foundations interested in specific project areas.

■ Negotiate with foundations, organizations, and providers of programs -- training institutions, JCCA and JESNA -- to define the nature of their involvement and their contribution to Lead Communities.

■ Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.

■ Convene lead community leadership for periodic meetings on common concerns.

The Lead Community agrees to:

■ Establish a Lead Community Committee to direct the project. The Committee will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by *William E. Schatten, MD.*

■ Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g., parents and students), educators, board members and Rabbis.

■ Appoint *staff to the Council for Jewish Continuity* and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g., the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.

■ Prepare a five-year plan, and annual action programs (as described above).

■ Appoint *staff* to direct the Action Program for 1993-94 onward.

■ Integrate the findings of the Best Practices Program appropriate to the Lead Community. (as discussed above).

■ Identify and begin one or more experimental programs within the first year.

■ *Address the building of* the profession of Jewish education, and thereby address the **shortage of qualified personnel.**

■ **Mobilize community support to the cause of Jewish education.**

■ Commit its best efforts to significantly expand the communal resources committed to Jewish education. Based on one community's experience in implementing the recommendations of its Commission on Jewish Continuity, "significant expansion" should result in at least a 40% increase in communal resources for Jewish education by the third year action program. *The definition of communal resources endorsed and underscored here includes the total dollars from which funds would be allocated,* including regular allocations, local and non-local foundation grants, endowment funds, and other sources of funds.

■ Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.

■   Work with CIJE to disseminate the results of their experience to other communities.

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

CIJE   Federation

By: _____   By: _____

Title: Title:
Date: _____   Date: _____

4

DRAFT

COUNCIL FOR INITIATIVES
IN JEWISH EDUCATION

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

December 2, 1992

LETTER OF UNDERSTANDING

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

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

The lead community is expected "to function as a local laboratory for Jewish education; to determine the educational practices and policies that work best; to redesign and improve Jewish education through a wide array of intensive programs; to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, with a high level of community support and with the necessary funding."[1, 2]

The Jewish community of Milwaukee has established a Jewish Education Task Force. The community views the Lead Communities Project as an opportunity to *create a vision and to frame Milwaukee's agenda for Jewish education for the 1990's, to gain a broad base of support and participation, to implement a plan that improves the overall quality of what is offered and that address service gaps, and to facilitate new initiatives in areas that address Jewish continuity concerns.*

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

This letter *covers the period to* August 31, 1995.

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

---

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

[2] See also Lead Communities: Program Guidelines (January, 1992) pp. 7-11.

During 1992-93, the Jewish community of Milwaukee with the advice and assistance of CIJE, will *start to* prepare a five year plan for improving Jewish education. The plan will include: a needs assessment, mission or vision statement(s), program priorities, and a strategy for financial and human resource development. The plan will build on the work of the *Jewish Education Task Force* and incorporate appropriate elements of work already completed. The community, by May 1, 1993 will prepare an outline of the 5 year plan identifying the major topics to be covered, preliminary findings *and program ideas.* ~~why dalet 7ud tentative conclusion?~~

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

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

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

In support of these efforts, CIJE agrees to:

■   Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education; Early Childhood Education; JCC programs; Israel Experience; Day School; Campus Programs; Camping; & Adult Education. Information on all areas will be made available between October, 1992 and *the summer of* 1993. The lead community will consider adapting and introducing these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE.

■   Provide technical assistance in planning and educational development *at no cost to the community.*

■   *Work to focus continental resources for Jewish education on the lead communities,* *specifically, the CIJE will* introduce potential funders to the community -- including continental foundations interested in specific project areas.

■   Negotiate with foundations, organizations, and providers of programs -- training institutions, JCCA and JESNA -- to define the nature of their involvement and their contribution to Lead Communities.

■   Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.

■   Convene lead community leadership for periodic meetings on common concerns.

The Lead Community agrees to:

- Establish a *Commission on Jewish Education* to direct the project. The *Commission* will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The *Commission* will be chaired by *Louise Stein and Jane Gellman.*

- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g., parents and students), educators, board members and Rabbis.

- Appoint a Lead Communities Planning *Coordinator* in 1992-1993 to staff the *Commission on Jewish Education* and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community are expected to be active participants.

- Prepare a five-year plan, and annual action programs (as described above).

- Appoint a Lead Communities *Coordinator* to direct the Action Program for 1993-94 onward. *(Which may be the same person as the Planning Coordinator.)*

- Integrate the findings of the Best Practices Program appropriate to the lead community (as discussed above).

- Identify and begin one or more experimental programs within the first year.

- *Address the* building of the profession of Jewish education, and thereby address the shortage of qualified personnel.

- Mobilize community support to the cause of Jewish education.

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

[option two - JBU]
- Commit its best efforts to significantly expand the communal resources committed to Jewish education. Based on one community's experience in implementing the recommendations of its Commission on Jewish Continuity, "significant expansion" should

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IN JEWISH EDUCATION

result in at least a 40% increase in communal resources for Jewish education by the third year action program. *The definition of communal resources endorsed and underscored here/includes the total dollars from funds would be allocated,* including regular allocations, local and non-local foundation grants, endowment funds, and other sources of funds. *Recognizing that Milwaukee already allocates a higher percentage of its annual Campaign to Jewish education than most other communities, and has one of the highest rates of per capita expenditures for Jewish education in North America, this will be a difficult objective to reach.*

here

- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.

- Work with CIJE to disseminate the results of their experience to other communities.

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

CIJE   Federation

By: _____   By: _____

Title: Title:
Date: _____   Date: _____

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9

A MODEL FOR PROGRESSIVE PLANNING IN THE JEWISH COMMUNITY

Jacob B. Ukeles

INTRODUCTION

The Need for Progressive Policy Planning

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

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

Scope of This Chapter

The purpose of this chapter is to suggest a model for policy planning[1] appropriate to the Jewish communal enterprise in North America in the 1990s.

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

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

THE ELEMENTS OF A MODEL FOR JEWISH COMMUNAL PLANNING

The Context: The Voluntary Sector

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

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

The Structure of Jewish Communal Planning

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

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

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

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

The Policy Agenda

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

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

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

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

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

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

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

TYPES OF PLANNING PROBLEMS

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

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

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

Issues

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

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

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

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

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

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

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

Programs

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

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

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

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

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

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

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

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

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

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

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

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

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

Priorities

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

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

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

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

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

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

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

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

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

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

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

Strategies

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

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

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

THE USES OF STRATEGIC PLANNING

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

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

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

A GENERAL METHOD OF JEWISH POLICY PLANNING

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Table 9.1
Criteria—Alternatives Matrix

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

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

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

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

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

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

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

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

NOTE

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

A Model for Progressive Planning   185

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

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

It™ brand fax transmittal memo 7671 | # of pages ▸ 5

ANNETTE HOCHSTEIN | From _JO ANN SCHAFFER_

Co.

Phone #

Fax #

October 21, 1992

LETTER OF UNDERSTANDING

Dear Mr. Meyer;

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

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

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

The Jewish community of Milwaukee has established a Milwaukee Association for Jewish Education. The community views the Lead Communities Project as an opportunity to

....

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

---

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

[8] See also Lead Communities: Program Guidelines (January, 1992) pp. 7-11.

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

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

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

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

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

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

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

In support of these efforts, CIJE agrees to:

■ Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education, Early Childhood Education, JCC programs; Israel Experience; Day School; Campus Programs; Camping; & Adult Education. Information on all areas will be made available between October, 1992 and the end of May, 1993. The lead community will adapt and introduce these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE.

■ Provide technical assistance in planning and educational development. The community will have access to assistance from a roster of experts provided by CIJE at no cost to the community.

---

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

- Introduce potential funders to the community -- including continental foundations interested in specific project areas.

- Negotiate with foundations, organizations, and providers of programs -- training institutions, JCCA and JESNA -- to define the nature of their involvement and their contribution to Lead Communities.

- Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.

- Convene lead community leadership for periodic meetings on common concerns.

The Lead Community agrees to:

- Establish a Lead Community Committee to direct the project. The Committee will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by ....

- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g. parents and students), educators, board members and Rabbis.

- Appoint a Lead Communities Planning Director to staff the Lead Communities Committee and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g. the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.

- Prepare a five-year plan, and annual action programs (as described above).

- Appoint a Lead Communities Director to direct the Action Program for 1993-94 onward.

- Integrate the findings of the Best Practices Program appropriate to the Lead Community. (as discussed above).

- Identify and begin one or more experimental programs within the first year.

- Build the profession of Jewish education, and thereby address the shortage of qualified personnel.

3

- ■   Mobilize community support to the cause of Jewish education.

- ■   Significantly expand the communal resources committed to Jewish education. Based on one community's experience in implementing the recommendations of its Commission on Jewish Continuity, "significant expansion" should result in at least a 40% increase in communal resources for Jewish education by the third year action program. Communal resources include regular allocations, endowment funds, local foundation grants, and other sources of local funds.

- ■   Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.

- ■   Work with CIJE to disseminate the results of their experience to other communities.

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

CIJE

Federation

By: _____

By: _____

Title:

Title:

Date: _____

Date: _____

COUNCIL FOR INITIATIVES
IN JEWISH EDUCATION

(ILLUSTRATIVE)

APPENDIX: TOPICS LIKELY TO BE ADDRESSED BY A LEAD COMMUNITIES PLAN
===

- How the community plans to approach major improvements in educational personnel (e.g., in-service education for all educators)

- What improvements are envisioned for each major setting within which Jewish education takes place: congregations and supplementary schools; JCC's, Israel experience; Day schools; and camping; higher Jewish education campuses

- How to create a more supportive climate for Jewish education

- How to approach the Jewish education of each major group in the life cycle: singles; families with young children; teens; the college years; empty nesters; older people

- How the community plans to encourage linkages (e.g., between formal and informal educational experiences)

5

UKELES ASSOCIATES INC.

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

FACSIMILE TRANSMITTAL SHEET

	DATE: 10-5-92
TO: Annette Hochstein	FROM: Jack Ukeles
COMPANY:	PAGES (including cover): 3
FAX #:	FAX #: (212) 260-8760

MESSAGE:

If there is a problem with this transmission

please call _____ at (212) 260-8758.

MEMORANDUM

To: Annette Hochstein

From: Jack Ukeles

Date: October 5, 1992

Re: Lead Communities Letter of Understanding

לשם לחיותם מלכים

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

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

1)   that the draft letter does not appropriately convey the idea that the Lead Communities Project is about systemic change, it sounds like just another commission.

2)   that the document needs to include much more of the specific content of the Lead Communities Project as envisioned in "A Time to Act" and subsequent materials.

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

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

2)   they now know what CIJE brings to the collaboration and what is expected of the communities.

3)   they want to get on with it.

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

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

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

UKELES ASSOCIATES INC.

611 Broadway, suite 505 · New York, NY 10012
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FACSIMILE TRANSMITTAL SHEET

	DATE: 10-4-92
TO: Annole Hochslein	FROM: Jim Meier
COMPANY:	PAGES (including cover): 5
FAX #:	FAX #: (212) 260-8760

MESSAGE:

If there is a problem with this transmission

please call _____ at (212) 260-8758.

MEMORANDUM

To: Arthur Rotman
             Shulamith Elster
             Annette Hochstein
             Sol Greenfield

From: Jim Meier

Date: October 5, 1992

Re: Preliminary Outline for LC Planning Manual

Attached is a draft outline for the planning manual for Lead Communities. I look forward to your comments and reactions.

[draft 10-4-92]

Lead Communities Planning Guide
Preliminary Outline of Contents

I. Analysis of needs

    A. Current community demographics:

        1. Population characteristics: cohort sizes
        2. Jewish educators, by category (e.g. day school principals, day school teachers, supplementary, early childhood ...)
        3. Other Jewish education target group sizes (e.g., lay leaders, adult education learners, communal service professionals, college-age youth, other special groups)

    B. Present program capacities and participation rates

        1. Participation rates (formal and informal programs)
        2. Program capacities (directory of resources, enrollment capacities)

          . Institutions
          . Programs

        3. Estimate of community need/demand
        4. Gaps [B3 - B2]

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

    A. Areas for assessment

        1. Institutions and programs
        2. Students (levels of attainment)
        3. Personnel development
        4. Lay involvement and leadership
        5. Information (system capabilities)
        6. Coordination and collaboration within system
        7. Uses of technology

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

III. Strategic issues (confronting and resolving critical choices)

    A. Identify strategic choices
    B. Resolve strategic choices

     C. Develop community-wide mission or vision statement(s)

IV. Establishing strategies and priorities

     A. Formulate strategies
     B. Establish priorities

          1. Population groups
          2. Programs
          3. Enabling functions/resources

V. Designing programs (to address priorities)

     A. Initiate program ideas or strategies/preliminary proposals

          1. Leadership (lay and professional)
          2. Institutions and human resources (including collaboration)
          3. Programs (including Israel trips, personnel)
          4. Planning and evaluation
          5. Financial resources

     B. Select program priorities/phasing

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

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

VII. Next Steps: Implementing the plan

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

APPENDICES

General format for each section

Section heading

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

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

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

Methods: "How" to do the task.

Comment Box

For elaborative comments, suggestive hints, or enhancement options.

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

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

Examples:

MEMORANDUM

TO: SF, SW, CAROLINE

FROM: AH

DATE: APRIL 15, 1993

RE: MARSHALL LEVIN AT APRIL SEMINAR IN JERUSALEM

I spoke to Marshall Levin. He will be happy to come to Jerusalem for the seminar. He raised two major issues that have been troubling him. One is problems they have in Baltimore resulting from Sara Lee's meeting with the Reform rabbis and educators. These Reform rabbis and educators expressed the fact that they believed that they are not involved as much as their colleagues in Atlanta and Milwaukee. And Marshall said that they (the professionals -- Daryl Friedman and himself) are "put on the line" versus their lay leadership.

Two -- they are very concerned about lay participation from Milwaukee at the May seminar. They feel that the Milwaukee lay leaders will speak to theirs and theirs will not understand why there is participation from Milwaukee and not from themselves.

We discussed the possibility of presenting this as differential stages in the lead communities project and that Milwaukee is further ahead than Baltimore. He somewhat went along with this but is not really satisfied.

Marshall will come to Jerusalem. We need to make reservations (I offered him the Moriah hotel -- Caroline could you please make reservations). He will probably be arriving on the 26th and returning by the late night flight on the night between the 29th and the 30th. He has to be back on Friday, the 30th.

Caroline will receive a pro forma invoice with details of reimbursement -- please take care of this immediately -- he needs payment right away. So, we should be in touch so that you can ask Cleveland to pay him. He will let you know whether to reimburse his travel agent or himself.

Shmuel -- I told him that you were the coordinator of the seminar and that all details would be forthcoming from you.

PROBLEM: We have not informed our other staff members in the United States that we are inviting Marshall. This needs to be done immediately in order to pre-empt any problems. Probably, Steve and Shulamith should be informed ASAP.

1

Quite a bit of grumbling still about CIJE getting its act together -- he knows about Shulamith.

c.c.:   Carmela Rotem

MEMORANDUM

TO: SF & SW

FROM: AH

DATE: MARCH 22, 1993

RE: CIJE -- LEAD COMMUNITIES
DESIRED OUTCOMES -- MARCH-SUMMER 1993

We need to get started in the lead communities on the following elements:

A.   Joint work -- CIJE-LC Now

1.   Develop pilot project

2.   Best practices in supplementary school
     a.   Present to various audiences
     b.   Work with educators and lay people

3.   Goals project
     a.   Work with training institutions and school people

4.   Relaunch the monitoring, evaluation & feedback project
     a.   The lives of educators and first complete report by
          the summer

B.   Process & Set-Up

1.   ~~Higher~~ Hire full-time project director

2.   Launch local commission

3.   Set-up task forces

4.   Do educators' survey

5.   Mobilize the leadership
     a.   Presentations to lay people
          rabbis
          educators
          professionals

6.   Work with training institutions

7 - Contact of communities

2

C.   <u>We will, in addition, do the following:</u>

1.   Provide expertise

2.   Help with new hires, if required

3.   Help with training institutions

D.   <u>Process at CIJE Level</u>

1.   Board

2.   Sub-comittees

3.   Funding/fundraising

4.   Work with foundations

5.   P.R.

<u>E.   Set next planning seminar date and launch work with training
institutions and LC together</u>

TO: SHMUEL

FROM: Annette

DATE: MARCH 21, 1993

Re: THE CIJE

Hello Shmuel,

I would appreciate it enormously if you would go through any CIJE
or May seminar related faxes, mail or other forms of
communication and would deal with them. If you make your
suggestions and recommenations, then Seymour or I will respond.
If I'm not in, maybe get to Seymour -- if I am in, we'll decide
how to move ahead.

Also what is important at this time is to make an initial list of
the things we want to achieve with the lead communities at this
time and prioritize them. By initial 'ist I mean those several
things that we need to move ahead with over the next few months
in order to proceed and see progress.

They include launching a pilot project and giving it visibility
so that the sense of progress be known and perceived throughout
the community.
They include the Educators Survey.
They include ongoing work with the loca' commission -- we need to
follow up on mobilization and scheduling in this regard.
And they include work with the best practices project in a
systematic way.

I suggest that you prepare an overview of where each community is
at as regards this -- it could even be in table form -- with a
sense of timing and of the input that is required from us. At the
same time, the place of the May seminar as a means of bringing in
the goals project and making progress on all of these should also
be taken into consideration.

It looks like we could have both Josh Elkin and Danny Pekarsky
take on a consulting role, each for one community. If we decide
that we want to go this route (something we ought to consider
already this week) we may want to try and bring them, or consider
bringing them to the simulation seminar at the end of April --
for consideration and for discussion.

Thank you very much for suggesting an agenda for tomorrow. I will
try to have maybe a short part of the day devoted to "show and
tell" -- that is to discuss each of the items that you are
suggesting for update -- and to focus on some of the key issues

facing the Institute at this time as the major part of the day.

I will also try to convene a meeting of Danny, Orianna, Estelle, yourself and me about the database as soon as I can -- depending on other things, I may try to convene it still today.

Shmuel, RE: PROJECT DESCRIPTION PAGE FOR BUDGET

I would appreciate it if you could give the CIJE page to Estelle -- she did not receive it on Thursday -- and the MAF one to me.

Another Matter

If it is O.K. with you, tell Ginny that we will take the Wednesday conference call time. Tell her that we will try for a couple of weeks and see where we are at. Please note that I will be in this week -- note for yourself but don't tell Ginny that I probably won't be here next week -- that will be for Seymour and yourself. Seymour should be informed; he should get a copy of the fax to Ginny telling about the Wednesday afternoon; Suzanna should also be informed; Orianna can do that for you -- about what time the telecon will be.

Thanks.

MEMORANDUM

TO: SHMUEL

FROM: ANNETTE

DATE: MARCH 17, 1993

Please add to the things we have in New York the following list:

2 more <u>Time to Act</u>'s; another copy of the proposals of YU and of HUC; and another set of the background papers to the Commission.

<u>Another Matter:</u>

Dear Shmuel,

In order to complete the budget proposal for this current year, we need to send descriptions of the projects. I am enclosing the 1992 descriptions of the MAF Consultation -- which this year is primarily work with the training institutions -- and of the CIJE, which as you know has exploded this year into something as big as you know.

Could you please prepare drafts of those 2 documents for 1993 making sure that the text is congruent with the proposed budget, and possibly relating to any major discrepancy in the budget this year versus the budget last year. This is fairly urgent since I must mail it all by next week. Thanks for your help.

<u>And yet another matter</u>

Shmuel, the CIJE wants a regular conference call with us. They are suggesting Friday, 3:00 or 3:30 (obviously from your home), or alternately, Tuesday or Wednesday 3:30 p.m. We are checking with everybody in order to know.

Will you please check with Seymour and me and yourself our ranking of preferences and let Ginny know by fax; then she will arrange over there.

<u>And yet again another matter</u>

I spoke at length with Ruth Cohen in Milwaukee and will need to make you connect with her. The lady feels enormously overwhelmed mainly in her work -- though she is clearly moving ahead better and more thoughtfully than all the others. At the same time, she probably does not know terribly much about the universe she is involved with or the tasks. I have a sense that she might bear a from time-to-time phone call to find out. So I would advise that what you might do is to plan a call, have me be in on the first minute or two by saying who you are, introducing you -- and giving it over to you so that you can give her ongoing advise. By

1

the way, the same might become true very quickly with Chaim Botwinik and we might want to do that. I don't know about Atlanta. Steve Gelfand has a very very hard time being positive.

MEMORANDUM

TO: SF & SHMUEL WYGODA

FROM: ANNETTE

DATE: MARCH 17, 1993

RE: MAY TRIP TO THE U.S.

We are planning for work in the U.S. that calls for a trip from May 9th-May 18th; work on the CIJE may be shorter by a couple of days.

I have asked Ginny to make arrangements for 3-4 consecutive days of meetings in Cleveland during this period, as follows:

1.   At least 1 initial day with the training institutions (Davidson, Abramson, Schiff, Hirt and Lee) to discuss work with the lead communities -- and possibly some work on their MAF grants. This would be followed by 2 days with the communities. In this scenario we might elect to invite the training institution representatives to remain for some, or all, of the first day of meetings with the communities. We might, for example, divide ourselves into two groups -- one who would work the second morning with the training institutions on a specific matter relating to them; and the other beginning the seminar with the communities while the second half of that day would be a joint one of the training institutions and the lead communities. All of that, of course, is to be simulated at the end of April -- the way we have scheduled our simulation.

The rest of the time would of course be our ongoing work with the communities.

Please note that Atlanta has now decreed once more that Seymour and Annette don't "hear" the communities well and have no understanding for Atlanta's difficulties in paying for their trip or giving staff time for the CIJE in May. I believe we ought to lay this notion to rest very quickly. We all know now that Atlanta professionals are not involving their lay leadership in any of the decisions. I have but little doubt following our meeting with the lay leadership that they would make staff time and funding probably a priority for the benefits that would accrue from active participation in the CIJE. I think we ought to advise among ourselves as to how to deal with this. (SHH and SRE have bought into the Atlanta staff line; thereby underscoring once more the different way that we work with lay leadership.)

Irrespective of any of this, I believe we want to move ahead with the meeting. Should we invite Marshall Levin to the first day with the training institutions?

8

Ginny will let us know about the scheduling -- this meeting will take place in Cleveland. I have told Ginny to leave 2 days open for our scan consultation in Boston, Seymour -- as we discussed. As soon as we get further data from Ginny, we will be able to complete logistical arrangements.

Shmuel -- I told Ginny that you would be the central person dealing with this seminar and that you would also be the central coordinator. So over to you!!!

Tel.   972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To:	Dr. Shulamith Elster	Date:	February 12, 1993
From:	Annette Hochstein	No. Pages:	2

Fax Number: 001-301-230-2012

Dear Shulamith,

Re: Agenda for Meetings with Communities

It was good teleconing yesterday: I think we are moving ahead rapidly. Here are some thoughts concerning your discussions with the communities re: the agenda for our visit.

As far as we are concerned, the following items are of priority:

1.   To clarify further our game plan and ideas so that the discussion with the communities, the deliberations with them, are focussed on the lead communities project. This would lead to mutual exchanges concerning how we and the communities want to best move ahead. (Also because Steve Gelfand's letter is so far from knowing the game plan we have.)

2.   To respond to the communities' needs in implementation:

    a.   Development of a pilot project
    b.   The local process: each community moving along with the establishment, the agenda, the development, of its local commission process at the rate appropriate to local circumstances. The planning guide may prove here a useful point of departure for communications.
    c.   The best practices project
    d.   Personnel needs (we would like to understand what senior educational personnel is needed/missing locally

and consider together with the community if we might
be able to assist in finding appropriate people)
   e. Working with the denominations -- where appropriate,
       developing the links and methods for working together
   f. Introducing the goals project (the idea of it)

3. Whatever the communities' needs are.
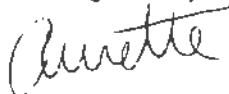
This is just meant as input for your own thinking as you develop
a draft agenda with them. I will respond to such draft(s) as soon
as you forward it/them to me.

As regards the issue of knowing what is happening on the planning
and educational development scene in each community -- your
question of the 10 questions to Lauren: I believe that what we
need most is for you to be fully informed as regards their
initiatives (e.g., are they doing an educators survey? If yes, is
that survey commensurate with the notion of comprehensiveness and
with the methodology that we had in mind when suggesting such a
survey? How does it fit in with the plan's thinking? At what
stage of development is it? Etc.). The same would be true for the
issue of the development of a training program at Emory
University.

I guess it is partly the function of reading their plans and
talking to them to find out what is really happening, or
happening already, so that we can be informed by you and have
thus an informed conversation with them. Tell me if this makes
sense.

Shabbat Shalom,

Best regards,

Annette

MEMORANDUM

TO: STEVE HOFFMAN, SHULAMITH ELSTER & GINNY LEVI

FROM: ANNETTE HOCHSTEIN

DATE: FEBRUARY 8, 1993

RE: LEAD COMMUNITIES: NEXT STEPS

Dear Fellow Travellers,

Despite the hectic schedule it was wonderful being with you. I
hope everyone got home safely and well.   So as not to forget --
and before reading formal minutes, I am faxing this preliminary
and probably incomplete list of what we need to produce, promises
made, meetings to convene or confirm, and steps that are
otherwise necessary in order to continue the job of building
credibility, momentum and good work in the lead communities.
Please see this as a random list which I'll be happy to see
integrated in any master list of assignments that Ginny may be
compiling. I have not related to the board meetings in this page.

a.   Documents:

1.   The planning guide should be produced and sent to the
communities within the next few days.

2. · The Best Practices Guide and Best Practices in the
Supplementary School document should be circulated among us at
the very end of this week or the beginning of next week, to be
produced during the week of the 15th and placed in the hands of
the communities before our next round of visits later in
February.

b. A pilot project for Baltimore:

     1.   Barry Holtz and Shulamith Elster to visit with the
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towards the design and development of a first pilot project. A
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SF, AH, BH, SRE, and the planners in Baltimore to further discuss
this. (Ginny could you please convene this meeting?)

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     1.   To remind us, Atlanta is asking for some funds to cover
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We ought to discuss and decide this very soon -- and then inform the communities as soon as possible.

f. I am working with Adam and Ellen on getting the monitoring, evaluation and feedback project in sync with the work in the communities and useful to the process.

g. Milwaukee: Howard Neistein wanted to be briefed on the agenda for our visit on the 22nd. Steve could perhaps talk to him in the same spirit that you prepared the other communities for our visit.

It is probably important to rapidly contact the communities - under whatever pretext, in order to let them know that we are following up on our visit, and that next steps are forthcoming.

Looking forward to hearing from you all,

Best regards,

Annette

2

TO: SHULAMITH ELSTER

FROM: ANNETTE HOCHSTEIN

DATE: FEBRUARY 7, 1993

RE: MILWAUKEE -- COMMISSION AGENDA

Dear Shulamith,

I hope that you have returned safely and recovered from the busy week we had together. Upon my return home, I read the minutes of the last meeting of Milwaukee's Steering Committee (thanks for forwarding them) and would like to point to a challenge there.

I find it difficult to understand how the agenda that was discussed reflects that of the CIJE or of the Lead Communities Project. One get the sense that Milwaukee is proceeding as if it were setting up again a commission on Jewish education or Jewish continuity without the benefit of the work already accomplished. Of course from my distance I do not know if this is just my perception based on a document or if it is fact. We need your guidance on that. If this is indeed the case, I recommend that we undertake a number of steps that might help modify the agenda for the first plenary meeting of Milwaukee's commission on February 25.

1.   Find out if Dr. Cohen, the planner in Milwaukee, has received and read the following documents:

a.   <u>A Time to Act</u>
b.   The background materials to the 5 Commission meetings.
c.   The Commission research reports.
d.   The 3-year plan of the monitoring, evaluation, feedback project.
e.   Barry Holtz's memo to the Senior Policy Advisors and maybe the paper that was given to the Board of the CIJE I believe last year.
f.   "Lead Communities at Work" (pointing out that this is a document for discussion).
g.   The planning guide -- as soon as it is ready.

If she has not read read these I believe it is urgent to give these documents to Dr. Cohen, and to begin with her the substantive dialogue that needs to be undertaken. If she has received all of these materials, I believe it may be useful to have with her a conversation on how Milwaukee is considering getting to the agendas of dealing with the shortage of personnel and community mobilization. Of course we will be in Milwaukee on the 22nd and that will give us an opportunity to discuss or being

discussing this together -- but given the proximity to their Board meeting, I believe it would be very useful if you could have this conversation as early as possible.

2.   For fear of belaboring the point: I believe it is important that you accompany Barry Holtz on the 16th of February to Milwaukee in order to provide continuity in whatever dialogue can take place. I hope that there will be a meeting of Barry with Dr. Cohen during that day.

Any news on dates for a visit by Barry and you to discuss to the pilot project in Baltimore? Please let me know.

I look forward to hearing from all of you very soon.

Best regards,

Annette

c.c.: Ginny Levi

MEMORANDUM

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c.c.: Ginny Levi

MEMORANDUM

TO: STEVE HOFFMAN, SHULAMITH ELSTER & GINNY LEVI

FROM: ANNETTE HOCHSTEIN

DATE: FEBRUARY 8, 1993

RE: LEAD COMMUNITIES: NEXT STEPS

Dear Fellow Travellers,

Despite the hectic schedule it was wonderful being with you. I
hope everyone got home safely and well.   So as not to forget --
and before reading formal minutes, I am faxing this preliminary
and probably incomplete list of what we need to produce, promises
made, meetings to convene or confirm, and steps that are
otherwise necessary in order to continue the job of building
credibility, momentum and good work in the lead communities.
Please see this as a random list which I'll be happy to see
integrated in any master list of assignments that Ginny may be
compiling. I have not related to the board meetings in this page.

a.   Documents:

1.   The planning guide should be produced and sent to the
communities within the next few days.

2.   The Best Practices Guide and Best Practices in the
Supplementary School document should be circulated among us at
the very end of this week or the beginning of next week, to be
produced during the week of the 15th and placed in the hands of
the communities before our next round of visits later in
February.

b. A pilot project for Baltimore:

     1.   Barry Holtz and Shulamith Elster to visit with the
planners in Baltimore and undertake conversations with them
towards the design and development of a first pilot project. A
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It is probably important to rapidly contact the communities – under whatever pretext, in order to let them know that we are following up on our visit, and that next steps are forthcoming.

Looking forward to hearing from you all,

Best regards,

Mandel Institute

מכון מנדל

Tel.   972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To: _____Mr. Steve Hoffman_____   Date: _____February 7, 1993_____

From: __Annette Hochstein_____   No. Pages: _____

Fax Number: _____

Dear Steve,

I have watched the video tape you gave me with great interest. Just wanted to let you know that I think it succeeds in conveying several messages that may be useful for the lead communities: A sense of much thoughtful activity, a focus on personnel, the possibility of allocating significant additional funds to education, the role of Israel, the involvement of articulate and convincing leadership and more.

I would feel very comfortable giving copies of this video to the lead communities, for their own use -- whether in their commission or in other appropriate settings.

At the same time, I thought while watching it how good it would be if we could produce (if perhaps one could produce in Cleveland?) a similarly convincing tape but that would focus on the thoughtful planning process that is required in order to lead to quality programs. Such a tape would, or could, focus both on the work of the commission and articulate its principles and perhaps deal with the various elements -- from best practices to the articulation of goals. Of course that should not delay the

use of the Cleveland tape, which would appear on the scene as a "best practice."

Looking forward to hearing from you.

Best regards,

Annette

c.c.: Ginny Levi

MEMORANDUM

TO: SHMUEL WYGODA

FROM: ANNETTE

DATE: FEBRUARY 7, 1993

Dear Shmuel,

We should try and meet on Wednesday during the morning in order
to discuss our agenda, including your trip to the U.S. and work
for the CIJE as well as the training institutions issue.

Please make sure that you see any documents that I brought back:
I brought back documents from the communities, though I was the
source of most documents. The main thing that is new is Jack
Ukeles' planning document. You can wait till it arrives by mail --
-which should be any of these days -- before you read it. It will
be in the hands of the community mid-week, this week. I hope that
a best practices document will be forthcoming next week.

Thanks.

Dear Shmuel,

We are considering the possibility of organizing a seminar in
Jerusalem with representatives of the training Institutions
(Aryeh, Sara Lee, Shiff, anyone else); the JCCA and our
own staff (Barry and Shulamith -- possibly Ginny), to work on a
three-topics agenda:

1. The contributions of the training institutions to the
Lead Communities

2. The educated Jew project -- towards implementation (really
first acquaintance: Twersky, Brinker and Greenberg will all
be here at that time and can present/teach/discuss).

3.The personnel training programs (MAF grants)

The seminar could take place at the Mandel Institute
during the third week in March (I am leaving on the 28th
and want to be here the whole time - so it should end no later
than the 26th).

Alternative dates should be looked into -- e.g. after Pessah.
The problem is that we should not delay - in order to use
good will and enthousiasm and to gear up for real things with
the communities.

If you like the idea, the seminar is yours to organize (of

course with Caroline to work with you on all practical,
organizational and administrative matters).

If you like the idea after thinking about it, I suggest that
you do some initial elaboration and discuss it during this
week with Seymour. It should be 3-5 days long, very intensive,
very productive, very rich, and at the same time
swend people away energized and equipped for actual progress.

Please give a copy of this Seymour and to Caroline,

Shabbat Shalom

Annette

MEMORANDUM

TO: SHMUEL WYGODA

FROM: ANNETTE

DATE: JANUARY 31, 1993

Shmuel,

If I did not speak to you then I'd like you to know that I did speak to Shira on Friday. I also spoke to Allan and suggest that you take advise with him.

Also found out the following: some people have been accepted and will most probably choose another school; some candidates were told in their letter of refusal that they have been wait-listed.

I do hope that things work out and wish you very much good luck.

Annette

August 12, 1992

LEAD COMMUNITIES AT WORK

A. INTRODUCTION

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

1. Build the profession of Jewish education and thereby address the shortage of qualified personnel;

2. Mobilize community support to the cause of Jewish education;

3. Develop a research capability which will provide the knowledge needed to inform decisions and guide development. In Lead Communities this will be undertaken through the monitoring, evaluation and feedback project;

4. Establish an implementation mechanism at the local level, parallel to the Council for Initiatives in Jewish Education, to be a catalyst for the implementation of these recommendations;

5. The fifth recommendation is, of course, the lead community itself, to function as a local laboratory for Jewish education.

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

B. THE SCOPE OF THE PROJECT

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

1

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

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

3. The Lead Community project will deal with the major educational areas — those in which **most people** are involved at some point in their lifetime:
   - *Supplementary Schools*
   - *Day Schools*
   - *JCCs*
   - *Israel programs*
   - *Early Childhood programs*

   In addition to these areas, other fields of interest to the specific communities could also be included, e.g. a community might be particularly interested in:
   - *Adult learning*
   - *Family education*
   - *Summer camping*
   - *Campus programs*
   - *Etc...*

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

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

C. VISION

A Lead Community will be characterized by its **ongoing interest in the goals** of the project. Educational, rabbinic and lay leaders will project a vision of what the community hopes to achieve several years hence, where it wants to be in terms of the Jewish knowledge and behavior of its members, young and adult. This vision could include elements such as:
   - *adolescents have a command of spoken Hebrew;*
   - *intermarriage decreases;*
   - *many adults study classic Jewish texts;*
   - *educators are qualified and engaged in ongoing training;*
   - *supplementary school attendance has increased dramatically;*

2

- *a locally produced Jewish history curriculum is changing the way the subject is addressed in formal education;*
- *the local Jewish press is educating through the high level of its coverage of key issues.*

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

1. At the communal level the leadership would develop and articulate a notion of where it wants to be, what it wants to achieve.

2. At the level of individual institutions or groups of institutions of similar views (e.g., all Reform schools), educators, rabbis, lay leaders and parents will articulate the educational goals.

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

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

D. BUILDING THE PROFESSION OF JEWISH EDUCATION

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

1. Hire 2-3 additional outstanding educators to bolster the strength of educational practice in the community and to energize thinking about the future.

2. Create several new positions, as required, in order to meet the challenges. For example: a director of teacher education or curriculum development, or a director of Israel programming.

3. Develop ongoing in-service education for most educators in the community, by programmatic area or by subject matter (e.g.the teaching of history in supplementary schools; adult education in community centers).

3

4. Invite training institutions and other national resources to join in the effort, and invite them to undertake specific assignments in lead communities. (E.g. Hebrew Union College might assume responsibility for in-service education of all Reform supplementary school staff. Yeshiva University would do so for Orthodox day-schools.)

5. Recruit highly motivated graduates of day schools who are students at the universities in the Lead Community to commit themselves to multi-year assignments as educators in supplemen- tary schools and JCCs.

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

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

E. DEVELOPING COMMUNITY SUPPORT

This could be undertaken as follows:

1. Establishing a wall-to-wall coalition in each Lead Community, including the Federation, the congregations, day schools, JCCs, Hillel etc...

2. Developing a special relationship to rabbis and synagogues.

3. Identify a lay "Champion" who will recruit a leadership group that will drive the Lead Community process.

4. Increase local funding for Jewish education.

5. Develop a vision for Jewish education in the community.

6. Involve the professionals in a partnership to develop this vision and a plan for its implementation.

7. Establish a local implementation mechanism with a professional head.

8. Encourage an ongoing public discussion of and advocacy for Jewish education.

F. THE ROLE OF THE CIJE IN ESTABLISHING LEAD COMMUNITIES

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

1. *BEST PRACTICES*

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

The Best Practices initiative has several interrelated dimensions. In the first year the project deals with best practices in the following areas:
* *Supplementary schools*
* *Early childhood programs*
* *Jewish community centers*
* *Day schools*
* *Israel Experience programs*

It works in the following way:

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

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

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

2. *MONITORING EVALUATION FEEDBACK*

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

a. To carry out **ongoing monitoring of progress** in Lead Communities, in order to assist community leaders, planners and educators in their work. A researcher will be commissioned for each Lead Community and will collect and analyze data and offer it to

practitioners for their consideration. The purpose of this process is to improve and correct implementation in each Lead Community.

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

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

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

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

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

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

The first question is essential for establishing that specific goals exist for improving Jewish education, and for disclosing what these goals are. The second and third questions concern

the "enabling options" decided upon in *A Time to Act* , the areas of improvement which are essential to the success of Lead communities: mobilizing community support, and building a profession of Jewish education.

3. *PROFESSIONAL SERVICES*

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

a. Educational consultants to help introduce best practices.

b. Field researchers for monitoring, evaluation and feed-back.

c. Planning assistance as required.

d. Assistance in mobilizing the community.

4. *FUNDING FACILITATION*

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

5. *LINKS WITH PURVEYORS OR SUPPORTERS OF PROGRAMS*

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

G. LEAD COMMUNITES AT WORK

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

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

a. It would convene all the actors;

b. It would launch an ongoing planning process; and

c. It would deal with content in the following manner.

1. It could make sure that the content is articulated and is implemented.

2. Together with the team of the Best Practices project and with the Chief Education Officer, it would integrate the various content and programmatic components into a whole. For example: it could integrate formal and informal programs.

It could see to it that in any given area (e.g., Israel experience) the vision piece, the goals, are articulated by the various actors and at the various levels:
*   *by individual institutions*
*   *by the denominations*
*   *by the community as a whole.*

In addition, dealing with the content might involve having a "dream department" or "blues-kying unit," aimed at dealing with innovations and change in the programs in the community.

H. LAUNCHING THE LEAD COMMUNITY — YEAR ONE

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

1. Negotiate an agreement with the CIJE including:

    a. Detail of mutual obligations;

    b. Process issues — working relations within the community and between the community, the CIJE and other organizations

    c. Funding issues;

    d. Other.

2. Establish a local planning group, with a professional staff and with wall-to-wall representation.

3. Gearing-up activities, e.g., prepare a 1-year plan, undertake a self-study (see 6 below), prepare a 5-year plan.

4. Locate and hire several outstanding educators from outside the community to begin work the following year (1993/94).

5. Preliminary implementation of pilot projects that result from prior studies, interests, communal priorities.

6. Undertake an educational self-study, as part of the planning activities:

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

a. Assessment of needs and of target groups (clients).

b. Rates of participation.

c. Preliminary assessment of the educators in the community (e.g., their educational backgrounds).

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

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

THE CIJE – PRELIMINARY WORKPLAN 1992/1993

A. Function, Structure and Staffing Assumptions

The following assumptions guide this plan:

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

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

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

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

B. Establishing Lead Communities

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

1

C. Elements of the Workplan for Lead Communities

- *Immediate: Preparation, Negotiations and Launch*

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

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

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

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

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

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

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

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

   a) Provide planning guidance and guidance for the community mobilization process (community organization and ongoing trouble- shooting). Prepare guidelines and

discuss them with the communities. Assist as needed in the establishment of a strong planning group (committee, commission), with wall-to-wall representation.

b) Negotiate with foundations, organizations and purveyors of programs the nature of their involvement and their contribution to lead communities. Begin training them for the assignment (e.g., discuss the institutions of higher Jewish learning, their role in in-service and pre-service training, as well as their role for the articulation of visions or goals of Jewish education; work with the JCCA, JESNA, CAJE, CLAL; approach program-oriented foundations with specific programs). This requires preparing back-ground documents — for example, what would the Israel experience be in a lead community — and discussing with the appropriate organization or foundation their interest in taking all or part of the program upon themselves.

c) Provide funding facilitation as required.

d) Provide planning guidance for:

1) The self-study

2) The one-year plan

3) Pilot projects to be launched in year 1

4) The five-year plan

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

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

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

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

i) Develop networking between communities.

j) Develop means of communications and P.R.

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

- *Ongoing Work—General CIJE and Related to Lead Communities*

1) Board meetings (August and February), executive group, board committees (lead communities, Monitoring/Evaluation, Best Practices) and camper assignments.

2) Senior advisory group meetings or conference calls.

3) Monthly CIJE-lead communities planning seminar.

4) Fundraising.

5) Ongoing contacts with constituencies (organizations, purveyors of programs, foundations, lay leaders, educators, rabbis).

6) Staff meetings (for planning and discussion of educational content – twice a year).

7) Guidance to key projects.

8) Networking with educators, organizations and institutions.

9) Plan the second and third years of the project.

D. Beyond Lead Communities:

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

1. *Community mobilization and communications*

Plan and launch the activities that will help mobilize communities, organizations and leaders to Jewish education and create more fertile grounds for access to the resources required (beyond the three communities selected). Areas of endeavour might include:
   - Work with the 23 applicant communities to the Lead Communities Project (or with any differently defined large group of communities) to capitalize on goodwill, initial interests, local initiatives. This should initially include a very limited number of activities – until the CIJE's work load permits more. For example: during the coming year one might convene once or twice representatives of the communities to share with them two topics
     – findings of the Best Practices Project and methodology of the Monitoring, Evaluation and Feedback Project
     – and meetings with programs and representatives of programmatic foundations (CRB for Israel; Melton for the adult mini-school; Revson for media; etc.).

4

- Launch a communications program that will continue the work begun with the publication of A Time to Act.

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

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

2. *Building the profession of Jewish education*

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

3. *Developing a research capability*

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

4. *Establishing lead communities*

(See above).

January 26, 1993

Fall Seminar – Some Suggestions

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

The components might include:

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

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

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

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

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

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

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

    b. The Best Practices Project: presentation and discussion – includes consultants on content.

    c. Monitoring, Evaluation and Feedback: same.

    d. Planning:
        - *self-study*
        - *pilot projects*
        - *one year plan*
        - *five year plan*
        - *the ongoing CIJE seminar*

5. Networking among lead communities.

6. Meetings with organizations, purveyors of programs and programmatic foundations: to discuss specific interests and projects
    - *in-service training programs*
    - *CAJE*
    - *JESNA*
    - *JCCA*
    - *the Melton mini-school*
    - *the CRB foundation*
    - *etc.*

7. Closing session and discussion of next steps.

PREPARATION FOR COMMUNITY VISITS

1. First simulation of projects:

   a. Goals project (document?)
   b. Pilot projects
   c. Best practices

2. Top-down, Bottom-up

3. The lead communities idea versus their plans, ongoing strategic planning process, declared priorities, etc.

4. Federations versus denominations

5. What does the CIJE contribute to this?

6. The $40,000

7. The CRB problem

8. What an educator/rabbi/lay person should know

9. What documents should be handed out?

10. Overall strategy
    Initial presentation
    New documents required?

11. The letter of agreement or its elements

12. Timeline

January 24, 1993

Dear Hank and Ginny,

Following our telephone conversation I am fowarding to you
various documents regarding the CIJE and Lead Communities. You
probably have seen some of them.

The enclosed materials include the following:

a)   CIJE/Lead Communities -- General Material

1)   "Lead Communities at Work."
2)   The CIJE -- Preliminary Workkplan 1992/1993.
3)   Set of transparencies used for presentation at November
      Planners Workshop.
4)   Minutes of the Lead Communities Planning Workshop --
      November 1992, New York City.
5)   A ten point agenda for work in the Lead Communities --
      worked out by AH & SW with SRE.

b)   Monitoring, Evaluation & Feedback Project

1)   Monitoring, Evaluation and Feedback in Lead Communities --
      Tentative plan of work for 1992-1993.
2)   Monitoring, Evaluation and Feedback in Lead Communities: A
      Three Year Outline.

c)   Best Practices Project

1)   Field reports on supplementary schools (full Holtz document
      forthcoming next week).

d)   Planning

1)   First draft of the letter of understanding.
2)   Second version of the letter of understanding -- following
      Ukeles negotiations.
3)   Memo by AH to AR re: letter of understanding.
4)   A draft of the "Planning Guidelines" was prepared. I am
      heavily revising it. Will be ready by early February. Our
      revisions on first 10 pages enclosed for your information.

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e)   Materials on the Communities

1)   Memo by SE to AR re: Baltimore.
2)   Minutes of the Milwaukee Steering Committee on Jewish
      Education.

We will redesign the documentation loop and copies of all new
documents should come to you straight.

Hope this is helpful.

Best regards,

January 19, 1993

Ms. Sara Lee
Director, The Rhea Hirsch School of Education
Hebrew Union College
3077 University Ave.
Los Angeles, CA 90007-3796
U.S.A.

Dear Sara,

Following your conversations with Seymour, we are pleased to
forward to you a package of materials that may be useful towards
your forthcoming early February meetings.

All the documents are internal, non-published documents of the
Mandel Institute -- we are sending them for your use only in the
hope that you will find them interesting and of help. We have
included the following:

A.   The Educated Jew Project

1.   "The Educated Jew" -- 1991 Executive Summary for our board
members.

2.   Draft paper by Prof. Isadore Twersky.

3.   Draft paper by Prof. Moshe Greenberg.

4.   Draft paper by Prof. Menachem Brinker.

5. & 6. Papers by Prof. Israel Scheffler.

7.   Paper by Prof. Michael Rosenak.

B.   The Lead Communities -- General

1.   Lead Communities at Work (very internal working paper).

2.   Monitoring, Evaluation & Feedback in Lead Communities:
Workplan for 1992/1993.

3.   Latest memorandum from Barry Holtz on the Best Practices
Project.

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These documents on the Educated Jew Project represent the background thinking that might inform approaches to the goals project. The documents on Lead Communities illustrate the overall thinking within which the development of visions, goals, mission statements for specific institutions, movements or for the overall community would be inserted.

As you well know, it is our belief that an ongoing interest -- increasingly profound and informed -- in the goals of Jewish education by educational, rabbinic and lay leadership will be one of the important means and assets for ensuring the quality of Jewish education in the community.

* * *

You may want to consider and discuss several possible roles for your Movement in the lead communities. These range from taking leadership in the above-mentioned subject of goals to taking leadership in providing additional outstanding personnel for the Reform Movement's schools and programs in the lead community to engaging your educational, rabbinic and lay leadership in thinking and planning about all of these, to developing systematic in-service training for the rabbinic and educational personnel in the community's Reform schools.

The following are some further elaborations on these points:

1.   Setting educational goals: What role would you want to take as regards helping or leading local institutions and your own constituencies in defining their vision and goals for Jewish education? There are many possible ways to go about this effort. One possibility is to identify a qualified individual who would be charged with coordinating this effort in the lead communities (his or her function might be limited to one project or be an overall coordinator for all your efforts in one or all lead communities). You may find a conversation with Aryeh Davidson useful -- the Conservative Movement has begun to work on this complex and you may find it useful to hear how they are going about it.

2.   Personnel in lead communities: The question of the educational and rabbinic leadership, their mobilization, their training, the staffing of programs, the possible in-service educational efforts that may need to be developed -- all of these related to the central resources of the Movement and to your own definition of the role you want to have in the lead communities.

3.   As you know, the Best Practices Project is gearing up for early work in the communities. Its first effort has been in the area of supplementary education. The issue of how the Movement might want to use, adapt, adopt, translate, implement the findings of the Best Practices Project -- particularly in the

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areas of personnel and program -- to the Reform Movement's
supplementary or day schools in the lead communities should be
addressed. You may want to discuss this with Barry Holtz.

We have not related here to the overall role that Reform rabbis
and educators might want to play in the governance of the lead
communities project -- commissions are being formed, taskforces
and subcommittee will probably be formed in the coming year. In
all of those you may want to look into what would be an
appropriate and effective role for the Movement to take.

We hope that this is useful or helpful and are certainly
available for any further clarification or documentation that you
may require.

Warm regards,

Annette Hochstein & Shmuel Wygoda

TO: Dr. Shulamith Elster   January 18, 1992

From   Annette Hochstein & Shmuel Wygoda

Dear Shulamith,

Re: The Planning Guide

We are forwarding to you a heavily revised version of the first
part of the planning guide. Of course what I added needs
language editing to fit within the tone of the whole document.
We would love to have your comments on this and would
appreciate your giving copies to Art Rotman and Jim Meier/Jack
Ukeles. Would you like to set up a conference call with Jim,
Jack, yourself and us here to discuss the next draft? It would
be great if that could be the final one.

Best regards,

Annette

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FACSIMILE TRANSMISSION

TO: H.L.Zucker and V.F.Levi

FROM: Annette Hochstein

DATE: 15/1/93

===

Re: Contacts with Communities

The attached memos may help to further clarify the issue of contacts with the lead communities. They include:

Exhibit 1. -- memo to A.R. of December 7 - I don't believe he dealt with this agenda when visiting Baltimore . The other communities were not visited.
Exhibit 2.-- memo to you summarizing contacts between CIJE and Lead Communities -- this is based on our best information to date.
Exhibit 3. -- memo to A.R. concerning negotiations on the letter of agreement.

Though circumstances have shifted and time has passed I think some of this is still very relevant -- though it needs to be somewhat adjusted.
It may be useful to share some or all of this material with SHH.

Hope this is helpful,

Shabbat Shalom and Mazal Tov!

Annette

- 1 -

EXHIBIT 1

Mandel Institute   מכון מנדל

For the Advanced Study and Development of Jewish Education

December 7, 1992

Mr. Arthur Rotman

Dear Art,

Re: Your Visit to the 3 Lead Communities

December 1992

In our conversation in New York last week, we agreed that it
would be important for you to visit each of the lead communities
at the earliest possible time, in order to discuss next steps
with community leadership (both lay and professional) and to get
actual work underway in each community.

I cannot tell you how pleased I was to learn that you have in
fact found the time to go to the communities this week and next -
- I believe your visit will be of significant benefit to the
process and the project. The following notes may be useful for
your visit.

A.   DESIRED OUTCOMES

Optimally, your trip would have the following outcomes:

1.   You would help lay and professional leadership identify next
steps in the process. This would result in full-scale operation
of the local commission (e.g., preparation of the 5-year plan;
decision on an action plan for the current year including pilot
projects). It would also pave the way for Barry and Shulamith to
begin work with the educators and the rabbis (e.g., the best
practices project for supplementary school teachers) and allow
the field researchers to carry on with their work (the feedback
to communities). In other words, the CIJE could then make its
full contribution to the community (see details below).

2.   An early step might be the proposed meeting between key CIJE
board members and top local leadership to discuss the project,
the role of the lead communities and of the CIJE, leadership

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mobilization for the local commission, funding, staffing, etc.

3.   Negotiate further the letter of understanding (separate memo forthcoming).

4.   Get the planners further on board. We need to find a way for the planners to encourage the actual intensive launch to take place, even before special staff is hired -- or to hire immediately staff that could dedicate all their time to the project.

5.   Further the joint agreement and understanding as to the following steps in the process:

a.   Staff the project locally with paid, dedicated staff -- planner or educational planner -- at least half-time, but preferably full-time.

b.   Set up the local commission and if it already exists, ascertain the calibre of leadership.

c.   Review the commission's assignments:

1.   Prepare an action plan for the current year that would include pilot projects in the areas of personnel and community leadership (these would be defined and designed with Barry Holtz, but might include, for example, a summer leadership seminar in the U.S. or in Israel; an in-service training program for principals and directors of educational institutions; a leadership training program for members of school boards).

2.   Begin addressing the content and its application in specific settings: introduction of the best practices project -- beginning with supplementary schools and early childhood programs (Barry Holtz).

3.   Prepare a 5-year plan for dealing with the enabling options and with the Israel Experience (see A Time to Act).

4.   Assessment of the community's Jewish educational system -- its resources, strengths, weaknesses. Begin perhaps with a survey of the educators (their qualifications, numbers, scope of positions, training needs) ..- Guides are forthcoming for the 5-year plan and the assessment of the community's educational system. (Ukeles and Meier.)

6.   In sum, your meetings might include the following items:

a.   Getting the leadership further onboard, comfortable with the recommended process (see "c." above) -- the current year being a planning year and a year for pilot projects; joint design of the lead communities project by the CIJE and the communities through

2

an ongoing planning effort throughout the year. A desired outcome of your visit would be the possibility for local and CIJE staff to systematically introduce the idea of lead communities to the various actors in the community.

b.   The content: preparation of a 5-year plan that focuses on dealing with the shortage of qualified personnel (e.g., strengthen in-service training opportunities; new hires) and on community mobilization for Jewish education. This would include:

1. Pilot projects for immediate, or early, implementation.

2. Introduction of the best practices project to the educators, rabbis and to leaders in the community.

3. Discussion of the vision and goals for Jewish education at several levels in the community.

4. Monitoring and evaluation with the purpose of giving feedback to the community and the CIJE as to how work is progressing and what the impact of the effort is.

                    * * * * * * *

B.   BACKGROUND NOTES:

1.   Since selection of the communities, the contacts with the CIJE have dealt with the following: the letter of understanding, the field workers (monitoring, evaluation, feedback loop), the November Planners' Workshop in New York, selected contacts with local organizations. These contacts have involved Shulamith Elster and Jack Ukeles in 1-3 meetings in the communities plus a large number of telephone contacts and of course they have involved you in many contacts.

2.   Important beginnings have taken place. We now want to move towards an action plan for the current year.

3.   In each community one or more federation planners have been appointed to be currently. the key local professionals for the lead communities project. They do this in addition to their normal workload, and until paid staff is hired. This places a limit on the amount of work that can be done at the present time.

4.   In each community, a lay person has taken the leadership position, to be the Chair of the Lead Community Committee or Commission. The calibre of leadership needs to be ascertained (are these the "champions" that will give leadership and resources to the project?).

3

5.   In each community there is a commission or committee, completed or in formation. It was not clear how effectively this group has been convened at the present time.

6.   Leadership mobilization: lay, professional, educational and rabbinic leadership needs to be brought on board. It is not clear at the present time what the needs of each of these groups is and we ought to devise ways of finding out. Key CIJE leadership, such as MLM or CRB, might help in finding this out for lay leadership.

First steps have already been taken as regards federation planners, local leaders who are CIJE board members, and additional individuals.

* * * * * * *

It is clear that there have been good beginnings and that certain people have been informed of the project. Our challenge now is to find the appropriate venues to discuss with the communities what the project entails, why it holds the great hopes it does, and how we will jointly move ahead with it.

EXHIBIT 2

Henry L. Zucker & Ginny Levi   January 15, 1992

1993

Annette Hochstein & Shmuel Wygoda

Dear Hank,

Re: Contacts between CIJE and Lead Communities

This is a summary of contacts to date between the CIJE and the
Lead Communities -- to the best of our knowledge.

1.   Preliminary contacts during the selection process:

During the final round of the Lead Communities selection
process a site visit by a CIJE delegation took place in each of
the lead communities. This included a lay person (MLM for
Atlanta; Charles Bronfman for Baltimore; Chuck Ratner for
Milwaukee), a professional and Shulamith Elster. During that
site visit the delegation met with leadership and professionals
in the community. During this period there were ongoing phone
contacts between Jack Ukeles, his office staff, Shulamith
Elster and the lead communities.

2.   Since the selection of the communities (End August 1992)

a.   One or two meetings between the planners in each of the 3
lead communities and Jack Ukeles and Shulamith Elster to
discuss a proposed letter of understanding. In some cases lay
people were present part of the time. The letter of
understanding was never finalized. It is a problematic
document – partly because it is not the result of jointly
developed understandings between the CIJE and Lead Communities.

b.   Ongoing telephone contacts between community planners,
Federation execs and Art Rotman; community planners and
Shulamith Elster. These are many administrative. recently these
have included concern about the lack of follow-up on process
and materials, by the CIJE.

c.   Several contacts between community planners and Jack Ukeles/Jim Meier (since December Jack's assignment no longer includes contacts with communities).

d.   A full-time field researcher has moved into each of the 3 communities for the monitoring, evaluation and feedback project:

Atlanta: Claire Rotenberg
Baltimore: Julie Tamivaraa
Milwaukee: Roberta Goodman

The field researchers are limited in their contacts with the community by the planners, because of the perception that the project has not really started.
 At the same time they have become the round-about conduit for introducing the Lead Communities idea into the communities -- since they have been talking to the largest number of people. While they are collecting baseline data that may be very useful for understanding the launch process and later for viewing progress in the community, their presence is uneasy in the absence of other CIJE activity.

e.   The G.A.: The CIJE held two events at the G.A. -- one forum and one festive breakfast meeting with representatives from the Lead Communities.

f.   Planners' workshop in New York: November 23-24. A workshop of CIJE staff with planners from each Lead Community was held in New York on November 23-24, 1992. The gap in preparations, expectations, communications was brought to the fore at this meeting.

 Art sent a note to the communities in early December telling then that AH was appointed Director of the Lead Communities Project. This confused matters even further. Since that time, there have been contacts between Shulamith Elster and community planners, as well as additional educators and some lay people.

3.   Community-by-community

a.   Atlanta:

Steve Gelfand -- the assistant federation executive for planning -- has put a halt to plans for a visit by Art Rotman to Atlanta, making it conditional upon the CIJE agreeing to fund the Lead Communities planner position for the ($40,000). We have not responded further.

b.   Baltimore:

2 4

1.   Art Rotman visited the community December and met with Darrell Friedman, Marshall Levin (planner) and Haim Botwinik (BJE head). The key topic was a proposed visit by Charles Bronfman later in the year. (see Exhibit 1)

2.   Shulamith Elster made a presentation to the Board of Directors of the BJE.

3.   Local commission: Baltimore has a strategic planning process underway for its Jewish education. Its and has local commission may become the lead communities steering committee.

c. Milwaukee

1.   Visits: Shulamith Elster has visited several times with Milwaukee where Howard Neistein has been the most active of the communities planners: a local steering committee, co-chaired by Jane Gelman and Louise Stein, has met on December 14th and is scheduled to meet again on January 19th to set up a commission on the lead community project. Shulamith Elster met with the Principals' Council and with lay leadership, as well as with foundation heads (the Bader Foundation).

EXHIBIT 3

Mandel Institute

מכון מנדל

Tel. 972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To: _____Mr. Arthur Rotman_____   Date: _____December 10, 1992_____

From: _____Annette Hochstein_____   No. Pages: _____

Fax Number: _____

Dear Art,

<u>RE: Letter of Understanding</u>

I am responding to the draft of the letters of understanding for Atlanta, Baltimore, and Milwaukee as forwarded to me by Jack on the 2nd of December -- these differ from the earlier versions I had.

As discussed at our meeting of November 23rd with MLM, the letters do not represent the joint understanding that would result from a mutually agreed design of the project. Rather, they represent the communities' understanding of the project at this time (see in particular the preambles to the letter referring to the CIJE as aassisting them in their current plans).

While it would perhaps be preferrable to go to work without this written agreement, it may not be possible to do so. Therefore, it was decided to include a specific clause limiting the agreement to one year. This is in order to allow us to negotiate the "real" agreement during the current year as the elements of the projects, the resources required and the contributions of the CIJE and of the community become specific and clear.

The current letter is also problematic on the following particulars:

1.   The total amount of money a community will commit;
2.   The need to hire special staff for the project; and
3.   The definition of the current year as a planning year -- while both parties would want it also to be an action year (e.g., pilot projects).

I hope these notes are useful towards your meetings in the communities -- any progress from the current version would be great. You will certainly find out whether and how it is possible to progress from the current version.

Best regards,

Annette

Mr. Arthur Rotman   January 13, 1992

Seymour Fox & Annette Hochstein

Dear Art,

Re: Your Fax of January 11th Concerning ~~the~~ Work with the
                        Lead Communities

*Thank you for the Fax - I ~~In your fax~~ ~~Indeed,~~ The materials that you mention are ~~obviously~~ part of a
far broader plan ~~that we~~ need to address step-by-step in order to
have the communities on board and happily working. I attach 2
documents that may help to set the required sequence back as a
target:

with A H

A suggested workplan (prepared for you in the early Fall; and
the memo towards your visit to Baltimore (December X).

What we need to remember is that at the present time the planning
guides and best practices papers ~~~~ (for which we, to the best of
our recollection, never offered target dates and both of which
will be in your hands no later than the first week of February)
are support materials for commissions that have not yet been
recruited, informed, presented with an overall project, gotten
into agreement with, let alone be ready to utilize those
materials.

All these elements: recruiting top leadership, introducing the
idea systematically to lay, professional, and educational
leadership, coming to a clear understanding of mutual obligations
and coming into agreement on these, forming a wall-to-wall
coalition of key actors in education or for education in the

community within the framework of a local commission for Lead Communities -- all of these are preliminary steps that still need to be completed.

Within this framework we would like to relate to each of the items you mentioned and make clear when and how they will be made available:

1.   The planning guidelines -- we are involved in significantly rewriting the latest draft received from Jim Meier -- transforming it from a general planning document to one that reflects the content of the Commission's work and intent. The planning guide should be completed by the end of this month and be in the hands of communities, if approved, by the first week in February.

2.   The best practices project -- a document, ~~for~~ far exceeding one best practice area because it will be a general guide to the project and its implementation, will be available by the first week of February too.

3.   We are involved in ongoing work with the educational leadership in the denominations to prepare them for their role in dealing with vision statements with their constituencies within the communities. Our paper on this topic will be available within 10 days. However, in the absence of an active local structure (~~with all due respect,~~ the planners alone are ~~probabl~~y not a sufficient address) we do not really know who this needs to be addressed to. ~~to this~~ *may decide to*

4.   There appears to be a misunderstanding concerning the suggestion that when commissions begin to work they undertake -- as part of the~~ir~~ ongoing self-study of their community's educational system -- an in-depth detailed and comprehensive survey of educators. This is not an instrument to build the wall-to-wall coalition (by which we mean the broad representation on the local commission of all interest groups related to education), but rather a scientific endeavor, to which the communities seem to be very sympathetic, that has to be carefully thought through, planned, commissioned, and carried out through the appropriate commission and sub-committee process. Again, this too is contingent upon an active commission starting to work.

5.   Barry ~~Reis~~ *Holt* will be in Milwaukee on ~~January~~ 16th to begin a series of discussions and consultations on pilot projects -- as you know it is not the lack of needed projects or knowledge of how to do that is hampering advance here but rather the community mobilization process which, as clearly indicated here, seems to lag behind planning.

incomplete ~~The credibility issue does not appear to be XXXXXXX~~

As you know, we will be in the United States towards the end of February/early March and will convene then a meeting of the planners at which hopefully all these matters will be discussed.

However, if in the meanwhile the fact that materials will be available by early February -- despite there being no commissions yet in any of the communities -- Milwaukee, which is the more advanced community, has a steering committee that will appoint the commission) in place. If that fact will help credibility, then we are pleased to make sure that they will be in hand.

Sincerely,

Faxed Memorandum:

To: Shulamith Elster

From: Shmuel Wygoda

Date: January 7th 1993

As promised here is our second fax with more answers and some additional issues.

1) Lead Communities at Work:

This document was good for August 1992. Since then however, many things happened in the CIJE and in the lead communities, so that the entire document would have at this point to be revamped in order to adequatly present today's issues. Hence we don't suggest you use this document to give out to the Senior Advisors.

2) JESNA

Thank you for the copy of the memo you sent to Jo Ann Mort Koschak

In that respect we have no idea as to the content of the initiatives mentioned in that memo. Are they local organizational efforts or programmatic efforts?

In any case should you want to prepare such a list, we suggest the following sequence:
a) An internal list for CIJE staff and consultants only.
b) The setting of clear criteria for selecting of the most appropriate initiatives.

3) Meetings.

Could you kindly fax me the list of CIJE related meetings you will be having, so that we can use its input

Best regards to Barry. I hope today's meeting will be most productive

שבת שלום

MEMORANDUM

TO: SHMUEL

FROM: ANNETTE

DATE: JANUARY 6, 1992

Hello Shmuel,

I'll try to respond to Shulamith's memo received this morning and to the 4 items she expects of us.

1.   As regards Claire's services, it was completely clear following discussion that the field researchers would **NOT** undertake this sort of research. Insofar as data will be available, we will of course give it to communities. However our research has a qualitative focus that does not involve the items mentioned. Moreover (and I don't know how to tell this to Shulamith effectively) I believe this is a continuation of Gelfand's fairly unproductive testing of the CIJE. . . . We should not tell this to Shulamith -- therefore we should only indicate that Claire cannot do what they are asking -- it's just not her job.

As to Sara Lee's request, if you have an opportunity to touch base with Seymour and get from him an indication on how to ensure that we do the main work with Shulamith being in there as coordinator or facilitator only -- that would be great. Perhaps you can take him aside for a minute at 1:00.

I think as regards the Gamoran paper, I don't have with me "a three year outline." If you find it, please have it faxed to me immediately and I'll take a position -- maybe bring up at lunch time if appropriate Ellen's presentation to the senior policy advisors group. To Shulamith you should say whatever we decide later today about the paper and that we think it is great that Ellen and/or Roberta should attend the meeting. I suggest she does not include "Lead Communities at Work." The memorandum on the planners workshop is good enough and very accessible. I suggest the following the corrections which I think we should tell her to do, rather than ask her for her opinion:

Page 3, b(6) -- Draft a five-year plan. (Delete the rest of the sentence).

Page 5, on the sentence at the top, add in parenthesis "refer to Gamoran's paper."

Page 5, V(a) -- delete the details to numbers 1-5; just leave the name of the area (1. The supplementary school; 2. Early childhood Jewish education).

1

Page 6, VI(a) -- delete the first sentence. Start at "It is anticipated."

Delete the whole of page 7.

Page 8, delete from fourth paragraph ("to help the communities") to end of paper, leaving the conclusion if Shulamith wants.

Homework done.

Shmuel, if you would like to write to Shulamith saying this is the first installment of responses and include the reactions to the materials -- saying that we think the edited version is very good and telling her "NO" about Claire and "NO" about "Lead Communities at Work" and that we will be back to her with the rest tomorrow.

Oops -- last minute thoughts: have a look -- maybe her suggestions on "Lead Communities at Work" are great.

Thank you very much for your reading, your time, your attention and remember that we were told to be inefficient until we know more. So please have the right feelings: inefficient is great, is what we want, is our trademark for yesterday.

Sincerely,

Annette

Mandel Institute

מכון מַנדֶל

Tel.   972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To:	Mr. Morton L. Mandel	Date:	January 3, 1992
From:	Annette Hochstein & Seymour Fox	No. Pages:	4
Fax Number:			

Please deliver to Mr. Mandel at 8:00 A.M.

3 JANUARY 1993

To: MLM

From: AH and SF

Re: Transition strategy for the CIJE

The following is the summary of our current thoughts and suggested strategy for the CIJE. Following our discussion later today, we will draft a more complete document.

1. Purpose

To offer a strategy for placing the implementation of the Commission's decisions on an effective and positive course. To resolve current issues of leadership. image, cost, content and staff assignments.

2. What is involved:

a. Re-organize the CIJE. its leadership and structure, the roles and functions of its staff and consultants.

b. Design an immediate short-term communications and action plan to improve perceptions, halt ineffective or negative messages, set work with communities on a positive footing.

c. Re-design a strategy and workplan for the Lead Communities project, and for the overall CIJE assignment.

Our main topic here are the re-organization and short term plans.

3. Several alternatives were considered

a. Undertake a search for the ideal CIJE head.
This may be a longer-term option, but will not solve the short or medium term assignments. Should be reconsidered at a later stage.

b. Appoint S.Elster acting director. This would revert to last year's situation, with its shortcomings.

c. Revert to the Commission structure: This alternative is offered for immediate consideration -- and is the subject of the balance of this memo.

4. Details :

a. Headquarters in Cleveland

b. HLZ director

c. VFL administrative head, in charge of facilitation, coordination, and monitoring of implementation

d. Active Senior Policy Advisors' group (e.g. S.Hoffman, M.Gurvis, J.Elkin, S.Lee, (add 2 more eds) J.Woocher, S.Horowitz, A.Rotman, A.Schiff)

e. Mandel Institute key staffing role: we will undertake any assignment. This probably will include ongoing advise to CIJE Chairman and Director; in charge of strategy, plans, ongoing staff training and guidance; ongoing development of content.

Additional staff:

f. Holtz heads educational efforts with the communities: best practices; pilot projects; guidance to communities for all educational implementation

g. Gamoran and team Monitoring, evaluation and feedback project: active ongoing input into decisions and plans.

h. Elster key contact with communities; assistance to Holtz and all projects; facilitator of contacts with Rabbis and Educators.

i. Ukeles preparation of planning materials (if retained).

j. Providers of educational services: denominations; JESNA; JCCA; others: within the framework of overall plans and strategy: provide expertise and programs directly to communities (e.g. in-service training; articulation of vision and goals)

Under this scenario the CIJE would benefit from HLZ's experience, credibility and leadership in the community world. He would guide the effort with Lay leadership and professionals. VFL would ensure effective administration of implementation and harmonious relationships. The Mandel Institute would work as during the Commission: as management team with MLM and HLZ; responsible for content with Holtz (responsible for educational content; the best practices project; pilot projects); with Gamoran (evaluation project); with Elster (link with communities; coordination and assistance to Holtz, Gamoran, etc.; support to their projects); with Ukeles (planning guidance -- if anything); with providers of educational services (denominational; other). A solid Senior Policy group would serve as effective consultants.

5. Suggested Action Plan:

a. Short Term Targets

1. Bolster confidence in the CIJE, halt mixed messages that are being sent forth to communities and constituencies.

2. Halt the dual trend affecting the content of work with communities: the one is "business as usual" with marginal change aspirations; the other. in the spirit of the Commission's work, has aspirations to long-term, profound change. and demands of communities that they re-consider priorities, leadership roles and commitments.

3. In order to ensure unity of purpose and the effective use of resources, prepare a coherent, consistent and explicit strategy and workplan for the Lead Communities.

b. First steps:

1. Decision to move ahead
2. Get HLZ on board
3. Message to current leadership and staff + negotiations for change
4. Message to community planners and other relevant actors in the communities
5. Message to CIJE board
6. Staff and planners' seminar
7. Set stage for assessment of each community
8. Visit communities -- do interviews and analyses
9. Plan next phase

c. Issues

1. What is the message to staff and to planners?

2. What happens in the interim: AR; Elster and Holtz; communities (business as usual may not work or may work only with some.)

3. How do we get everyone on board?

4. What if this plan does not work out?

3

December 25th 1952

Draft [illegible] for Annette.
We will collect and [illegible].

January 5th 53. This [illegible] was [illegible] and
It was decided to try and [illegible]
a [illegible] of who is [illegible] now, and [illegible]
[illegible] key players in the L.C.

Dear Shulamith,

Thank you for your last faxes which reached us in the midst
of the Mandel Institute Board meeting.

I realise this is your last day at the office before your
break, and that is why I would like to focus on what seems to
me the most urgent issue at the present time, the one of the
Local Commissions.

As the three L.C. are having their Local Commissions started,
we would like to know who are the people on those commissions
in terms of Lay Leaders, Educators, Rabbis, and
Professionals.
Secondly, could you map out who in these three L.C. are the
top figures in the categories mentionned above.
Thirdly, are these key figures on each of the Local
Commissions, and if not what would it take to have them on
board.

This information is quite important if we want the local
commissions to be effective in the context of the entire
project.

By January 4th you should have on your desk our responses to
all the other items you have raised in your last faxes.

Have a great vacation, and a חנוכה שמח .

Annette.

MEMORANDUM

TO: SF & SW

FROM: AH

DATE: DECEMBER 15, 1992

Re: Conversation with Marshall Levin

I had a conversation with Marshall Levin last night, the first of what I believe will become a series.

We discussed the following:

1.   A formal consulting relationship -- something I promised to get back to him about immediately following our board meetings, if not before.

He very much wants to be involved at the heart of our efforts.

2.   He told me that he is "very concerned about the conceptual dissonance between the planners in lead communities and the planners at the CIJE; the lay leaders in lead communities and the lay leaders in the CIJE (he may have meant lay leaders versus planners). He believes this dissonance needs to be quickly addressed and he explained it as follows:

a.   The field researchers are interviewing right now and asking questions of people who have no idea of either the CIJE or the lead communities. As a result, JCC heads and other executives or educators call Marshall and say: what are these people who came to interview me; are they going to write a book about us?; are they bringing resources for the community? Marshall then goes on to explaining what this is about. However, there is a total gap between what the field researchers are doing on our orders and what is in fact happening in the community.

b.   The planners of the lead communities left the meeting feeling that Barry has no answers about how to do best practices into a community. "Do you know what Barry answered us when we asked: `How do you want people to use the best practices?'? He said: I don't know."!!

c.   At the same time, Marshall points to his own understanding that the thinking is probably there at the macro level; however that it needs to be put into a form that is both understandable and usable in communities. He also believes that he would be able to help us, in his words: "link the conceptual with the concrete" and that he would love to be the person to in fact do that.

1

3.   He thinks that we need an intensive period of joint work to address the next thinking steps and think them through and come up with a program -- something which he will be very happy to be central to.

4.   Marshall I believe is very enthused by the lead communities idea. He tells me what a good idea it is, however he also says that the partnership has not been fleshed out between the communities and the CIJE and that this is creating at the present time a series of expectations that we are obviously not meeting. In his own perceptions, we have been thinking for 5 years and may be don't know what is going on in the trenches.

We spoke some more about the expectations that might be created, e.g., in formation such as best practices that will be usable right away; expectation of financial resources; at the same time some suspicion that well-intentioned lay leaders may have this very gradiose idea, but that not much will come of it.

We agreed that I would call him, if possible, within the next few days -- sometime around 6:30 or 7:00 his a.m. time at home.

Memorandum.

To: ~~Annette~~ Shmuel / Annette

From: ~~Shmuel~~

Re: CIJE last faxes

Date: December 14th 1992

a) Art Rotman.

I don't believe he did —

1) Re Jesselson.
Did Seymour plan to discuss the matter with Danny Tropar. If yes did he already speak with him?

I sent a Fax on Monday with the

2) Art's Israel visit schedule.
I am not clear as to how should you respond to this memo. In any case don't forget to send a copy of your response to Don Scher. *sch will send an invitation to have lunch with me on Tuesday.*

3) Art's memo to the participants in the Lead Communities Planners Workshop.

I believe it is a proposal error

I) #4 Although it would be nice if the three communities could come up with the same pilot project, given the differences between them in terms of readiness, it is not obvious that this goal is attainable. If it can't be , at least each community should have one pilot project that could enthuse the entire community, and mainly show what is the scope of the entire L.C. project.

II) #4 The meeting of a CIJE board member with the local lay leadership is a prerequisit to the entire project. Failing to having such a meeting might jeopardise the entire process in the long run.

III) #7   I am not clear as to what is the exact purpose of this list.

4) We ought to get from Art a first report on his visit to Baltimore in order to see how things went , and whether there are any "(pots cassés ") *My conversation with Marshall Perin — ... I dedicated a memo. We MUST have a January seminar!*

b) Shulamit.

I) Memo to Art and you re December Workplan.

As we talked I think that it is by and large OK.   I am going to prepare a answering document on each of the 10 points of this agenda. *YOFFI!*

II) Was she told that next Tuesday telecon was advanced by half an hour to 17° *yes Will you be in on it ? I think that might be very good. I spoke with her on Thursday as I told you*

As soon as a first draft of my document will be ready, I'll try to set an appoitment with you in order to discuss it and at the same time to prepare the telecon.

כל טוב

שמואל

Thanks!

gent!

Mr. Arthur Rotman   December 10, 1992

Annette Hochstein

Dear Art,

                    RE: Letter of Understanding

I am responding to the draft of the letters of understanding for
Atlanta, Baltimore, and Milwaukee as forwarded to me by Jack on
the 2nd of December -- these differ from the earlier versions I
had.

As discussed at our meeting of November 23rd with MLM, theletters
do not represent the joint understanding that would result from a
mutually agreed design of the project. Rather, they represent the
communities' understanding of the project at this time (see in
particular the preambles to the letter referring to the CIJE as
aassisting them in their current plans).

While it would perhaps be preferrable to go to work without this
written agreement, it may not be possible to do so. Therefore, it
was decided to include a specific clause limiting the agreement
to one year. This is in order to allow us to negotiate the "real"
agreement during the current year as the elements of the
projects, the resources required and the contributions of the
CIJE and of the community become specific and clear.

The current letter is also problematic on the following particu-
lars:

1.   The total amount of money a community will commit;
2.   The need to hire special staff for the project; and
3.   The definition of the current year as a planning year --
while both parties would want it also to be an action year (e.g.,
pilot projects).

I hope these notes are useful towards your meetings in the commu-
nities -- any progress from the current version would be great.
You will certainly find out whether and how it is possible to
progress from the current version. Do we want to consult further
with MLM on this at our forthcoming meeting?

Best regards,

Mandel Institute

מכון מֶנדֶל

Facsimile Transmission

To: _____ Mr. Arthur Rotman _____   Date: _____ December 7, 1992 _____

From: _____ Annette Hochstein _____   No. Pages: _____ 5 _____

Fax Number: _____

Dear Art,

Enclosed is a memo towards your visit to the communities. It might be effective to look at this in conjunction with a copy of my slides, the September memos on the workplan and on "Lead Communities At Work," and, of course, "A Time to Act."

Hope this is helpful and am of course available for any further details or clarifications.

Best regards,

Annette

For the Advanced Study and Development of Jewish Education

December 7, 1992

Mr. Arthur Rotman

Dear Art,

Re: Your Visit to the 3 Lead Communities

December 1992

In our conversation in New York last week, we agreed that it
would be important for you to visit each of the lead communities
at the earliest possible time, in order to discuss next steps
with community leadership (both lay and professional) and to get
actual work underway in each community.

I cannot tell you how pleased I was to learn that you have in
fact found the time to go to the communities this week and next -
- I believe your visit will be of significant benefit to the
process and the project. The following notes may be useful for
your visit.

A.   DESIRED OUTCOMES

Optimally, your trip would have the following outcomes:

1.   You would help lay and professional leadership identify next
steps in the process. This would result in full-scale operation
of the local commission (e.g., preparation of the 5-year plan;
decision on an action plan for the current year including pilot
projects). It would also pave the way for Barry and Shulamith to
begin work with the educators and the rabbis (e.g., the best
practices project for supplementary school teachers) and allow
the field researchers to carry on with their work (the feedback
to communities). In other words, the CIJE could then make its
full contribution to the community (see details below).

2.   An early step might be the proposed meeting between key CIJE
board members and top local leadership to discuss the project,
the role of the lead communities and of the CIJE, leadership

1

mobilization for the local commission, funding, staffing, etc.

3.   Negotiate further <u>the letter of understanding</u> (separate memo forthcoming).

4.   Get the planners further on board. We need to find a way for the planners to encourage the actual intensive launch to take place, even before special staff is hired -- or to hire immediately staff that could dedicate all their time to the project.

5.   Further the joint agreement and understanding as to the following steps in the process:

a.   Staff the project locally with paid, dedicated staff -- planner or educational planner -- at least half-time, but preferably full-time.

b.   Set up the local commission and if it already exists, ascertain the calibre of leadership.

c.   Review the commission's assignments:

1.   Prepare an action plan for the current year that would include pilot projects in the areas of personnel and community leadership (these would be defined and designed with Barry Holtz, but might include, for example, a summer leadership seminar in the U.S. or in Israel; an in-service training program for principals and directors of educational institutions; a leadership training program for members of school boards).

2.   Begin addressing the content and its application in specific settings: introduction of the best practices project -- beginning with supplementary schools and early childhood programs (Barry Holtz).

3.   Prepare a 5-year plan for dealing with the enabling options and with the Israel Experience (see <u>A Time to Act</u>).

4.   Assessment of the community's Jewish educational system -- its resources, strengths, weaknesses. Begin perhaps with a survey of the educators (their qualifications, numbers, scope of positions, training needs) ... Guides are forthcoming for the 5-year plan and the assessment of the community's educational system. (Ukeles and Meier.)

6.   <u>In sum,</u> your meetings might include the following items:

a.   Getting the leadership further onboard, comfortable with the recommended process (see "c." above) -- the current year being a planning year and a year for pilot projects; joint design of the lead communities project by the CIJE and the communities through

2

an ongoing planning effort throughout the year. A desired outcome of your visit would be the possibility for local and CIJE staff to systematically introduce the idea of lead communities to the various actors in the community.

b.   The content: preparation of a 5-year plan that focuses on dealing with the shortage of qualified personnel (e.g., strengthen in-service training opportunities; new hires) and on community mobilization for Jewish education. This would include:

   1.   Pilot projects for immediate, or early, implementation.

   2.   Introduction of the best practices project to the educators, rabbis and to leaders in the community.

   3.   Discussion of the vision and goals for Jewish education at several levels in the community.

   4.   Monitoring and evaluation with the purpose of giving feedback to the community and the CIJE as to how work is progressing and what the impact of the effort is.

                    * * * * * * *

B.   BACKGROUND NOTES:

1.   Since selection of the communities, the contacts with the CIJE have dealt with the following: the letter of understanding, the field workers (monitoring, evaluation, feedback loop), the November Planners' Workshop in New York, selected contacts with local organizations. These contacts have involved Shulamith Elster and Jack Ukeles in 1-3 meetings in the communities plus a large number of telephone contacts and of course they have involved you in many contacts.

2.   Important beginnings have taken place. We now want to move towards an action plan for the current year.

3.   In each community one or more federation planners have been appointed to be currently the key local professionals for the lead communities project. They do this in addition to their normal workload, and until paid staff is hired. This places a limit on the amount of work that can be done at the present time.

4.   In each community, a lay person has taken the leadership position, to be the Chair of the Lead Community Committee or Commission. The calibre of leadership needs to be ascertained (are these the "champions" that will give leadership and resources to the project?).

3

5.   In each community there is a commission or committee, completed or in formation. It was not clear how effectively this group has been convened at the present time.

6.   Leadership mobilization: lay, professional, educational and rabbinic leadership needs to be brought on board. It is not clear at the present time what the needs of each of these groups is and we ought to devise ways of finding out. Key CIJE leadership, such as MLM or CRB, might help in finding this out for lay leadership.

First steps have already been taken as regards federation planners, local leaders who are CIJE board members, and additional individuals.

* * * * * * *

It is clear that there have been good beginnings and that certain people have been informed of the project. Our challenge now is to find the appropriate venues to discuss with the communities what the project entails, why it holds the great hopes it does, and how we will jointly move ahead with it.

TO: SHMUEL WYGODA

FROM: ANNETTE

DATE: DECEMBER 6, 1992

RE: NEXT STEPS AND ASSIGNMENTS

I suggest that each of us prepares a list and memo of the next steps and assignments, made as exhaustively as possible, and then we will meet and rank them. I think we should try to meet today -- 2:00 p.m. would be a good time for me if you are ready. In the meanwhile, I have already sent over to you a number of things that have occurred since we last spoke or met. It is important that we keep up the contact with all the players, both at the CIJE, Barry, Adam, Shulamith, Art -- in the reverse order of course -- and Jack and in the lead communities themselves. We should decide what it is we will want to say -- any opinion on that is most welcome.

I am writing the following 2 documents to Art Rotman:

1.   A memo concerning his visit to the 3 lead communities which I hope will take place this and next week.

2.   I have with me a fax on the letters of agreement. Please look at them; I believe I must write a memo about what needs to be done differently with them, if anything.

On follow-up and follow through, the following is a prelimimary list:

1.   Barry needs to send a description of best practices to the communities -- he is asking for 6 weeks on that. I don't know if 6 weeks isn't too long.

2.   Barry has to prepare pilot project proposals following his discussions with us and with Seymour on that.

3.   We ought to decide whether for the contact with the communities we need a point person for each (a person from the CIJE) and a person in each community that is a local person.

4.   On the goals project, we need to have Danny and yourself prepare proposals for both Shulamith and the communities.

5.   Contact with Shulamith has to be constant and ongoing: you must know what she does and give her constant guidance on the substance of it.

1

I must find a way of communicating with Adam Gamoran about what has happened because I imagine that there will be a rather distorted picture emerging from the field researchers.

See the current version of the letter of understanding as negotiated by Ukeles last Tuesday and Wednesday. Please compare it with the original text and let's discuss it later today whether we have a problem, should go with the letters as they are, or should in fact negotiate further.

Art Rotman   November 4, 1992

Annette Hochstein

Dear Art,

Thanks for the confirmation of the staff seminar of November 19
and 20. We here have been working harc at trying to establish
what a first year workplan for lead communities might entail, and
therefore what the agenda of the staff meeting might include.
Here is where we come out:

The first year of work with lead communities includes the
following elements: the concept of lead community, the idea both
in its detail and in its concept which says that the whole is
greater than its parts, needs to be introduced thoughtfully to
various populations in each lead community (educators, rabbis,
lay people, professionals and planners in the community). One of
our assignments at the staff meeting would be to discuss how this
is going to happen. It would be wonderful if we could, at the end
of the meeting, agree on what needs to happen with each of these
population groups and how we would do this (individual meetings,
meetings by groups in the lead communities, meetings of all
groups at a joint seminar convened by the CIJE, etc.).

The second element is the planning assignment which includes the
need for the community to study its own educational system, its
strengths, weaknesses and needs. For that to happen, the staff
must be in a position to offer guidelines and guidance, including
on such items as how to conduct an assessment of the educators in
the community, whether to introduce achievement tests or not,
what sort of inventory of educational opportunities we need and
to what level of detail, data on attendance, etc.

6

The second element is a five-year plan that would be the result of the work of the local mechanism -- the wall-to-wall coalition in whatever local form it takes place, and would at the end of the year be the result of the joint seminar and the local work together. This would include implementation of the whole plan.

The next element is the workplan for the current year which would include, among others, the implementation of probably several projects, suggested by the CIJE, in the areas of personnel training and community mobilization (e.g., in-service training seminar at each of the training institutions; program for all day school principals; program for all supplementary school principals; training program for all school board members; etc.).

We are suggesting that if we complete the staff seminar with a better understanding of both these items and how we are supposed to introduce them and bring them about in the lead communities, we will have advanced the project significantly. I would love to discuss this with you whenever convenient on the phone.

Best regards,

Annette Hochstein

LEAD COMMUNITIES
A PARTIAL SCENARIO

TASK NAME	1992		1993														1994	
	Nov	D	J	F	M	A	M	J	J	A	S	O	Nov	D	J	F
4-6 PILOT PROJECTS				▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓												
LOCAL CIJE			▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓													
EDUCATORS' SURVEY					▓▓▓▓▓▓											
BEST PRACTICES			▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓													
MONITORING, EVALUATION, FEEDBACK		▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓														
5-YEAR PLAN			▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓													
COMMUNICATIONS, NETWORKING		▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓▓														

LEAD COMMUNITIES—A PARTIAL SCENARIO

	1992												1993			199	
	Nov	D	J	F	M	A	M	J	J	A	S	O	Nov	D	J	

4-6 PILOT PROJECTS

PERSONNEL—IN SERVICE

Principals & JCC Execs

2 Teachers & Informal Eds from each Institution

1 New Hire

Israel Summer Seminar

Networking the 3 Communities

COMMUNITY MOBILIZATION

National Leaders Mobilize Local Leaders

Leadership Training

CLAL Program for all Boards

Denominational Leadership Training

Public Sessions on Vision & Best Practices
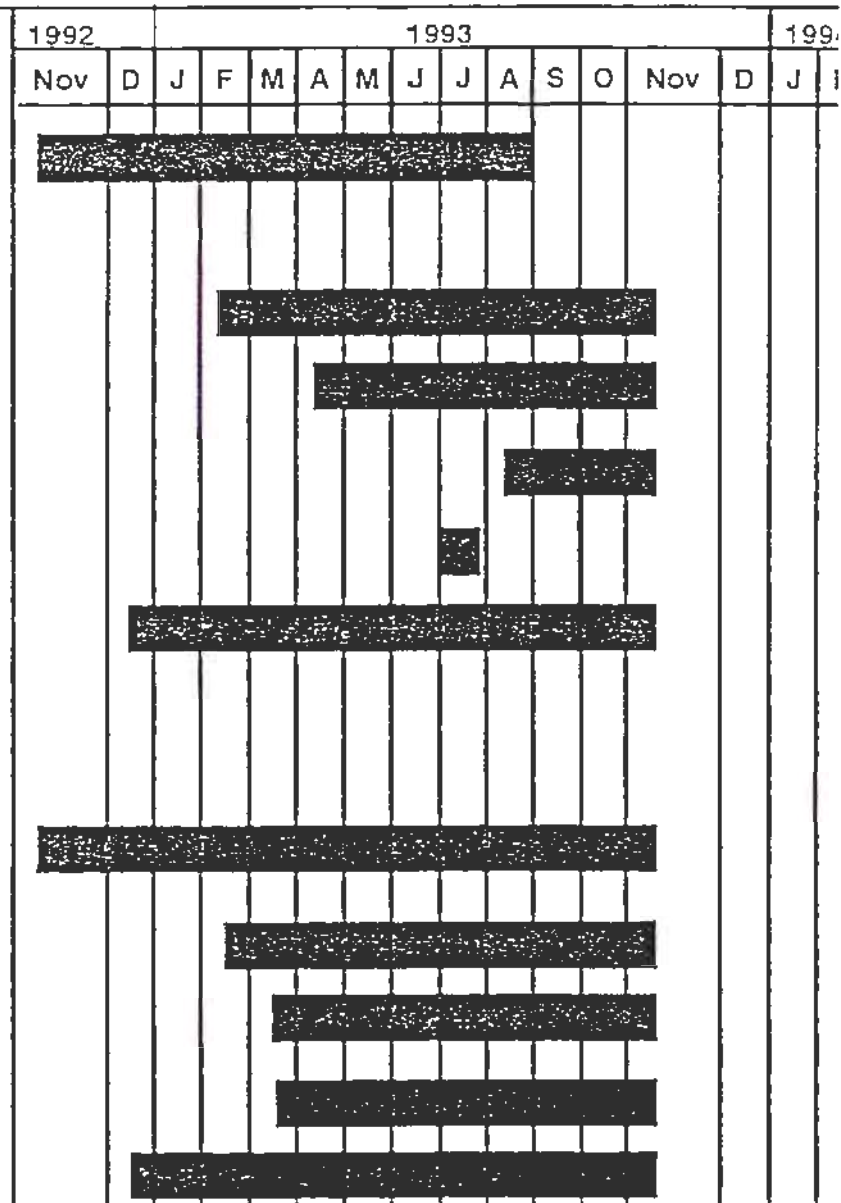
LEAD COMMUNITIES—A PARTIAL SCENARIO

	1992									1993					1994	
	Nov	D	J	F	M	A	M	J	J	A	S	O	Nov	D	J	F

LOCAL CIJE

FORMED (AND IN FORMATION)

REPRESENTATIVE
- Champion
- Lay Leaders
- Educators
- Rabbis
- Professionals

STAFFED

TASKFORCES
- In-Service Training
- Planning & Self-Assessment
- The Lives of Educators
- Monitoring & Evaluation
- Visits to Israel

PRODUCTS (EXAMPLES)
- Educators' Survey
- 5-Year Plan (Rosh Hashana or G.A.)
- Pilot Projects

LEAD COMMUNITIES—A PARTIAL SCENARIO

EDUCATORS' SURVEY

	1992		1993													1994	
	Nov	D	J	F	M	A	M	J	J	A	S	O	Nov	D	J	F

PLAN

REPRESENTATIVE TASKFORCE

STAFF (LOCAL UNIVERSITY?)

MOBILIZE & INVOLVE EDUCATORS

DESIGN

CARRY OUT

ANALYZE

REPORT & DISCUSS FINDINGS

LEAD COMMUNITIES—A PARTIAL SCENARIO

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	1992				1993											1994		
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LEAD COMMUNITIES—A PARTIAL SCENARIO

	1992								1993								199
	Nov	D	J	F	M	A	M	J	J	A	S	O	Nov	D	J
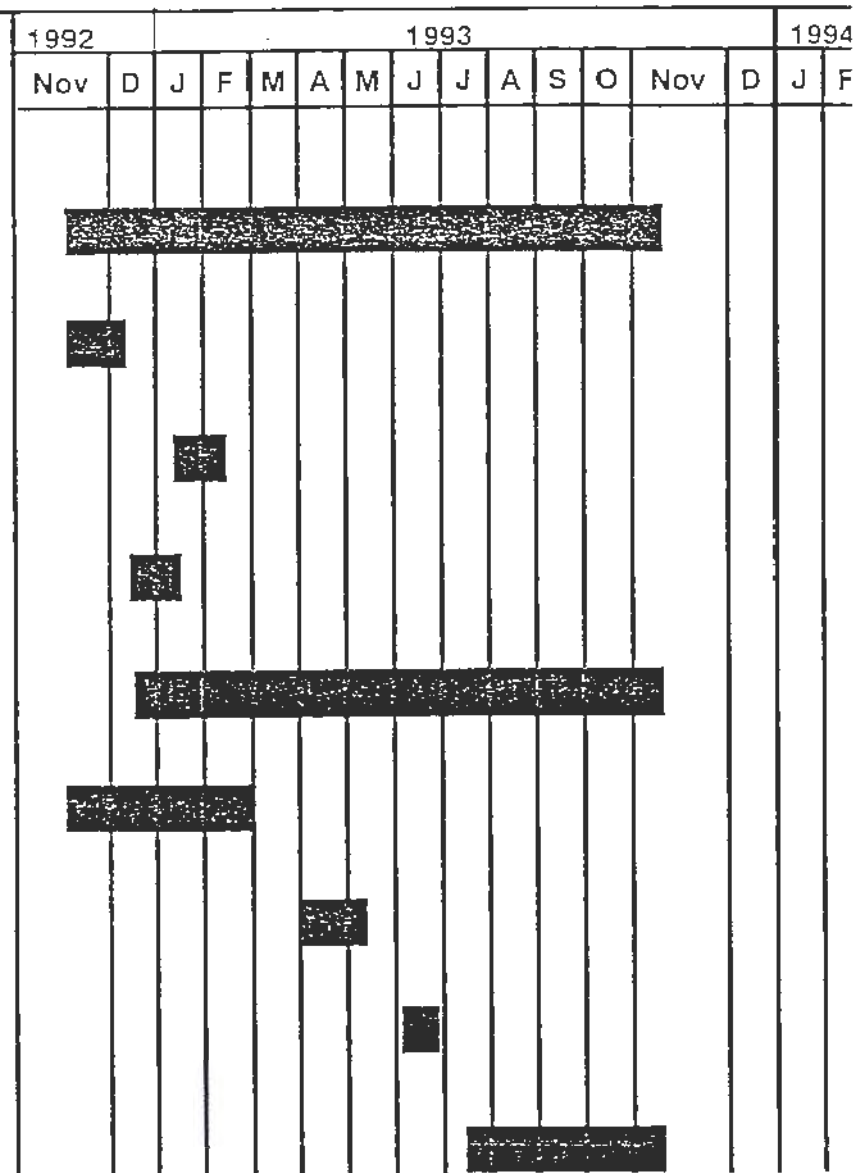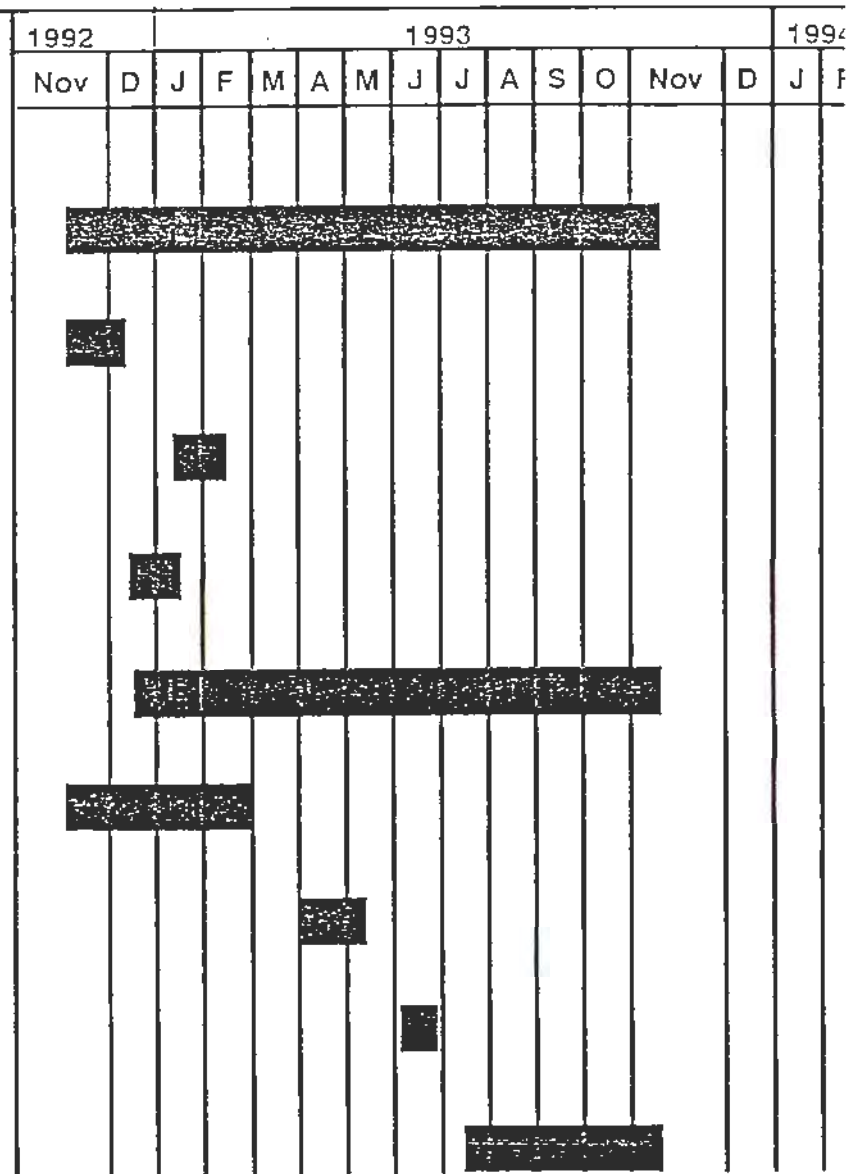
BEST PRACTICES

IMPLEMENTATION PLANNED
  Develop Method for Training

  Develop Translation Method

6 AREAS COMPLETED

PROJECT PRESENTED

FIRST 2 AREAS SELECTED

CONSULTANTS SELECTED & TRAINED

WORK WITH SUPPLEMENTARY SCHOOL
PRINCIPALS
  Joint Planning of Implementation

NETWORK WITH EARLY CHILDHOOD TEACHERS
  Joint Planning of Implementation

PLAN ROUND 2 OF PROJECT

LEAD COMMUNITIES—A PARTIAL SCENARIO

	1992													1994	
									1993						
	Nov	D	J	F	M	A	M	J	J	A	S	O	Nov	D	J	F
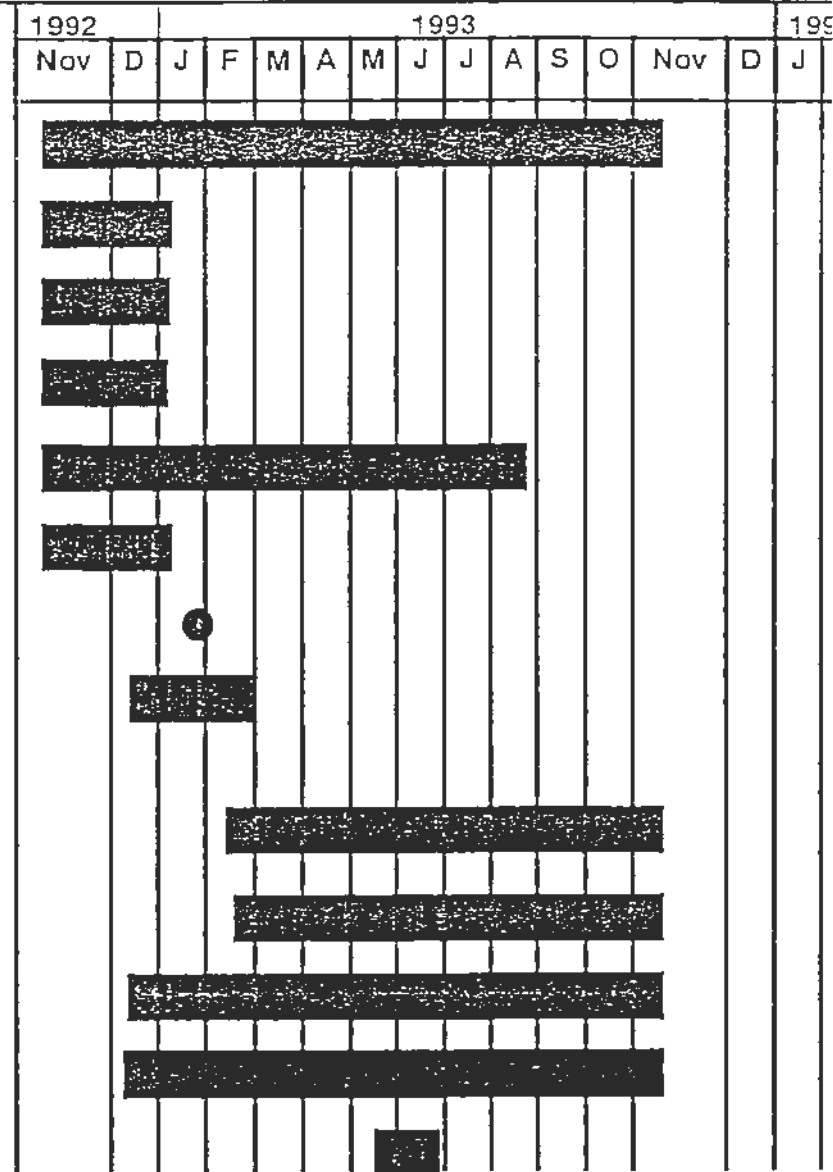
MONITORING, EVALUATION, FEEDBACK

DESIGN FEEDBACK LOOP

ONGOING WORK

3 REPORTS

LEAD COMMUNITIES—A PARTIAL SCENARIO

	1992		1993												1994	
	Nov	D	J	F	M	A	M	J	J	A	S	O	Nov	D	J	F

5-YEAR PLAN (SEE SEPARATE)

ASSESSMENT OF EDUCATIONAL SYSTEM
  Prepare Detailed Guide

  Profile

  Inventory

  Educators' Survey

  Achievement Measures

  Clients' Survey

  Etc.

THE PLAN—ROUND 1
  Prepare Detailed Guide

  Staff

  Taskforce Set-Up

  Give Assistance as Needed

  Etc.

LEAD COMMUNITIES—A PARTIAL SCENARIO

	1992		1993												1994
	Nov	D	J	F	M	A	M	J	J	A	S	O	Nov	D	J
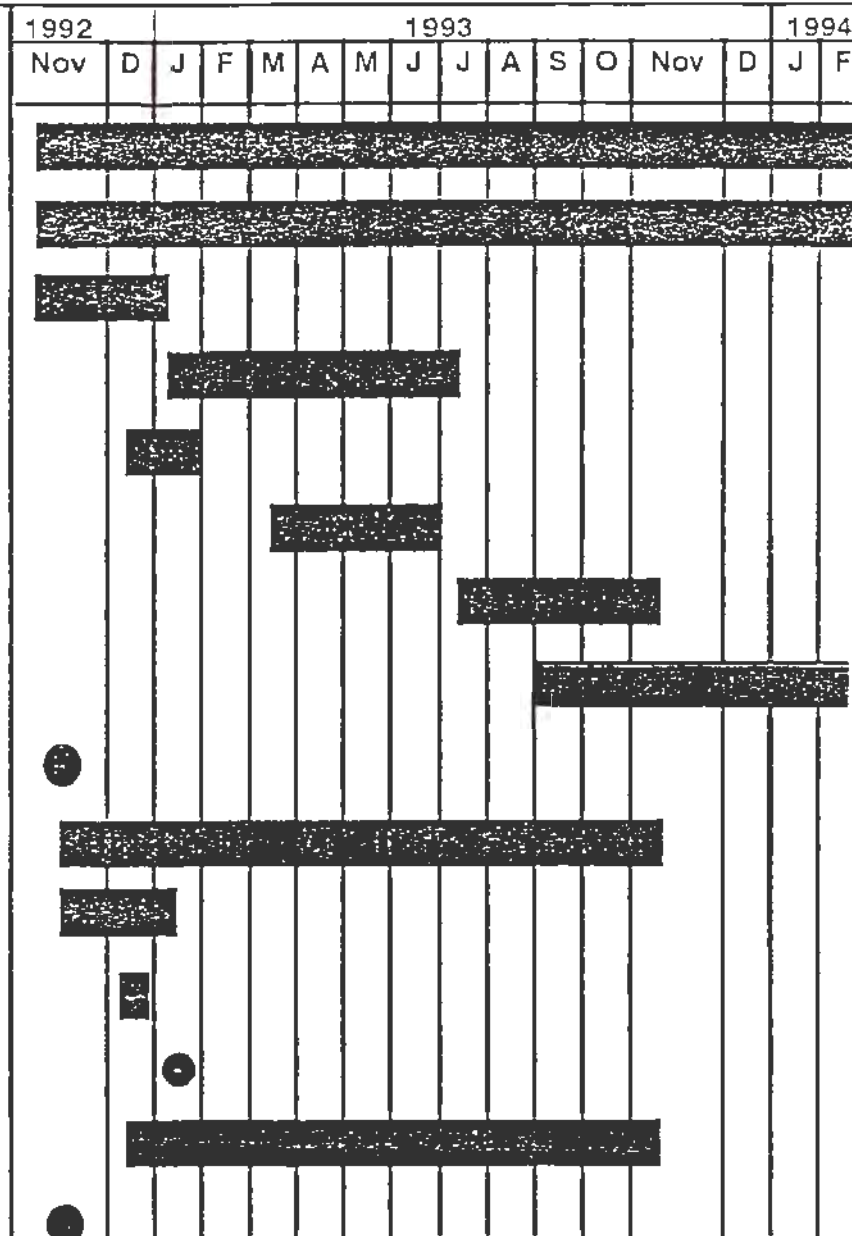
COMMUNICATIONS, NETWORKING

PLAN — STAFF — CARRY OUT

CIJE TO CONTINENTAL COMMUNITY
  Momentum Maintained

CIJE TO LEAD COMMUNITIES
  All Constituencies Know

LEAD COMMUNITIES TO EACH OTHER
  Shared Learning

LEAD COMMUNITIES TO COMMUNITY-AT-LARGE
(23)

IMPLEMENTATION OF THE RECOMMENDATIONS

BUILDING THE PROFESSION

In-service training launched
Educators' survey completed — taskforces
   dealing with implications
Best practices
Networking—various
2 new hires
1 new position
Educators participation

COMMUNITY MOBILIZATION

Champion recruited
Leadership training
New leaders
Goals discussed
Educators discussed
Networking with cije leaders
Networking between communities

ISRAEL AS A RESOURCE

Plans for "every youth"
Educators summer seminar

RESEARCH

Monitoring, evaluation, feedback
DAta base—assessment

THE CIJE'S ROLES

RESOURCE COORDINATION

Partners: JESNA, JCCA, CJF
Purveyors: Training Institutions,
   CLAL, CAJE
Foundations: CRB, MAF, Blaustein

ENGAGEMENT & PARTICIPATION

Local Committee
Actors Within Community

COMMUNICATIONS & DISSEMINATION

Innovations &
   Improvements
Best Practices

LEAD COMMUNITY

FUNDING FACILITATION

Links to Foundations &
Organizations

CONTENT & QUALITY

Experts/Consultants
Best Practices
Monitoring,
   Evaluation,
   Feedback/Loop

PLANNING ASSISTANCE

Self-Study
Programs
5-Year Plan

LEAD COMMUNITY

IMPLEMENTS

Initiates
Coordinates
Facilitates

DEVELOPS RESOURCES

Human
Financial
Leadership

MONITORS

Implementation

LOCAL COMMITTEE

CIJE

CONVENES & ENGAGES

All Actors
Lay Leaders
Educators
Rabbis
Professionals
Institutions

PLANS

Self-Study
Programs
5-Year Plan
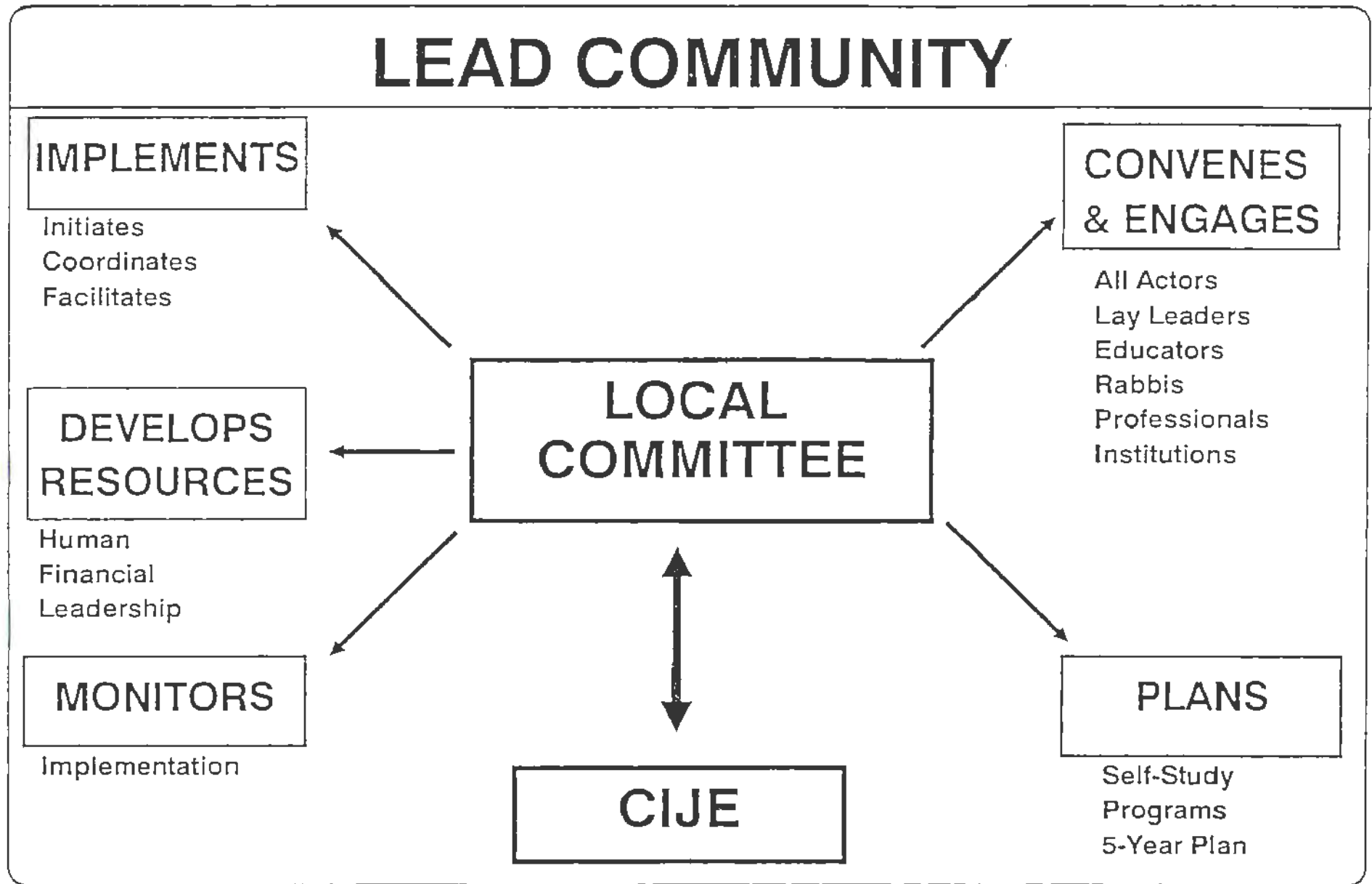
THE CIJE -- PRELIMINARY WORKPLAN

1992/1993

A.   Function, structure and staffing assumptions

The following assumptions guide this plan:

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

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

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

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

B.   Establishing Lead Communities

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

C. Elements of the workplan for Lead Communities

Immediate: Preparation, negotiations and launch

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

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

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

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

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

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

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

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

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

44

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

    c> Provide funding facilitation as required.

    d> Provide planning guidance for:
       1>   The self-study
       2>   The one-year plan
       3>   Pilot projects to be launched in year 1
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    g> Provide guidance for the development of vision, mission, goal-statements at institutional and community levels.

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

    i> Develop networking between communities

    j> Develop means of communications and p.r.

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

Ongoing Work -- general CIJE and related to Lead Communities

1)   Board Meetings (August and February), Executive group, Board Committees (Lead Communities, Monitoring/Evaluation, Best Practices) and camper assignments

2)   Senior Advisory group meetings or conference calls

3)   Monthly CIJE-Lead Communities planning seminar

4)   Fundraising

5)   Ongoing contacts with constituencies (organizations,purveyors of programs, foundations lay leaders, educators,rabbis)

6)   Staff meetings (for planning and discussion of educational content: twice a year

7) Guidance to key projects

8)   Networking with educators, organizations and institutions.

9)   Plan the second and third years of the project.

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

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

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

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

2.   Building the Profession of Jewish education

46

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

3.   Developing a Research capability

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

4.   Establishing Lead Communities
  (see above).

Fall Seminar -- Some Suggestions

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

The components might include:

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

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

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

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

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

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

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

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

c. Monitoring, Evaluation and Feedback :same

d. Planning :
-- self study
-- pilot projects
-- one year plan
-- five year plan

-- The ongoing CIJE seminar

5. networking among Lead Communities

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

48

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

7. Closing session and discussion of next steps

CIJE -- Workplan -- Draft

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

Milestone △   Summary ■

CIJE -- Workplan -- Draft

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

Milestone △   Summary ▄▄▄

To: Arthur Rotman   September 15, 1992

From: Annette Hochstein

Dear Art,

                    Re: CIJE - Workplan

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

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

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

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

Best Regards,

Annette

1

THE CIJE -- PRELIMINARY WORKPLAN

1992/1993

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

3.   Developing a Research capability

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

4.   Establishing Lead Communities
   (see above).

Fall Seminar -- Some Suggestions

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

The components might include:

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

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

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

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

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

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

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

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

    c. Monitoring, Evaluation and Feedback :same

    d. Planning :
        -- self study
        -- pilot projects
        -- one year plan
        -- five year plan

        -- The ongoing CIJE seminar

5. networking among Lead Communities

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

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

7. Closing session and discussion of next steps

CIJE -- Workplan -- Draft

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

Milestone △   Summary ▰▰

CIJE -- Workplan -- Draft

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

Gantt chart spanning 1992 (Sep–Dec) and 1993 (Jan–Nov/D)

Milestone △   Summary ▬▬

Appendix D

A = Cross communities — Educators

B = City — Rabbis

LEAD COMMUNITIES AT WORK

A. INTRODUCTION

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

1. Build the profession of Jewish education and thereby address the shortage of qualified personnel;

2. Mobilize community support to the cause of Jewish education;

3. Develop a research capability which will provide the knowledge needed to inform decisions and guide development. In Lead Communities this will be undertaken through the monitoring, evaluation and feedback project;

4. Establish an implementation mechanism at the local level, parallel to the Council for Initiatives in Jewish Education, to be a catalyst for the implementation of these recommendations;

5. The fifth recommendation is, of course, the lead community itself, to function as a local laboratory for Jewish education.

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

B. THE SCOPE OF THE PROJECT (A)

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

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

1

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

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

- Supplementary Schools
- Day Schools
(A) - JCCs
- Israel programs
- Early Childhood programs

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

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

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

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

(A) C.   VISION

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

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

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

1.   At the communal level the leadership will develop and artic-
ulate a notion of where it wants to be, what it wants to achieve.

2.   At the level of individual institutions or groups of insti-
tutions of similar views (e.g., all Reform schools), educators,
rabbis, lay leaders and parents will articulate the educational
goals.

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

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

D.   BUILDING THE PROFESSION OF JEWISH EDUCATION

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

1.   Hire 2-3 additional outstanding educators to bolster the
strength of educational practice in the community and to energize
thinking about the future.

2.   Create several new positions, as required, in order to meet
the challenges. For example: a director of teacher education or
curriculum development, or a director of Israel programming.

3.   Develop ongoing in-service education for most educators in
the community, by programmatic area or by subject matter (e.g.the
teaching of history in supplementary schools; adult education in
community centers).

4.   Invite training institutions and other national resources to
join in the effort, and invite them to undertake specific assign-
ments in lead communities. (E.g. Hebrew Union College might
assume responsibility for in-service education of all Reform
supplementary school staff. Yeshiva University would do so for
day-schools)

5.   Recruit highly motivated graduates of day schools who are
students at the universities in the Lead Community to commit
themselves to multi-year assignments as educators in supplemen-
tary schools and JCCs.

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

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

E.   DEVELOPING COMMUNITY SUPPORT

This will be undertaken as follows:

1.   Establishing a wall to wall coalition in each Lead Community, including the Federation, the congregations, day schools, JCCs, Hillel etc..

2.   Developing a special relationship to rabbis and synagogues.

3.   Identify a lay "Champion" who will recruit a leadership group that will drive the Lead community process.

4.   Increase local funding for Jewish education.

5.   Develop a vision for Jewish education in the community.

6.   Involve the professionals in a partnership to develop this vision and a plan for its implementation.

7.   Establish a local implementation mechanism with a professional head.

8.   Encourage an ongoing public discussion of and advocacy for Jewish education.

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

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

1.   *Best Practices*

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

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

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

It works in the following way:

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

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

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

2. Monitoring Evaluation Feedback

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

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

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

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

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

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

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

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

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

3.   *Professional services:*

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

a.   Educational consultants to help introduce best practices.

b.   Field researchers for monitoring, evaluation and feed-back.

6

c.   Planning assistance as required.

d.   Assistance in mobilizing the community.

4.   *Funding facilitation*

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

5.   *Links with purveyors or supporters of programs*

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

G.   LEAD COMMUNITES AT WORK

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

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

a.   It will convene all the actors;
b.   It will launch an ongoing planning process; and
c.   It will deal with content in the following manner.

1.   It will make sure that the content is articulated and is implemented.

2.   Together with the team of the Best Practices project and with the Chief Education Officer, it will integrate the various content and programmatic components into a whole. For example: it will integrate formal and informal programs.

It will see to it that in any given area (e.g., Israel experience) the vision piece, the goals, are articulated by the various actors and at the various levels:
--   by individual institutions
--   by the denominations
--   by the community as a whole.

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

E. LAUNCHING THE LEAD COMMUNITY -- YEAR ONE

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

1.   Negotiate an agreement with the CIJE including:

     a.   Detail of mutual obligations;

     b.   Process issues -- working relations within the community and between the community, the CIJE and other organizations

     c.   Funding issues;

     d.   Other.

     Establish a local planning group, with a professional staff and with wall-to-wall representation.

3.   Gearing-up activities, e.g., prepare a 1-year plan, undertake a self-study (see 6 below), prepare a 5-year plan.

4.   Locate and hire several outstanding educators from outside the community to begin work the following year (1993/94).

5.   Preliminary implementation of pilot projects that result from prior studies, interests, communal priorities.

6.   Undertake an educational self-study, as part of the planning activities:

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

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

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

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

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8

August 12, 1992

LEAD COMMUNITIES AT WORK

A. INTRODUCTION

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1. Build the profession of Jewish education and thereby address the shortage of qualified personnel;

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3. Develop a research capability which will provide the knowledge needed to inform decisions and guide development. In Lead Communities this will be undertaken through the monitoring, evaluation and feedback project;

4. Establish an implementation mechanism at the local level, parallel to the Council for Initiatives in Jewish Education, to be a catalyst for the implementation of these recommendations;

5. The fifth recommendation is, of course, the lead community itself, to function as a local laboratory for Jewish education.

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

B. THE SCOPE OF THE PROJECT

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

1

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

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

3. The Lead Community project will deal with the major educational areas — those in which **most people** are involved at some point in their lifetime:
   - *Supplementary Schools*
   - *Day Schools*
   - *JCCs*
   - *Israel programs*
   - *Early Childhood programs*

   In addition to these areas, other fields of interest to the specific communities could also be included, e.g. a community might be particularly interested in:
   - *Adult learning*
   - *Family education*
   - *Summer camping*
   - *Campus programs*
   - *Etc...*

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

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

C. VISION

A Lead Community will be characterized by its **ongoing interest in the goals** of the project. Educational, rabbinic and lay leaders will project a vision of what the community hopes to achieve several years hence, where it wants to be in terms of the Jewish knowledge and behavior of its members, young and adult. This vision could include elements such as:
   - *adolescents have a command of spoken Hebrew;*
   - *intermarriage decreases;*
   - *many adults study classic Jewish texts;*
   - *educators are qualified and engaged in ongoing training;*
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- *a locally produced Jewish history curriculum is changing the way the subject is addressed in formal education;*
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The vision, the goals, the content of Jewish education would be addressed at two levels:

1. At the communal level the leadership would develop and articulate a notion of where it wants to be, what it wants to achieve.

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

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

D. BUILDING THE PROFESSION OF JEWISH EDUCATION

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

1. Hire 2-3 additional outstanding educators to bolster the strength of educational practice in the community and to energize thinking about the future.

2. Create several new positions, as required, in order to meet the challenges. For example: a director of teacher education or curriculum development, or a director of Israel programming.

3. Develop ongoing in-service education for most educators in the community, by programmatic area or by subject matter (e.g.the teaching of history in supplementary schools; adult education in community centers).

4. Invite training institutions and other national resources to join in the effort, and invite them to undertake specific assignments in lead communities. (E.g. Hebrew Union College might assume responsibility for in-service education of all Reform supplementary school staff. Yeshiva University would do so for Orthodox day-schools.)

5. Recruit highly motivated graduates of day schools who are students at the universities in the Lead Community to commit themselves to multi-year assignments as educators in supplemen- tary schools and JCCs.

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

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   * *Early childhood programs*
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   * *Day schools*
   * *Israel Experience programs*

   It works in the following way:

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

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

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

2. *MONITORING EVALUATION FEEDBACK*

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

   a. To carry out **ongoing monitoring of progress** in Lead Communities, in order to assist community leaders, planners and educators in their work. A researcher will be commissioned for each Lead Community and will collect and analyze data and offer it to

practitioners for their consideration. The purpose of this process is to improve and correct implementation in each Lead Community.

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

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

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

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

The first question is essential for establishing that specific goals exist for improving Jewish education, and for disclosing what these goals are. The second and third questions concern

the "enabling options" decided upon in *A Time to Act* , the areas of improvement which are essential to the success of Lead communities: mobilizing community support, and building a profession of Jewish education.

3. *PROFESSIONAL SERVICES*

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

a. Educational consultants to help introduce best practices.

b. Field researchers for monitoring, evaluation and feed-back.

c. Planning assistance as required.

d. Assistance in mobilizing the community.

4. *FUNDING FACILITATION*

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

5. *LINKS WITH PURVEYORS OR SUPPORTERS OF PROGRAMS*

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

G. LEAD COMMUNITES AT WORK

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

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

a. It would convene all the actors;

b. It would launch an ongoing planning process; and

c. It would deal with content in the following manner.

1. It could make sure that the content is articulated and is implemented.

2. Together with the team of the Best Practices project and with the Chief Education Officer, it would integrate the various content and programmatic components into a whole. For example: it could integrate formal and informal programs.

It could see to it that in any given area (e.g., Israel experience) the vision piece, the goals, are articulated by the various actors and at the various levels:
- *by individual institutions*
- *by the denominations*
- *by the community as a whole.*

In addition, dealing with the content might involve having a "dream department" or "blues-kying unit," aimed at dealing with innovations and change in the programs in the community.

H. LAUNCHING THE LEAD COMMUNITY — YEAR ONE

During its first year (1992/93) the project will include the following:

1. Negotiate an agreement with the CIJE including:

    a. Detail of mutual obligations;

    b. Process issues — working relations within the community and between the community, the CIJE and other organizations

    c. Funding issues;

    d. Other.

2. Establish a local planning group, with a professional staff and with wall-to-wall representation.

3. Gearing-up activities, e.g., prepare a 1-year plan, undertake a self-study (see 6 below), prepare a 5-year plan.

4. Locate and hire several outstanding educators from outside the community to begin work the following year (1993/94).

5. Preliminary implementation of pilot projects that result from prior studies, interests, communal priorities.

6. Undertake an educational self-study, as part of the planning activities:

Most communities have recently completed social and demographic studies. Some have begun to deal with the issue of Jewish continuity and have taskforce reports on these. Teachers studies exist in some communities. All of these will be inputs into the self-study. However, the study itself will be designed to deal with the important issues of Jewish education in that community. It will include some of the following elements:

a. Assessment of needs and of target groups (clients).

b. Rates of participation.

c. Preliminary assessment of the educators in the community (e.g., their educational backgrounds).

The self-study will be linked with the work of the monitoring, evaluation and feedback project.

Some of the definition of the study and some of the data collection will be undertaken with the help of that project's field researcher.

LEAD COMMUNITIES AT WORK

A. INTRODUCTION

The Commission on Jewish Education in North America completed its work with five recommendations. The establishment of Lead communities is one of those recommendations, but it is also the means or the place where the other recommendations will be played out and implemented. Indeed, a lead community will demonstrate locally, how to:

1. Build the profession of Jewish education and thereby address the shortage of qualified personnel;

2. Mobilize community support to the cause of Jewish education;

3. Develop a research capability which will provide the knowledge needed to inform decisions and guide development. In Lead Communities this will be undertaken through the monitoring, evaluation and feedback project;

4. Establish an implementation mechanism at the local level, parallel to the Council for Initiatives in Jewish Education, to be a catalyst for the implementation of these recommendations;

5. The fifth recommendation is, of course, the lead community itself, to function as a local laboratory for Jewish education.

B.   THE SCOPE OF THE PROJECT

1.   A Lead Community will be an entire community engaged in a major development and improvement program of its Jewish education. Three model communities will be chosen to demonstrate what can happen where there is an infusion of outstanding personnel into the educational system, where the importance of Jewish education is recognized by the community and its leadership and where the necessary resources are secured to meet additional needs.

The vision and programs developed in Lead Communities will demonstrate to the Jewish Community of North America what Jewish education at its best can achieve.

2.   The Lead Community project will involve all or most Jewish education actors in that community. It is expected that lay leaders, educators, rabbis and heads of educational institutions of all ideological streams and points of view will participate in the planning group of the project, to shape it, guide it and take part in decisions.

1

3.   The Lead Community project will deal with the major educa-
tional areas -- those in which most people are involved at some
point in their lifetime:

    - Supplementary Schools
    -Day Schools
    - JCCs
    - Israel programs
    - Early Childhood programs

In addition to these areas, other fields of interest to the
specific communities will also be included, e.g. a community
might be particularly interested in:

    - Adult learning
    - Family education
    - Summer camping
    - Campus programs
    - etc...

4.   Most or all institutions of a given area will be involved in
the program (e.g. most or all supplementary schools).

5.   A large proportion of the community's Jewish population will
be involved.

C.   VISION

A Lead Community will be characterized by its ongoing interest in
the goals of the project. Educational, rabbinic and lay leaders
73 will project a vision of what the community hopes to achieve
several years hence, where it wants to be in terms of the Jewish
knowledge and behavior of its members, young and adult. This
vision could include elements such as:

- adolescents have a command of spoken Hebrew;
- intermarriage decreases;
- many adults study classic Jewish texts;
- educators are qualified and engaged in ongoing training;
- supplementary school attendance has increased dramatically;
- a locally produced Jewish history curriculum is changing the
  way the subject is addressed in formal education;
- the local Jewish press is educating through the high level of
  its coverage of key issues.

The vision, the goals, the content of Jewish education will be
addressed at two levels:

1.   At the communal level the leadership will develop and artic-
ulate a notion of where it wants to be, what it wants to achieve.

2.   At the level of individual institutions or groups of insti-
tutions of similar views (e.g., all Reform schools), educators,

2

rabbis, lay leaders and parents will articulate the educational goals.

It is anticipated that these activities will create much debate and ferment in the community, that they will focus the work of the Lead Communities on core issues facing the Jewish identity of North American Jewry, and that they will demand of communities to face complex dilemmas and choices (e.g., the nature and level of commitment that educational institutions will demand and aspire to). At the same time they will re-focus the educational debate on the content of education.

The Institutions of Higher Jewish Learning, the denominations, the national organizations will join in this effort, to develop alternative visions of Jewish education. First steps have already been taken (e.g., JTS preparing itself to take this role for Conservative schools in Lead Communities).

D.   BUILDING THE PROFESSION OF JEWISH EDUCATION

Communities will want to address the shortage of qualified personnel for Jewish education in the following ways:

1.   Hire 2-3 additional outstanding educators to bolster the strength of educational practice in the community and to energize thinking about the future.

2.   Create several new positions, as required, in order to meet the challenges. For example: a director of teacher education or curriculum development, or a director of Israel programming.

3.   Develop ongoing in-service education for most educators in the community, by programmatic area or by subject matter (e.g.the teaching of history in supplementary schools; adult education in community centers).

4.   Invite training institutions and other national resources to join in the effort, and invite them to undertake specific assign-ments in lead communities. (E.g. Hebrew Union College might assume responsibility for in-service education of all Reform supplementary school staff. Yeshiva University would do so for day-schools)

5.   Recruit highly motivated graduates of day schools who are students at the universities in the Lead Community to commit themselves to multi-year assignments as educators in supplemen-tary schools and JCCs.

6.   Develop a thoughtful plan to improve the terms of employment of educators in the community (including salary and benefits, career ladder, empowerment and involvement of front-line educa-tors in the Lead Community development process.)

Simultaneously the CIJE has undertaken to deal with continental

3

initiatives to improve the personnel situation. For example it works with foundations to expand and improve the training capability for Jewish educators in North America.

E.   DEVELOPING COMMUNITY SUPPORT

This will be undertaken as follows:

1.   Establishing a wall to wall coalition in each Lead Community, including the Federation, the congregations, day schools, JCCs, Hillel etc..

2.   Developing a special relationship to rabbis and synagogues.

3.   Identify a lay "Champion" who will recruit a leadership group that will drive the Lead community process.

4.   Increase local funding for Jewish education.

5.   Develop a vision for Jewish education in the community.

6.   Involve the professionals in a partnership to develop this vision and a plan for its implementation.

7.   Establish a local implementation mechanism with a professional head.

8.   Encourage an ongoing public discussion of and advocacy for Jewish education.

F.   THE ROLE OF THE CIJE IN ESTABLISHING LEAD COMMUNITIES:

The CIJE, through its staff, consultants and projects will facilitate implementation of programs and will ensure continental input into the Lead Communities. The CIJE will make the following available:

1.   Best Practices

A project to create an inventory of good Jewish educational practice was launched. The project will offer Lead Communities examples of educational practice in key settings, methods, and topics, and will assist the communities in "importing," "translating," "re-inventing" best practices for their local settings.

The Best
Practices initiative has several interrelated dimen- sions. In the first year (1991/92) the project deals with best practices in the following areas:

   -- Supplementary schools

4

-- Early childhood programs
-- Jewish community centers
-- Day schools
-- Israel Experience programs

It works in the following way:

a.   First a group of experts in each specific area is recruited to work in an area (e.g., JCCs). These experts are brought together to define what characterizes best practices in their area, (e.g., a good supplementary school has effective methods for the teaching of Hebrew).

b.   The experts then seek out existing examples of good programs in the field. They undertake site visits to programs and report about these in writing.

As lead communities begin to work, experts from the above team will be brought into the lead community to offer guidance about specific new ideas and programs, as well as to help import a best practice into that community.

2. Monitoring Evaluation Feedback

The CIJE has established an evaluation project. Its purpose is three-fold:

a.   to carry out ongoing monitoring of progress in Lead Communities, in order to assist community leaders, planners and educators in their work. A researcher will be commissioned for each Lead Community and will collect and analyze data and offer it to practitioners for their consideration. The purpose of this process is to improve and correct implementation in each Lead Community.

b.   to evaluate progress in Lead Communities -- assessing, as time goes on, the impact and effectiveness of each program, and its suitability for replication elsewhere. Evaluation will be conducted by a variety of methods. Data will be collected by the local researcher. Analysis will be the responsibility of the head of the evaluation team with two purposes in mind: 1) To evaluate the effectiveness of individual programs and of the Lead Communities themselves as models for change, and 2) To begin to create indicators (e.g., level of participation in Israel programs; achievement in Hebrew reading) and a database that could serve as the basis for an ongoing assessment of the state of Jewish education in North America. This work will contribute in the long term to the publication of a periodic "state of Jewish education" report as suggested by the Commission.

c.   The feedback-loop: findings of monitoring and evaluation activities will be continuously channeled to local and CIJE planning activities in order to affect them and act as an ongoing corrective. In this manner there will

5

be a rapid exchange of knowledge and mutual influence between practice and planning. Findings from the field will require ongoing adaptation of plans. These changed plans will in turn, affect implementation and so on.

During the first year the field researchers will be principally concerned with three questions:

(a)   What are the visions for change in Jewish education held by members of the communities? How do the visions vary among different individuals or segments of the community? How vague or specific are these visions?

(b)   What is the extent of community mobilization for Jewish education? Who is involved, and who is not? How broad is the coalition supporting the CIJE's efforts? How deep is participation within the various agencies? For example, beyond a small core of leaders, is there grass-roots involvement in the community? To what extent is the community mobilized financially as well as in human resources?

(c) What is the nature of the professional life of educators in this community? Under what conditions do teachers and principals work? For example, what are their salaries and benefits? Are school faculties cohesive, or fragmented? Do principals have offices? What are the physical conditions of classrooms? Is there administrative support for innovation among teachers?

The first question is essential for establishing that specific goals exist for improving Jewish education, and for disclosing what these goals are. The second and third questions concern the "enabling options" decided upon in A Time to Act , the areas of improvement which are essential to the success of Lead communities: mobilizing community support, and building a profession of Jewish education.

3.   Professional services:

The CIJE will offer professional services to Lead Communities, including:

    a.   Educational consultants to help introduce best practices.

    b.   Field researchers for monitoring, evaluation and feed-back.

    c.   Planning assistance as required.

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The CIJE will establish and nurture contacts between foundations interested in specific programmatic areas and Lead Communities that are developing and experimenting with such programs (e.g., the CRB Foundations and youth trips to Israel; MAF and personnel training; Blaustein and research).

5.   Links with   purveyors   or supporters   of programs

The CIJE will develop partnerships between national organizations (e.g., JCCA, CLAL, JESNA, CAJE), training institutions and Lead Communities. These purveyors will undertake specific assignments to meet specific needs within Lead Communities.

G.   LEAD COMMUNITES AT WORK

The Lead Community itself will work in a manner very similar to that of the CIJE. In fact, it is proposed that a local "CIJE" should be established to be the mechanism that will plan and see to the implementation and monitor the programs. What will this local mechanism (from hereonin: "the local planning group") do?

a.   It will convene all the actors;
b.   It will launch an ongoing planning process; and
c.   It will deal with content in the following manner.

   1.   It will make sure that the content is articulated and is implemented.

   2.   Together with Barry Holtz and his team, and with Shulamith Elster integrate the various content components and programmatic components into a whole. For example: integrate formal and informal programs. In terms of the Israel Experience that the vision piece, the goals, are articulated by the various actors and at the various levels:
   --   by individual institutions
   --   by the denominations
   --   by the communmity as a whole.

   In addition, dealing with the content will involve having a "dream department" or "blueskying unit," aimed at dealing with innovations and change in the programs in the community (see Barry Holtz' paper).

H. LAUNCHING THE LEAD COMMUNITY -- YEAR ONE

During its first year (1992/93) the project will include the following:

1.   Negotiate an agreement with the CIJE that includes:

   a.   Detail of mutual obligations;

7

b.   Process issues -- working relations within the community and between the community, the CIJE and other organizations

c.   Funding issues;

d.   Other.

2.   Establish a local planning group, with a professional staff, with wall-to-wall representation.

3.   Gearing-up activities, e.g., prepare a 1-year plan, undertake a self-study (see 6 below), prepare a 5-year plan.

4.   Locate and hire several outstanding educators from outside the community to begin work the following year (1993/94).

5.   Preliminary implementation of pilot projects that result from prior studies, interests, communal priorities.

6.   Undertake an educational self-study, as part of the planning activities:

Most communities have recently completed social and demographic studies. Some have begun to deal with the issue of Jewish continuity and have taskforce reports on these. Teachers studies exist in some communities. All of these will be inputs into the self-study. However, the study itself will be designed to deal with the important issues of Jewish education in that community. It will include some of the following elements:

a.   Assessment of needs and of target groups (clients).
b.   Rates of participation.
c.   Preliminary assessment of the educators in the community (e.g., their educational backgrounds).

The self-study will be linked with the work of the monitoring, evaluation and feedback project.

Some of the definition of the study and some of the data collection will be undertaken with the help of that project's field V3 researcher.

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8