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CIJE correspondence, meetings, planning documents, and workplan. MEF planning, 1991-1993.

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# THE CIJE – PRELIMINARY WORKPLAN 1992/1993

# A. Function, Structure and Staffing Assumptions

The following assumptions guide this plan:

- 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.
- 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).

# 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.
- 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 background documents for example, what would the Israel experience be in a lead community and discussing with the appropriate organization or foundation their interest in taking all or part of the program upon themselves.
- c) Provide funding facilitation as required.
- d) Provide planning guidance for:
  - 1) The self-study
  - 2) The one-year plan
  - 3) Pilot projects to be launched in year 1
  - 4) The five-year plan
- e) Complete plans for the introduction of the Best Practices project into the community and make educational consultants available to the communities.
- f) Introduce the Monitoring and Evaluation project in the community (field researchers to conduct preliminary interviews) and help process the findings of the periodic reports (first one in January 1993).
- g) Provide guidance for the development of vision-, mission-, goal- statements at institutional and community levels.
- h) Appoint a key staff consultant for each community to mediate the content (community mobilization; building the profession) and make educational consultants available for specific needs (e.g., develop in-service training 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.).

• 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:

- 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.

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Office of the Chair Morton L. Mandlel

December 21, 1992

Dear CIJE Board Member:

"...A huge bombshell has been dropped in our midst -- the CJF National Jewish Population Survey...Only a major sea change in the priorities of the American Jewish community which will place Jewish education -- a systematically reformed Jewish education -- at the tcp of the agenda can provide hope against a mounting tidal wave of assimilation which threatens to engulf us."

This highly charged call to action was delivered by Stuart Eizenstat to the delegates of the CJF General Assembly in November during a day devoted to Jewisn continuity and identity. I was pleased to chair the panel at which Stu presented these remarks. As I listened to his wise comments, I couldn't help but feel a considerable degree of satisfaction in the knowledge that CIJE is playing a leading role in this process of change.

During the GA, we hosted an informal gathering for delegates from our three Lead Communities and those of our Board who could attend. It was an emotional high to hear leaders of Atlanta, Baltimore, and Milwaukee speak with great enthusiasm about the Lead Communities Project.

As you are aware, these are three very different communities but each is now engaged in the planning process with us at a pace that reflects their unique communal structure.

Considering the diversity of our three Lead Communities, of primary importance to the Lead Communities Project is the documentation of <u>now</u> real change in Jewish education is accomplished. To that end we have implemented the Monitoring, Evaluation, and Feedback Project. Three professionals, each with her own area of expertise in education and research, are already at work in the Lead Communities to collect and analyze data on an ongoing basis. This information will provide communities with a meaningful tool for evaluating themselves and the process and progress of change.

But this Project serves an even greater purpose. We have never held the conviction that there is only one right way of achieving success. Therefore we also see the Monitoring, Evaluation, and Feedback Project as a means for us to develop well-tested guidelines for change which can be utilized in any community.

At our last Board meeting we spoke of setting up some key committees to oversee various aspects of CIJE's operation. To date, the following Directors have agreed to be committee chairs:

- John Colman (Chicago) -- the Best Practices Project Committee
- Chuck Ratner (Cleveland) -- the Lead Communities Project Committee
- Esther Leah Ritz (Milwaukee) -- the Monitoring, Evaluation, and Feedback Project Committee

In addition, we have formed an Executive Committee which will act on the Board's behalf between meetings and will prepare reports to the Board. Its members include:

It has taken us just two short years to go from the abstract to the concrete. Since the release of the recommendations of the Commission on Jewish Education in North American in 1990, we have created an entity to oversee the implementation of these recommendations, assembled a team of exceptional professionals, further refined the guidelines for accomplishing change, selected three outstanding communities to share in this great experiment, and taken our first steps towards not only reversing the trends reported in the recent CJF study, but also towards revitalizing our Jewisn communities.

We look forward to sharing even more accomplishments with you at our next Board meeting on February 25, 1992.

My warmest wishes to each one of you for a wonderful Chanukah and Healthful New Year.

Morton L. Mandel

Enclosure

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION 1992-93 BOARD OF DIRECTORS

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# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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Charles Brontman	Matthew Maryles
John Colman	Melvin Merians
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David Hirschhorn	Esther Leah Ritz

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We look forward to sharing even more accomplishments with you at our next Board meeting on February 25, 1992.

My warmest wishes to each one of you for a wonderful Chanukah and Healthful New Year.

Morton L. Mandel

Enclosure

#### MINUTES.

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## COUNCIL FOR INITIATIVES IN JEWISH EDUCATION BOARD OF DIRECTORS MEETING August 25, 1992 10:00 A.M.-3:30 P.M. UJA-Federation of Jewish Philanthropies New York, NY

#### Attendance:

Board Members:	David Arnow, Mandell Berman, Charles Bronfman, Gerald Cohen, John Colman, Alfred Gottschalk, Neil Greenbaum, Thomas Hausdorff, David Hirschhorn, Mark Lainer, Norman Lamm, Morton Mandel, Melvin Merians, Charles Ratner, Esther Leah Ritz, Richard Scheuer, Isadore Twersky, Bennett Yanowitz
Policy Advisors Consultants, and Staff:	Shulamith Elster, Seymour Fox, Ellen Goldring, Annette Hochstein, Stephen Hoffman, Barry Holtz, Stanley Horowitz, Martin Kraar, Virginia Levi, Arthur Naparstek, Arthur Rotman, Jo Ann Schaffer, Jacob Ukeles, Jonathan Woocher, Henry Zucker

#### 1. Welcome and Introductory Remarks

Mr. Mandel called the meeting to order at 10:00 a.m. and welcomed participants to the fourth meeting of the CIJE Board. He reviewed the Agenda and then introduced first-time attendees Dr. Ellen Goldring, a CIJE staff member, and Jo Ann Schaffer, Assistant to Art Rotman.

### II. Introduction of CIJE Executive Director,

Mr. Mandel prefaced his remarks by saying that in seeking an Executive Director for CIJE, the Search Committee confirmed the need for the American Jewish community to cultivate professional talent. The Committee was therefore especially pleased that Art Rotman agreed to serve as Executive Director of CIJE while retaining his position as Director of the Jewish Community Centers Association. CIJE has entered into a Purchase of Services agreement with JCCA for certain facilities, services and personnel to run the CIJE operation.

Mr. Mandel thanked Stephen Hoffman for serving as the interim Executive Director and noted his pleasure in welcoming Mr. Rotman to his position as the Executive Director of CIJE.

Mr. Rotman said that he had accepted this position because of his own assessment of the enterprise and his desire to play a part in its success. He said that the Purchase of Service agreement would allow him to utilize the expertise of several JCCA executives. Mr. Rotman added that he was excited by the opportunity of working with the kind of people involved in this endeavor.

#### 111. Population Study and Implications

The chair introduced Dr. Norman Lamm, President of Yeshiva University, a member of the Commission, and now a member of the CIJE Board, to give his reactions to the CJF Population Study.

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Dr. Lamm noted that the most shocking thing about the fact that out-marriage in the Jewish community in North American is now about 52-53% is that anyone was shocked at all. He laid much of the blame on the diluted Jawish education children now receive.

Dr. Lamm believes that the full extent and meaning of this catastrophe has still not been absorbed by the Jewish community. He questions the wisdom of communities investing their limited resources in outreach programs to those with a non-Jewish spouse, thus reducing the funds available to educate Jewish children.

Dr. Lamm noted that this problem affects Jewish communities worldwide, including Israel, and the only remedy he sees is in a program of intensive Jewish education. However this loss of Jews to the community will also make it more difficult to financially sustain Jewish education. He urged everyone in the room to "play to your strength and not to your weakness" by focusing away from marginal Jews and on those of more serious commitment. Dr. Lamm added that this Board "is the best and greatest hope for a new infusion of leadership, ideas, resources, and moral support" for the Jewish educational system.

### IV. Lead Communities at Work

Mr. Mandel stated that the Lead Communities Project may be a key factor in the success of American Jewish continuity and education. He noted that this is a high risk and expensive enterprise, but has the potential to improve the situation substantially.

Mr. Mandel called on Mrs. Annette Hochstein, a consultant to the CIJE who has helped design the content and shape the general thrust of the Lead Communities Project.

A. Mrs. Hochstein reviewed the five recommendations of the Commission on Jewish Education in North America: (1) to establish the CIJE, which has been done; (2) to build the profession of Jewish education -- four major grants have already been awarded to improve training opportunities for Jewish education; (3) to mobilize community support -- the number of Jewish community leaders with Jewish education as a top priority is growing, but more needs to be done; (4) to develop a research capability -- background work has begun in this area; and (5) to establish the Lead Communities Project, to be discussed at this meeting.

The nine candidates for Lead Communities were: Atlanta, Baltimore, Boston, Columbus, MetroWest, Milwaukee, Oakland, Ottawa and Palm Beach.

The Lead Community process will engage an entire community in major efforts to develop and improve programs in Jewish education. The purpose is to demonstrate what can be accomplished with an infusion of outstanding personnel, the recognition by the community and its leadership of the importance of Jewish education, and the commitment of the necessary resources to meet additional needs.

The Lead Community project will be characterized by the content, scope and quality of the endeavor. Each community will emphasize two basic elements: building the profession of

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Jewish education to meet the shortage of qualified Jewish educators, and mobilizing community support. In addition, each will articulate their visions and goals.

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It is envisioned that the Lead Community will hire 2-3 outstanding educators to energize its education workforce. The community will also develop intensive in-service training programs for its educators. It is expected that within 5 years virtually all educators in the community will be participating in on-going in-service training, that new forms of recruitment will be developed, and that the terms of employment (salaries and benefits) will be improved. In addition, there is a need for leadership to be engaged in and knowledgeable about Jewish education. Each Lead Community should have one or more leaders who would ensure that Jewish education is a priority. There should be increased funding for Jewish education in the community; an on-going public debate regarding goals and visions; and a wall-to-wall coalition of key lay leaders, rabbis, and educators.

A Lead Community must also be characterized by the scope of its endeavor: most institutions in the community dealing with Jewish education will be involved in the Project which should touch the lives of most members of the community.

CIJE has initiated two projects to help ensuring the quality of work in Lead Communities. To discuss the first of these projects, Mrs. Hochstein introduced Dr. Barry Holtz, the Director of the Melton Center for Jewish Education at the Jewish Theological Seminary of America, who has been directing the Best Practices Project for the past year.

B. Best Practices Project

Dr. Holtz explained that the aim of the Best Practices Project is to create an inventory of best practices in contemporary Jewish education to provide Lead Communities with examples of excellence and models which they can adapt and implement. A secondary mission of the Project is to create a knowledge base about North American Jewish education which will be of use to Jewish educators throughout the U.S. and Canada.

The Project began by determining the areas of Jewish education on which to focus. A team of experts has been or will be formed in each area to identify successful programs, conduct site visits, and prepared written reports.

There are currently four areas being examined:

- Work in the area of supplementary schools, where the majority of children in North America get their Jewish education, is nearing completion. This area is perceived as a particularly weak component of Jewish education.
- An examination of early childhood Jewish education will begin in September. Successful programs will be those that result in a high proportion of children that go on to other forms of Jewish education.
- The third area is the Israel experience. The work of the CRB Foundation in this area will serve as the basis for recommendations.
- The fourth area of study will be the JCC world. The JCC Association will help to identify outstanding Jewish educational programming in the Jewish Community Center world.

For 1992-93 four new areas will be studied: the day school, the college campus, summer camps, and adult Jewish education.

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Implementation of examples of Best Practices remains to be designed. The Lead Communities will learn about a new project by visiting it, by bringing the people from that project into the community, and by creating seminars for its educators so they can learn how to adapt that example to their community.

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Dr. Holtz noted that the team remains open to what he calls the "Department of Dreams" -innovative ideas in Jewish education that have not yet been implemented and which may inspire Lead Communities to move in new directions in Jewish education.

#### C. Monitoring, Evaluation and Feedback Project

Mrs. Hochstein continued, stating that in order to gauge the impact and effectiveness of programs, the CIJE has hired Dr. Adam Gamoran of the University of Wisconsin to head its project for monitoring, evaluating and providing feedback in the Lead Communities.

Three field researchers have been hired to perform this function. The researchers will collect and analyze data and offer it to community leaders and practitioners for their immediate consideration. The purpose is to improve and correct implementation while the work is going on so that, when needed, change can occur immediately.

In addition, we will be evaluating progress and assessing the impact, effectiveness, and replicability of programs. Lead Communities as a concept for systemic change will also be studied. The resulting data base will be used to assess the state of Jewish education in North America. This work may result in a periodical on "the State of Jewish Education" as suggested by the Commission.

During 1992-93 the researchers will focus on three questions:

- (1) What visions for change in Jewish education are currently held by members of the community?
- (2) To what extent is the community mobilized, not only in terms of leadership, but financially as well.
- (3) What is the professional life of educators in the community like?

In addition, during the first year the Lead Communities will be asked to undertake a "selfstudy" which will help determine the next steps for implementation.

The Lead Communities will be invited to form a local committee to serve as the locus of responsibility for the implementation of the Project. The role of the Lead Community Committee will be to convene all leaders, educators, rabbis, and institutions in the community and invite them to join in the decision making, planning, and implementation of the Project. During the first year it is expected that the local committee will prepare a one year plan for 1992-93, undertake a self-study, begin to develop pilot programs, and draw up a five-year implementation plan. The Committee will manage the process of implementation by coordinating the efforts of various agencies, by initiating programs and efforts where required, and by facilitating improvement where necessary.

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## V. Lead Communities Selection

Mr. Mandel explained that Chuck Ratner had been asked to chair the Lead Communities Selection Committee. He praised Mr. Ratner as an exceptional Chair who brought to this task not only a fine, clear mind, but also a Jewish heart.

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Mr. Ratner stated that the 57 communities invited to participate in the Project represented 3.5 million of the 5.5 million Jews in the United States. Twenty-three responded within a very short time frame with proposals of exceptionally high quality.

Mr. Ratner expressed pleasure in working with the committee, comprised of Charles Bronfman, John Colman, Tim Hausdorff, David Hirschhorn, Mark Lainer, Mort Mandel, Mel Merians and Lester Pollack, and with staff support from Steve Hoffman, Shulamith Elster, Art Rotman, Jack Ukeles, and Jim Meier. He noted that the process was as honest as any he'd been involved with; it was certainly fair; and very tough -- for the communities as well as for the Committee.

Mr. Ratner then introduced Dr. Jacob Ukeles to explain the process of selection.

Dr. Ukeles reported that 57 communities received program guidelines; 34 participated in a national satellite teleconference, and 23 submitted proposals. Each proposal was reviewed by two four-person panels. An overall rating and a composite score was agreed upon for each proposal and the results were submitted to the Lead Communities Selection Committee.

The finalist communities were Atlanta, Baltimore, Boston, Columbus, MetroWest, Milwaukee, Oakland, Ottawa and Palm Beach County.

Prior to the final selection of the Lead Communities, site visits were conducted by Board members, professionals and staff members. The finalists were asked additional questions based on gaps in their preliminary proposals. Levels of participation in educational programs, information on campaign results, and spending on Jewish education were reviewed as clues to the level of financial commitment and capacity. Leadership, financial resources, program, planning, and institutional human resources were considered in determining whether a candidate might be successful as a Lead Community.

There were two important, unanticipated by-products of this process: (1) the site visits increased the understanding and enthusiasm for the Lead Communities Project across the continent; and (2) the site visits themselves acted as catalysts in many communities to advance the commitment to local initiatives for excellence in Jewish education. Communities reported that these visits helped local advocates for Jewish education focus attention, generate excitement and heighten community interest in Jewish education.

Board member John Colman was asked to describe his site visit to Milwaukee.

He reported that he, Shulamith Elster, and Sol Greenfield of the JCC Association had visited Milwaukee looking for symptoms of strengths and weakness in the community. They were conscious of the fact that they were dealing with first impressions and were aware of the importance of putting the community's presentation in perspective.

Following the site visit they evaluated their impressions and summarized them for the Committee.

Mr. Rather spoke about the most significant tension with which Committee members had to contend: the issue of picking communities that would have the best chance to succeed vs. those

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communities with the greatest need. It was decided that the priority was to pick the three communities that were most likely to succeed.

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The Committee recommended that Baltimore, Atlanta, and Milwaukee be invited to become Lead Communities. Each is involved in building the profession and each has brought new talent to the community in the very recent past; each has mobilized community support and demonstrated leadership on both the lay and professional levels; and, each has a vision and articulated goals.

The Committee also recommended that the three communities be asked to enter into a formal letter of understanding with CIJE which would clarify the roles of each in the partnership.

Before the final vote was taken, Mr. Mandel stressed that the decision is not final between the CIJE and Atlanta, Baltimore, and Milwaukee until both sides are satisfied on details. The recommendation that Baltimore, Atlanta and Milwaukee be invited to join CIJE in the Lead Communities Project was passed unanimously.

In the discussion that followed, it was suggested that the Board consider at some future date the growing suburbanization or small town movement within the Jewish community. There are increasing numbers of communities too small to maintain a rabbi and a congregation. The JCC Association's lay leadership model for military communities might be used for such a purpose.

# VI. Concluding Comments

The meeting ended with the thoughtful concluding comments of Mandell Berman, past President of the CJF and JESNA.

Mr. Berman spoke about his involvement in Jewish education which began in the 1950s. He noted that at that time there was very little commitment among lay leaders to Jewish education. He admitted that four years ago when it was decided to form a commission to study issues affecting Jewish education and recommend new directions, he was skeptical. However, he would be leaving this meeting with his skepticism dissipated. He had watched the process; watched as leaders from around the Jewish community were sensitized to the issues. Mr. Berman noted that this is only a beginning, but he was enthusiastic. He felt that this group was committed to making a difference... "For that, Mort, I thank you."

Page

TO: Annette Hochstein FROM: CIJE/New York RE: Senior Policy Advisors Minutes: January 7, 1992

Enclosed for your information. Total: 5 pages Updated Senior Advisor List to follow.

MINUTES COUNCIL FOR INITIATIVES IN JEWISH EDUCATION SENIOR POLICY ADVISORS JANUARY 7, 1992 12:30 - 4:30 P.M. THE JEWISH AGENCY NEW YORK GITY

#### Attendance

Robert Abramson, Jack Bieler, David Dubin, Shulamith Elster, Sylvia Ectemberg, Darrell Friedman, Irving Greenberg, Robert Hirt, Stephen Hoffman, Barry Holtz, Richard Joel, Martin Kraar, Virginia Levi, James Meier, Arthur Rotman, Jeffrey Schein, Alvin Schiff, Barry Shrage, Eliot Spack, Daniel Syme, Jacob Ukeles, Jonathan Woocher

#### Copy to

Josh Elkin, Sam Fisher, Joshua Fishman, Seymour Fox, Gene Greenzweig, Annette Hochstein, Sara Lee, Morton L. Mandel, Daniel Pekarsky, Bernard Reisman, Stephen Solender, Henry L. Zucker

#### I. <u>Welcome and Introductory Remarks</u>

Shulamith Elster welcomed senior policy advisors and thanked The Jewish Agency for its hospitality in hosting the meeting. She announced the addition of Darrell Friedman, President of Associated Jewish Charities & Welfare Fund, Inc. of Baltimore and Jeffrey Schein of the Cleveland College of Jewish Studies to the senior policy advisors and welcomed them to their first meeting. She introduced consultants Barry Holtz. Jim Meier, and Jack Ukeles.

#### II. Report on CIJE Activities

Stephen Hoffman, Acting Director of the CIJE, reported that activities since the August meeting have focused primarily on the development of the Lead Communities project. He noted great excitement for the concept, expressed concerns which have been heightened by the CJF demographic study, and described the desire and willingness on the part of many communities to try new approaches on behalf of Jewish education.

In conjunction with the Lead Communities project, the CIJE has launched the Best Practices project (See III: Best Practices), and has worked with consultants on the development of a system of monitoring, evaluation, and feedback for application in the Lead Communities and the development of a research capability.

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Council for Initiatives in Jewish Education January 7, 1992

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Staff has consulted with a wide range of lay and professional leaders of Jewish education and Jewish communal service to ensure that the agenda of the CIJE reflects the concerns of the denominations, professional organizations, and training institutions.

A search committee of the board has undertaken a search for a full-time director and hopes to have concluded by mid-February. At present, Shulamith Elster remains the single full-time staff member.

#### III. Best Practices

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A. <u>Report</u>

Barry Holtz, Director of the Best Practices Project, reminded the group that one of the recommendations of the Commission was to develop an inventory of best practices for use in supporting the Lead Communities project and for dissemitation to the education community. The first step in this project was to select the first programmatic area from the list of 23 options. There was strong agreement among those polled on the centrality of the <u>supplementary</u> <u>school</u> to any project focusing on Jewish education.

The process of developing an inventory of best practices in supplementary schools will hopefully serve as a model for the development of similar inventories in the other areas. The panel has no illusions of collecting <u>every</u> good example. It was noted that what is being sought are good examples which can serve as models to the Lead Communities and the field.

A team of professional educators, knowledgeable and experienced in supplementary school education, met for two days in December to begin to define exemplary practice in supplementary school education and to establish criteria for the selection of best practices. Members of the team will be visiting schools and summarizing their findings. A guide is now being prepared, library research will be conducted with the assistance of JESNA, and examples will be identified of supplementary schools which meet the criteria. Senior policy advisors will receive the criteria and will be asked to make suggestions. The process will be refined as it progresses.

#### B. <u>Discussion</u>

In the discussion that followed, it was suggested that academics and practitioners may have different views of a successful program. Both should be consulted during the process. It was also noted that the success of some programs depends on the individuals, staff members and principals, while others have a history of success and that this should be considered among the criteria. It was suggested that a look at "best practices" include both good programs and the good policies that help make them successful. Council for Initiatives in Jewish Education January 7, 1992

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There is a concern that an inventory of best practices could "freeze the field." It will be important to encourage innovative and pioneering projects and approaches as well.

A question was raised about the timing of the project relative to Lead Communities. Lead Communities will require a year to develop a plan, during which time it is anticipated that inventories of best practices will have been developed in at least 3-4 programmatic areas.

It was suggested that the best practices project not be viewed as oriented toward <u>radical</u> change, an approach which has not worked in education in the past. Best practice is intended to introduce "first order change," which is more likely to succeed. Senior policy advisors were optimistic about the possibility of successfully implementing change within the Lead Community context.

We should proceed with what can have an early impact while encouraging further study of more major opportunities for change in the future. It was suggested that the 1992 CAJE conference feature the Best Fractices Project and involve a large number of educators on its behalf.

# IV. The Lead Communities Project

Papers describing the rationale, guidelines for potential participants, and timetable for the Lead Communities project had been distributed in advance. These materials prepared by Jack Ukeles and Jim Meier were reviewed in a presentation by Jack Ukeles. His presentation was followed by extensive discussion.

It was suggested that the selection criteria include replicability as a criterion. Rather than focusing solely on replicability, we may be seeking sites in which we can learn lessons about what does and does not work. It was suggested that where not all criteria meet the guidelines, the review committee will have to make decisions. Our ultimate goal is to find models that can succeed.

Concerns were raised about limiting city size to 300,000. It was suggested that New York City or Los Angeles might wish to propose a county or region as a Lead Community. It was agreed that the selection committee would consider such applications, if submitted.

Arguments were made both for extending the timetable and for retaining it as proposed. Some suggested that systemic change cannot be planned in so short a time, while others noted the urgency of moving quickly. It was suggested that the process might be simplified by eliminating a step or by asking that the <u>vision</u> be developed following selection rather than in advance. It was noted, on the other hand, that many communities have begun commission or planning processes similar to that required by the GIJE and are in a position to move relatively quickly. Council for Initiatives in Jewish Education January 7, 1992

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It was hoped that Lead Communities would be encouraged to work together and that they would be asked to share experiences and expertise with other communities outside the Lead Community group.

It was suggested that the materials clarify the commitment of CIJE to the process and be more specific about what CIJE will offer.

V. The chair concluded the meeting with thanks to all who participated. She noted that the suggestions made would be carefully considered as the CIJE moves forward with both the best practices and Lead Communities projects.

She indicated that Adam Gamoran's proposal on monitoring, evaluation, and feedback would be sent with these minutes and that senior policy advisors will be kept informed as each of the projects moves ahead. It is anticipated that this group will meet again in March or April.

#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

MINUTES: Lead Communities Planning Workshop

DATE OF MEETING: November 23-24, 1992

DATE MINUTES ISSUED: December 9, 1992

PARTICIPANTS: Lauren Azoulai, Chaim Botwinick, Shulamith Elster, Seymour Fox, Steven Gelfand, Roberta Goodman, Annette Hochstein, Barry Holtz, Nancy Kutler, Marshall Levin, Daniel Marom, James Meier, Howard Neistein, Arthur Rotman, Claire Rottenberg, Julie Tammivaara, Jack Ukeles, Jonathon Woocher, Shmuel Wygoda, Virginia Levi (Sec'y)

#### I. <u>Welcome and Introductions</u>

The meeting opened with the introduction of participants and welcoming remarks by Arthur Rotman, Executive Director of CIJE. Mr. Rotman reviewed the agenda and noted the importance of the Lead Communities in implementing the recommendations of the Commission on Jewish Education in North America.

Representatives of the three communities were then asked to provide brief sketches of their work in Jewish education as a context for further discussion.

#### A. <u>Atlanta</u>

Atlanta has a growing Jewish population. In the early '80s Atlanta conducted a demographic study of the local Jewish community, followed by the development of a strategic plan. Included was a recommendation to reorganize the services of the Bureau of Jewish Education, reassigning functional responsibility to other appropriate agencies. Atlanta has five day schools. It is working with the CRB Foundation on the development of Israel experience programs, has a Commission on Jewish Continuity, and has recently established a Jewish Education Fund.

#### B. <u>Baltimore</u>

Baltimore has a stable Jewish population of 92,000. A two-year planning initiative concluded in 1990 with a series of recommendations including the need to increase funding for Jewish education (has been increased from 25% to 33%) and the establishment of a commission to look at the local Jewish education system, now in its third year. Outcomes include a strategic plan for Jewish education and the establishment of a Fund for Jewish Education which is currently undertaking a \$10 million campaign. Day and supplementary schools are beginning to 5. It was concluded that Jewish education must be raised to a level which permits it to compete with the many alternatives available. This can best be accomplished by bringing local and continental resources together, by working intensively in limited settings, by working through programs, and by constantly monitoring, evaluating, and providing feedback.

### B. The Task Ahead

Mrs. Hochstein suggested a list of possible actions, some of which should be under way within the next year. This reflects the sense that communities wish to see concrete signs of progress as early as possible. One or more of the following should be undertaken as the community proceeds with the planning process.

- Pilot projects to be undertaken in personnel and community mobilization. In an effort to mobilize local top leaders, CIJE proposes to bring a member of its board to begin an ongoing dialogue with them on the Lead Communities project and its educational endeavors.
- Establishment of a local commission with broad representation, staff support, possible subcommittees or task forces and the possibility of one or several concrete products at the end of the first year.
- Conduct a survey of educators to establish the current situation as a basis for ascertaining training and staffing needs.
- Select one or two areas of Best Practices for early implementation P.g., supplementary school and early childhood, develop a plan and begin to work.
- 5. Proceed with the design and work of monitoring, evaluation, and feedback.
- 6. Draft a five-year plan with the assistance of a detailed guide to be provided by CIJE.
- Establish lines of communication among CIJE, the Lead Communities, and the continental community.

This presentation concluded the evening portion of the meeting. The group reconvened on Tuesday, November 24.

#### III. Introductory Remarks

As the morning session opened. Steve Gelfand of Atlanta noted on behalf of the three communities that the Lead Communities hoped to resolve the following in the near future: will rely on CIJE for help with evaluation. It was also suggested that lay leaders should be involved in defining the evaluation process.

It was noted that it will be difficult to garner lay support for approaches that cannot be evaluated, but that funders are likely to support what they see as a "reasonable gamble." With this in mind, an approach to be considered would be the identification of a project which can be undertaken and evaluated in the development of personnel, perhaps with a focus on senior personnel.

#### V. The Role of CIJE

A. Best Practices and Consultation

Barry Holtz outlined the work he has undertaken over the past 18 months to identify areas for study followed by the development of an inventory of Best Practices to provide models of excellence for introduction into Lead Communities. Best Practices research is being undertaken in the following areas:

1. The Supplementary School

This area was begun first and is nearly ready for use in the Lead Communities. A team of experts has identified nine successful supplementary school programs, has conducted site visits, and has submitted reports on these exemplary programs.

### 2. Early Thildhood Jewish Education

This is being looked at in the variety of settings in which early childhood education occurs. Reports are being submitted on exemplary programs.

3. <u>The JGC</u>

Each Lead Community has a JCC. The JCCA staff will visit each of the three to evaluate what is going well in Jewish education and where they recommend change. At the same time, outside experts will identify 8-9 JCCs which are most effective in the area of Jewish education and Jewish continuity. These programs will be explored and evaluated for use by the Lead Communities.

4. Israel Experience

We are working with the CRB Foundation, which is particularly interested in this area and is developing an approach.

5. Day Schools

We have begun to take the first steps into this important area, and to develop a methodology specific to it. The proposed planning process includes the following seven steps:

- 1. <u>Start-up</u>
  - -- formulation of a commission; undertake to inform and involve stakeholders (e.g., community lay leaders, educators, rabbis, congregational leadership, etc.).
- 2. Self-study
  - -- inventory and profile of educational system.
  - -- assessment of strengths and weaknesses.
  - -- analysis of personnel.
- 3. Identification of critical issues
  - -- community moves from the general to the specific with strategic choices.
- 4. Development of mission or vision statement
- 5. Define priorities
  - -- major strategic recommendations with priority rankings and sequences.
- 6. <u>Design programs</u>
  - -- specific programmatic interventions.
  - -- new initiatives
- 7. Determine strategy to develop resources for implementation

A question was raised regarding the amount of time the planning process would require and how it might be meshed with the local federation allocation process. It was noted that funds can be set aside for anticipated projects, making this a less significant issue.

All three communities expressed concern over the need for staff support of the planning process at a time when "flat campaigns" and local reluctance to add to federation staff make this difficult. It was suggested that if the first request to local lay leadership is to fund staff, this might impact negatively on the buy-in process. In light of the above, it was suggested that CIJE consider providing up to \$40,000 per year for three years toward funding of a position. It was agreed that this proposal would be seriously considered by CIJE.

- 4. Materials for use with focus groups.
- 5 A list of participants in this meeting and others who can be helpful to the communities in moving forward.

### VII. <u>Next Steps</u>

- A. It was agreed that goals and agendas for future meetings of this group will be set jointly. In the interim, Shulamith Elster will serve as a clearinghouse for distributing materials among the Lead Communities and CIJE. Consideration will be given to holding a conference call as a follow-up to this meeting and a means of generating a project for early implementation.
- B. A meeting of this group, possibly to include lay leaders from the communities, will be planned for April 24, to coincide with the CJF Quarterly in Washington, D.C.
- C. It was suggested that one or more CIJE board members plan to meet with local lay leaders early in 1993 Perhaps a kick-off celebration might occur at the same time.
- D. A paper on Best Practices in supplementary schools and steps for introducing Best Practices to the Leac Communities is now being prepared.

#### VIII. <u>Conclusion</u>

The meeting concluded with a sense of hope and expectancy for the future. There was the sense that with ongoing communication and the shared mission of contributing to Jewish continuity for all of North America, the next several years should be exciting and productive.

#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address. 163 Third Avenue #128 New York NY 10003

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

# MEMORANDUM

TO: CIJE Board of Directors DATE: December 7, 1992

FROM: Morton L. Mandel SUBJECT: February Board Meeting

Please hold the date of Thursday, February 25, 1993, for the next meeting of our Board and the CIJE Annual Meeting. The meetings will be held in New York and you will be receiving a notice of the exact location of the meetings within a few weeks. In all likelihood we will begin with coffee at 9:30 a.m. and the Board meeting will get underway promptly at 10:00 a.m. We should conclude about 3:30 p.m.

Attached is a copy of the Minutes from our August Board meeting. We will furnish you with background material for the February meetings as soon as the agendas have been finalized.

CC: Shulamith Elster Seymour Fox Ellen Goldring Sol Greenfield Annette Hochstein Barry Holtz Stanley Horowitz Marty Kraar Ginny Levi ArtNaparstek Lenny Rubin Jack Ukeles Jon Woocher Hank Zucker

#### MINUTES

## COUNCIL FOR INITIATIVES IN JEWISH EDUCATION BOARD OF DIRECTORS MEETING August 25, 1992 10:00 A.M.-3:30 P.M. UJA-Federation of Jewish Philanthropies New York, NY

#### Attendance:

Consultants, Hoffman, B	Ister, Seymour Fox, Ellen Goldring, Annette Hochstein, Stephen arry Holtz, Stanley Horowitz, Martin Kraar, Virginia Levi, Arthur Arthur Rotman, Jo Ann Schaffer, Jacob Ukeles, Jonathan Woocher, er

# 1. Welcome and Introductory Remarks

Mr. Mandel called the meeting to order at 10:00 a.m. and welcomed participants to the fourth meeting of the CIJE Board. He reviewed the Agenda and then introduced first-time attendees Dr. Ellen Goldring, a CIJE staff member, and Jo Ann Schaffer, Assistant to Art Rotman.

# II. Introduction of CIJE Executive Director

Mr. Mandel prefaced his remarks by saying that in seeking an Executive Director for CIJE, the Search Committee confirmed the need for the American Jewish community to cultivate professional talent. The Committee was therefore especially pleased that Art Rotman agreed to serve as Executive Director of CIJE while retaining his position as Director of the Jewish Community Centers Association. CIJE has entered into a Purchase of Services agreement with JCCA for certain facilities, services and personnel to run the CIJE operation.

Mr. Mandel thanked Stephen Hoffman for serving as the interim Executive Director and noted his pleasure in welcoming Mr. Rotman to his position as the Executive Director of CIJE.

Mr. Rotman said that he had accepted this position because of his own assessment of the enterprise and his desire to play a part in its success. He said that the Purchase of Service agreement would allow him to utilize the expertise of several JCCA executives. Mr. Rotman added that he was excited by the opportunity of working with the kind of people involved in this endeavor.

# 111. Population Study and Implications

The chair introduced Dr. Norman Lamm, President of Yeshiva University, a member of the Commission, and now a member of the CIJE Board, to give his reactions to the CJF Population Study.

Dr. Lamm noted that the most shocking thing about the fact that out- marriage in the Jewish community in North American is now about 52-53% is that anyone was shocked at all. He laid much of the blame on the diluted Jewish education children now receive.

Dr. Lamm believes that the full extent and meaning of this catastrophe has still not been absorbed by the Jewish community. He questions the wisdom of communities investing their limited resources in outreach programs to those with a non-Jewish spouse, thus reducing the funds available to educate Jewish children.

Dr. Lamm noted that this problem affects Jewish communities worldwide, including Israel, and the only remedy he sees is in a program of intensive Jewish education. However this loss of Jews to the community will also make it more difficult to financially sustain Jewish education. He urged everyone in the room to "play to your strength and not to your weakness" by focusing away from marginal Jews and on those of more serious commitment. Dr. Lamm added that this Board "is the best and greatest hope for a new infusion of leadership, ideas, resources, and moral support" for the Jewish educational system.

### IV. Lead Communities at Work

Mr. Mandel stated that the Lead Communities Project may be a key factor in the success of American Jewish continuity and education. He noted that this is a high risk and expensive enterprise, but has the potential to improve the situation substantially.

Mr. Mandel called on Mrs. Annette Hochstein, a consultant to the CIJE who has helped design the content and shape the general thrust of the Lead Communities Project.

A. Mrs. Hochstein reviewed the five recommendations of the Commission on Jewish Education in North America: (1) to establish the CIJE, which has been done; (2) to build the profession of Jewish education -- four major grants have already been awarded to improve training opportunities for Jewish education; (3) to mobilize community support -- the number of Jewish community leaders with Jewish education as a top priority is growing, but more needs to be done; (4) to develop a research capability -- background work has begun in this area; and (5) to establish the Lead Communities Project, to be discussed at this meeting.

The nine candidates for Lead Communities were: Atlanta, Baltimore, Boston, Columbus, MetroWest, Milwaukee, Oakland, Ottawa and Palm Beach.

The Lead Community process will engage an entire community in major efforts to develop and improve programs in Jewish education. The purpose is to demonstrate what can be accomplished with an infusion of outstanding personnel, the recognition by the community and its leadership of the importance of Jewish education, and the commitment of the necessary resources to meet additional needs.

The Lead Community project will be characterized by the content, scope and quality of the endeavor. Each community will emphasize two basic elements: building the profession of

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Jewish education to meet the shortage of qualified Jewish educators, and mobilizing community support. In addition, each will articulate their visions and goals.

It is envisioned that the Lead Community will hire 2-3 outstanding educators to energize its education workforce. The community will also develop intensive in-service training programs for its educators. It is expected that within 5 years virtually all educators in the community will be participating in on-going in-service training, that new forms of recruitment will be developed, and that the terms of employment (sataries and benefits) will be improved. In addition, there is a need for leadership to be engaged in and knowledgeable about Jewish education. Each Lead Community should have one or more leaders who would ensure that Jewish education is a priority. There should be increased funding for Jewish education in the community; an on-going public debate regarding goals and visions; and a wall-to-wall coalition of key lay leaders, rabbis, and educators.

A Lead Community must also be characterized by the scope of its endeavor: most institutions in the community dealing with Jewish education will be involved in the Project which should touch the lives of most members of the community.

CIJE has initiated two projects to help ensuring the quality of work in Lead Communities. To discuss the first of these projects, Mrs. Hochstein introduced Dr. Barry Holtz, the Director of the Melton Center for Jewish Education at the Jewish Theological Seminary of America, who has been directing the Best Practices Project for the past year.

B. Best Practices Project

Dr. Holtz explained that the aim of the Best Practices Project is to create an inventory of best practices in contemporary Jewish education to provide Lead Communities with examples of excellence and models which they can adapt and implement. A secondary mission of the Project is to create a knowledge base about North American Jewish education which will be of use to Jewish educators throughout the U.S. and Canada.

The Project began by determining the areas of Jewish education on which to focus. A team of experts has been or will be formed in each area to identify successful programs, conduct site visits, and prepared written reports.

There are currently four areas being examined:

- Work in the area of supplementary schools, where the majority of children in North America get their Jewish education, is nearing completion. This area is perceived as a particularly weak component of Jewish education.
- An examination of early childhood Jewish education will begin in September. Successful
  programs will be those that result in a high proportion of children that go on to other
  forms of Jewish education.
- The third area is the Israel experience. The work of the CRB Foundation in this area will serve as the basis for recommendations.
- The fourth area of study will be the JCC world. The JCC Association will help to identify
  outstanding Jewish educational programming in the Jewish Community Center world.

For 1992-93 four new areas will be studied: the day school, the college campus, summer camps, and adult Jewish education.

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Implementation of examples of Best Practices remains to be designed. The Lead Communities will learn about a new project by visiting it, by bringing the people from that project into the community, and by creating seminars for its educators so they can learn how to adapt that example to their community.

Dr. Holtz noted that the team remains open to what he calls the "Department of Dreams" -innovative ideas in Jewish education that have not yet been implemented and which may inspire Lead Communities to move in new directions in Jewish education.

#### C. Monitoring, Evaluation and Feedback Project

Mrs. Hochstein continued, stating that in order to gauge the impact and effectiveness of programs, the CIJE has hired Dr. Adam Gamoran of the University of Wisconsin to head its project for monitoring, evaluating and providing feedback in the Lead Communities.

Three field researchers have been hired to perform this function. The researchers will collect and analyze data and offer it to community leacers and practitioners for their immediate consideration. The purpose is to improve and correct implementation while the work is going on so that, when needed, change can occur immediately.

In addition, we will be evaluating progress and assessing the impact, effectiveness, and replicability of programs. Lead Communities as a concept for systemic change will also be studied. The resulting data base will be used to assess the state of Jewish education in North America. This work may result in a periodical on "the State of Jewish Education" as suggested by the Commission.

During 1992-93 the researchers will focus on three questions:

- (1) What visions for change in Jewish education are currently held by members of the community?
- (2) To what extent is the community mobilized not only in terms of leadership, but financially as well.
- (3) What is the professional life of educators in the community like?

In addition, during the first year the Lead Communities will be asked to undertake a "selfstudy" which will help determine the next steps for implementation.

The Lead Communities will be invited to form a local committee to serve as the locus of responsibility for the implementation of the Project. The role of the Lead Community Committee will be to convene all leaders, educators, rabbis, and institutions in the community and invite them to join in the decision making, planning, and implementation of the Project. During the first year it is expected that the local committee will prepare a one year plan for 1992-93, undertake a self-study, begin to develop pilot programs, and draw up a five-year implementation plan. The Committee will manage the process of implementation by coordinating the efforts of various agencies, by initiating programs and efforts where required, and by facilitating improvement where necessary.

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#### V. Lead Communities Selection

Mr. Mandel explained that Chuck Ratner had been asked to chair the Lead Communities Selection Committee. He praised Mr. Ratner as an exceptional Chair who brought to this task not only a fine, clear mind, but also a Jewish heart.

Mr. Ratner stated that the 57 communities invited to participate in the Project represented 3.5 million of the 5.5 million Jews in the United States. Twenty-three responded within a very short time frame with proposals of exceptionally high quality.

Mr. Ratner expressed pleasure in working with the committee, comprised of Charles Bronfman, John Colman, Tim Hausdorff, David Hirschhorn, Mark Lainer, Mort Mandel, Mel Merians and Lester Pollack, and with staff support from Steve Hoffman, Shulamith Elster, Art Rotman, Jack Ukeles, and Jim Meler. He noted that the process was as honest as any he'd been involved with; it was certainly fair; and very tough -- for the communities as well as for the Committee.

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He reported that he, Shulamith Elster, and Sol Greenfield of the JCC Association had visited Milwaukee looking for symptoms of strengths and weakness in the community. They were conscious of the fact that they were dealing with first impressions and were aware of the importance of putting the community's presentation in perspective.

Following the site visit they evaluated their impressions and summarized them for the Committee.

Mr. Ratner spoke about the most significant tension with which Committee members had to contend: the issue of picking communities that would have the best chance to succeed vs. those

communities with the greatest need. It was decided that the priority was to pick the three communities that were most likely to succeed.

The Committee recommended that Baltimore, Atlanta, and Milwaukee be invited to become Lead Communities. Each is involved in building the profession and each has brought new talent to the community in the very recent past; each has mobilized community support and demonstrated leadership on both the lay and professional levels; and, each has a vision and articulated goals.

The Committee also recommended that the three communities be asked to enter into a formal letter of understanding with CIJE which would clarify the roles of each in the partnership.

Before the final vote was taken, Mr. Mandel stressed that the decision is not final between the CIJE and Atlanta, Baltimore, and Milwaukee until both sides are satisfied on details. The recommendation that Baltimore, Atlanta and Milwaukee be invited to join CIJE in the Lead Communities Project was passed unanimously.

In the discussion that followed, it was suggested that the Board consider at some future date the growing suburbanization or small town movement within the Jewish community. There are increasing numbers of communities too small to maintain a rabbi and a congregation. The JCC Association's lay leadership model for military communities might be used for such a purpose.

#### VI. Concluding Comments

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The meeting ended with the thoughtful concluding comments of Mandell Berman, past President of the CJF and JESNA.

Mr. Berman spoke about his involvement in Jewish education which began in the 1950s. He noted that at that time there was very little commitment among lay leaders to Jewish education. He admitted that four years ago when it was decided to form e commission to study issues affecting Jewish education and recommend new directions, he was skeptical. However, he would be leaving this meeting with his skepticism dissipated. He had watched the process; watched as leaders from around the Jewish community were sensitized to the issues. Mr. Berman noted that this is only a beginning, but he was enthusiastic. He felt that this group was committed to making a difference... "For that, Mort, I thank you."

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Lead Community Find Way Shar 2001

# MEMORANDUM

To:	Arthur Rotman			
	Shulamith Elster			
	Sol Greenfield			
	Mitchell Jaffe			

c/o Joann Schaffer

From: Jim Meier

Date: November 13, 1992

Re: Draft in progress of planning manual

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• 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 want 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. 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 refers to preparations, attending to everything that can be done in advance to allow for smooth sailing once the serious work gets underway.

The most important objectives of this phase have already been Deliverables: accomplished by the lead communities:

· Leadership has been identified, and

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## 5 2 Benchmarks/tasks

· Compile packets of background information and distribute to each of the committee members. Box 1 contains a selection of materials that might be useful for this purpose.

· Establish a detailed timetable for the project by working backward from the year 1 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. Don't forget to scan major Jewish and national holidays for conflicts. (See Box

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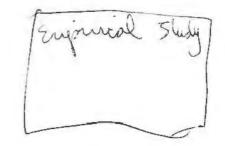
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3. Critical Issues	4-6	<ul> <li>Formulate issues</li> <li>Draft community mission statement</li> </ul>	3a. Resolve strategic issues 3b. Approve mission/vision statement(s)
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Time Guideline: Allow 3 - 4 weeks for the start-up phase of work.

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#### **II. ANALYSIS OF NEEDS**



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Rationale

The foundation of the plan is an assessment of the needs for Jewish education by potential users. A well-done needs analysis serves the process in the following ways:

• 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.

• Can help to establish 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 potential users of the service.

#### Issues

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?

1. <u>Targeting</u>: 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 groups to be the focus of research.

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

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- · Early childhood
- Ages 5-13
- · Post Bar/Bat Mitzvah
- · Jewish educators, formal and informal
- · Families of young children

#### Box 3: Targeting

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

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

• **Priority**: How high a priority is the 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?

- 2. 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 4.

# Box 4: 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.

### 3. 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 cubacks).

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? If enrollment is low 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.

Given the imperative to get underway quickly, we would encourage you to rely on existing information on quality and effectiveness, to the extent possible. Generally speaking, three types of measures can be used: (1) input, (2) output or performance, and (3) outcomes. See Box 5 for examples of measures you might want 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 5: 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 levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, per cent of eligible population participating in formal and informal Jewish education by age group, 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.

#### **Deliverables**

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- The end product is a needs analysis reporting on the following for each key group?
  - a. The size of the total potential market.
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## Benchmarks/Tasks

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b. <u>Measures:</u> Decide on the perspective for measuring the need of each group.

c. <u>Develop Concept Scheme:</u> Layout decisions on design for discussion with committees. [See Appendix 1 for sample]

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. Develop profile of present Jewish education personnel

• 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

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Lead Community Find ISN! -IFN- 2NON

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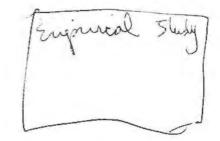
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• Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood, camps counselors, JCC program staff, other informal education personnel) by institution/program

Skills, expertise and background

4. 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 6 for information to include in a profile.)

- 5. Estimate of community need/demand (in categories of B2 and B3)
- 6. Gaps [B5 minus B4]

• 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?

• Students:	
. Enrollment and graduation trends	
. Age range	
· Faculty:	
. Numbers of full- and part-time	
. areas of expertise.	
Program components:	ь
. Subjects	
. Degree(s) offered	
. Activity duration	
. Methods	
. Support resources (e.g. library, training) and services	

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

## Box 6: Methods

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

- Available demographic studies and data: enrollment trends, statistics on personnel involved in Jewish education and communal affairs (e.g., full-time, part-time, turnover, longevity ...), enrollment trends in local day and supplemental school programs (as a predictor of future personnel demands).
- Other national and local studies, commission and planning reports: such as the report of the Commission on Jewish Education in North America, local reports of task forces on Jewish continuity, and strategic planning reports that give insights on trends or external forces that will impact on needs. Experience in other cities can be analyzed for possible relevance. Opportunities for program modification or expansion will be identified where substantial unmet needs are documented and where new revenue opportunities appear to exist.
- Discussion or Focus groups: with selected consumer groups (such as day and supplementary school educators, synagogue lay leaders, students) to gain insights on access barriers as well as desires.
- Questionnaires: attitude surveys of selected sectors of the Jewish community: e.g. about student career interests; motivations for participating in specific program; views of institutional or program strengths or weaknesses; perceptions of their own needs or desires for Jewish education; and past and anticipated involvement in Jewish affairs.

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

what can we do

## **HI. 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 and criteria
- Formulation of critical issues
- Document summarizing consensus of committee on each critical issue
- Vision, or mission statement.

## Benchmarks and Methods

ystem for or mer Assumptions and Criteria: In designing the best possible system for coordinating 1. 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. Assumptions on which there is not consensus may well become "issues" which the committee must address. See Box 7 for sample assumptions.

#### Box 7: 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.

There are also criteria -- "values" or decision-rules -- that should help choose or design the best system; i.e., the values that a good system is intended to satisfy. These too should be articulated on paper for sign-off by the committee. (See Box 8 for sample criteria.)

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1.	Maximize parental involvement in their children's education and support and encourage family education (including programs for parents; activities for parents initiated by and around school; and/or activities for family groupings).					
2.	Support improvements in the professional status of principals and teachers including incentives for higher levels of education; improvements in status and rewards for Jewish educators.					
3.	Incorporate a significant vehicle to plan for Jewish education.					
4.	Encourage and support multi-agency networking and cooperative programming.					
5.	Maximize effective utilization of resources (minimize duplication; incorporate an evaluative component).					
6.	Maximize the opportunity to find and replicate good schools.					
7.	Encourage and reward innovation (e.g., use of new technology video computers; experimental efforts to maintain post-bar/bat mitzvah and post-confirmation participation).					
8.	Maximize the opportunity to integrate formal and informal educational techniques (e.g., family shabbatonim; camping + study programs; Israel study programs).					
9.	Encourage deeper communal involvement and support of Jewish education.					
10.	Hold potential to increase enthusiasm/excitement of students, and also their families, for Jewish involvement.					

}

2. <u>Critical Issues</u>: The important choices faced by the community in defining the purposes, overall content, and priorities in Jewish education. The planning committee will attempt to reach agreement(or at least narrow the range of disagreement) regarding the norms and standards for Jewish education throughout the community.

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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 9 for types of issues.)

1.	Mission-level issues i.e. choices relating to the vision, philosophy and the go 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 student mix and recruitment (e.g. the balance between new entrants into the field, continuing education, and re-training people from other fields). Some of these choices relate to faculty (e.g. the balance between full-time and part- time faculty). Other policy issues relate to degrees, curriculum, and other aspects of the educational enterprise).
3.	Standards and Program Issues. Illustrate
4.	Resource and organization issues i.e. choices relating to the internal capacity of the University to support mission and policies (e.g. the financial resources, intra-university structure, possible coordinative and integrative mechanisms).

3. <u>Committee Meets to Discuss Issues</u>: The committee process for deliberation has several steps: [Working of Committee, sub-cteen]

Explicitly ask whether the issues presented are the right issues.

Find areas of agreement and disagreements:

Ed. Study

Resolution of an issue need not strictly adhere to the alternatives that were formulated. It may combine elements of several choices or be an alternative not previously thought of.

Seek to obtain consensus on each item. Where consensus can not be achieved, the committee may agree not to agree. The outcome can

be an explicit area that the plan will not address, or a decision to readdress the issue at a later date.

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4. <u>Formulate Vision Statement</u>: The heart of a strategic plan is a vision or mission statement, which should project a clear view of the aspirations of the community. Because of its importance, and the difficulty of crafting a good one, the vision 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 strategic issues and frame a broad response to the needs assessment. The mission statement should project a clear view of the self-image of the community in relation to Jewish education; indicate where the community will place priorities in Jewish education, suggest what it will and will not seek to accomplish; identify whom it seeks to serve and how.

5. Committee Approves Vision Statement:

Time Guideline: Allow 1 1/2 to 2 1/2 months.

## IV. SETTING STRATEGIES AND PRIORITIES

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

## V. DESIGNING PROGRAMS

A. Initiate program ideas or strategies/preliminary proposals

- 1. Leadership (lay and professional) and community support (e.g.:)
  - coalition building
- recruitment (of leadership and community involvement)
- 2. Programs for personnel
- 3. Programs (e.g.: Israel trips, innovation)
- 4. Planning and evaluation

## 5. Financial resources

B. Select program priorities/phasing

# VI. PREPARE IMPLEMENTATION STRATEGY (Multi-Year Framework, First Year Action Program)

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

# VII. NEXT STEPS: IMPLEMENTING THE PLAN

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

## APPENDICES

[draft: plnguid.03 11-5-92]



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# 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 dottars in research and planning. This approach is understandable but shortsighted. 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.

Planning in the Jewish Community

#### Scope of This Chapter

The purpose of this chapter is to suggest a model for policy planning<sup>1</sup> 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 polities or the frequent changes in direction associated with newly elected officials. Voluntary agencies are "between" the two worlds of government and the private sector in another sense as well. They often receive funding both from public agencies as well as from private sources.

# A Model for Progressive Planning

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.

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Planning in the Jewish Community

### 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, bistory, 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 bread 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 176

## Planning in the Jewish Community

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.

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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 informationgathering 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 .

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Planning in the Jewish Community

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### Planning in the Jewish Community

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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 informationgathering 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

### Planning in the Jewish Community

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 expect 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 difemma 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 geographie 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 identitication 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 longrange 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.

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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 confirm 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

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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 multiconstituency 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).

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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 scrious 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

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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.

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# 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 doltars in research and planning. This approach is understandable but shortsighted. 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.

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## Scope of This Chapter

The purpose of this chapter is to suggest a model for policy planning' 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 polities 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.

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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 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.

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## 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

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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 informationgathering 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.

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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 streen menus relating information to the choices to be made. The consequences of each set of decisions could be computed.

### Strategics

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 longrange 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.

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### Planning in the Jewish Community

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 leader-ship. Most important, the process of preparing a mission statement should confirm 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 pute 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 multiconstituency environment typical of Jewish communal life, different criteria reflecting different values are tikely 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 rext-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). PHONE No. : 12122608760

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### Planning in the Jewish Community

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

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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.



Received: by HUJIVMS (HUyMail-V6j); Thu, 24 Dec 92 17:23:09 +0200 Date: Thu, 24 Dec 92 17:23 +0200 From: <ANNETTE@HUJIVMS> To: annette@hujivms Date: Thu, 24 Dec 92 17:18 +0200 From: <ANNETTE@HUJIVMS> To: EKJC68@ERCVAX.EDINBURGH.AC.UK Subject: Re: data gathering after January

Dear Adam,

Thanks for participating in yesterday's telecon. I believe this may be the beginning of a fruitful partnership between your project and the CIJE Board.

We concluded the Board Meetings of the Mandel Institute today ---Mort will be here for another week and we are having - as always very tough and very honest looks at our projects.

This often results in policy changes, or strategic changes, or new projects...

We had several meetings with Art Rotman and Mort concerning the CIJE and among other we discussed the forthcoming meetings of the CIJE Board - scheduled for February 25, 1993 in New York. Presentations at the meeting will include the key projects (Best Practices; Evaluation (for short); general overview of the idea).

It would be wonderful if you could attend that meeting and offer an overview of the project and where it is going. As you know we all have big stakes in having the notion of research in/for Jewish education understood, the likely benefits that would accrue illustrated, and the whole idea accepted. Therefore - if you had a couple of days available to fly over, present, fly back -- we would be more than happy to defray the costs. We believe that you would offer the most effective presentation on the project.

That's it.

Take good care, Annette Received: by HUJIVMS (HUYMail-V6j); Wed, 23 Dec 92 00:31:39 +0200 Date: Wed, 23 Dec 92 0:31 +0200 From: <ANNETTE@HUJIVMS> To: EKJC68@ERCVAX.EDINBURGH.AC.UK Cc: annette@hujivms Subject: Telecon with Esther-Leah Ritz

Dear Adam,

Thanks for being available later today for the Conference Call. Here is what it is about. Esther-Leah Ritz, our Mandel Institute Board member from Milwaukee is here. Mrs Ritz is a grand lady, a very prominent lay person on the communal scene in North America.

She is a former president of the JCC Association and of many more communal organizations. She was a member of the Commission and is a board member of the CIJE. Art Rotman asked her to head a sub-committee of the CIJE board for your project. She has accepted to do this -- though she prefers to add that this is so "until she finds someone to replace her".

What we need to do today is to brief her on the project, its purpose, methods, desired and anticipated outcomes. All of this in general terms since she is just getting on board. Mrs Ritz is outspoken, straightforward, sure to ask pertinent questions. We need to shape with her the role of her committee, after she receives a picture of what the project is about. This first conversation comes to establish contact between you and her and make direct communications possible when appropriate.

With us on the call will be: Art Rotman, Mrs Ritz, Shmuel Wygoda and Seymour.

Speak to you then,

BEst regards, Annette BMAIL> move gamoran

Ellen, let's you and I now work out a way of letting the field Received: by HUJIVMS via NJE (HUyMail-V6j); Thu, 17 Dec 92 11:18:33 +0200 Received: from RL.IB by UKACRL.BITNET (Mailer R2.07) with BSMTP id 3516; Thu, 17 Dec 92 09:17:37 GMT Received: from RL.IB by UK.AC.RL.IB (Mailer R2.07) with BSMTP id 9129; Thu, 17 Dec 92 09:17:36 GMT UK.AC.ED.ERCVAX; 17 DEC 92 9:14:32 GMT Via: Thu, 17 DEC 92 09:14:48 Date: From: EKJC68@ERCVAX.EDINBURGH.AC.UK annette@hujivms To: Subject: data gathering after January Sender: JANET "EKJC68@UK.AC.EDINBURGH.ERCVAX" <EKJC68@ERCVAX.EDINBURGH.AC.UK>

I like Ellen's idea about shadowing, but I would not abandon the educators unless we are sure it is interfering with implementation, for the reasons I listed (need for baseline data) and for the reason Annette added (need to learn about education in the community). But as Ellen points out, it's difficult to know beforehand who's "in" the CIJE and who isn't. For those who aren't, we don't want to ask questions about lead communities, but we have to introduce ourselves somehow, and we need to avoid giving the false impression that the field researchers ARE the CIJE or that lead communities is primarily a research project. We will have to work this out carefully, in concert with the implementation plans, in January.

Ellen, let's you and I now work out a way of letting the field researchers know what's going on. I'm thinking of presenting it as an issue about which we'd like their advice. Received: by HUJIVMS via NJE (HUyMail-V6j); Mon, 14 Dec 92 13:20:40 +0200 Received: from RL.IB by UKACRL.BITNET (Mailer R2.07) with BSMTP id 2242; Mon, 14 Dec 92 11:20:00 GMT Received: from RL.IB by UK.AC.RL.IB (Mailer R2.07) with BSMTP id 5301; Mon, 14 Dec 92 11:19:59 GMT Via: UK.AC.ED.ERCVAX; 14 DEC 92 11:19:56 GMT Date: Mon, 14 DEC 92 11:20:14 From: EKJC68@ERCVAX.EDINBURGH.AC.UK To: annette@hujivms Subject: RE: conference call Sender: JANET "EKJC68@UK.AC.EDINBURGH.ERCVAX" <EKJC68@ERCVAX.EDINBURGH.AC.UK>

Received your message, agenda sounds good, looking forward to speaking tonight.

[m Received: by HUJIVMS (HUyMail-V6j); Wed, 16 Dec 92 13:26:12 +0200 Date: Wed, 16 Dec 92 13:15 +0200 From: <ANNETTE@HUJIVMS> To: <a href="https://www.example.ac.uk">kKJC68@ERCVAX.EDINBURGH.AC.UK</a> Cc: <a href="https://www.goldrieb@vuctrvax">goldrieb@vuctrvax</a>, annette@hujivms Subject: Re: (Annette, could you pass this on to Seymour also? Thanks.)

Dear Adam,

It was wonderful to receive your E-mail, with its so clear formulation of our common understandings and concerns I would like to respond immediately.

As regards the first issue -- i.e. with whom, when and how do evaluators talk about what -- we here concurr with your

advice and think that option b) is probably the preferred one at this time (subject to ongoing revision). I would just like to add that a major purpose in addition to the ones you state is to allow the field researchers to learn more about the Jewish educational system -- educators institutions and programs.

We also think that it is probably wise to alert the field researchers and thus to miniumise the danger of misunderstanding on their part. They may also have useful insights for us.

Which leeds us to the next point -- the report. Here too we are in agreement. I just wonder if project directors (who - by the way - may be people other than the current planners) should see the draft before or after Art has seen it.

As to the implementation question. At this point we still need to overcome preliminary hurdles or stumbling blocks -things that have not yet been appropriately addressed: getting leadership on board and involved getting agreement on the project
getting dedicated staff
getting the local commission launched

We have of course an action plan, and preparations are moving ahead on all elements e.g. pilot projects for early implementation best practices planning and self-study guidelines etc... but these and other cannot make their conrtribution before a green light of sorts is given locally. We are working on several fronts to get this done Both Mort and Art will be here the whole of next week, at which point we will take decisions.

That's it for implementation thinking - which may or may not include whoops and other modes of communication.

Before signing off - two more points: working with me on this project is Shmuel Wygoda, a colleague who has joined the Institute staff in as senuior researcher. He was with us in the US this past month and will be in on our future communications since he and I work on this project together.

Ellen hello, this should have read Dear Ellen and Adam" Allas I do not know how to edit the thing - so you get cc'd until I know better... sorry.

Warm regards to both of you. We look forward to hearing more and to seeing Ellen.

Annette

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COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 • New York, NY 10003 Phone: (212) 532-1961 • FAX: (212) 213-4078

# MEMORANDUM

To: CIJE Staff and Lead Communities

Date: November 30, 1992

From: Art Rotman

At our meetings last week, 1 introduced Annette Hochstein and Seymour Fox as having a leading role in the design of our plans and programs in the Lead Communities.

In order to give effect to this, I have asked Annette to take the position of Director of the Lead Community Project for CIJE and to have supervisory responsibility for CIJE staff with planning and program responsibilities in the Lead Communities.

At the meeting there was a question as to which of the CIJE staff are to be contacted by community representatives. I suggested that where the contact fit with the known portfolio of a given CIJE staff person, then the contact should be made directly. Shutamith Elster will be the contact in all other situations.

December 15, 1992

Dear Seymour, Annette, and Ellen,

It was nice to talk with you last night. Wouldn't it be something if we all lived in the same city and could meet regularly! I bet we'd get a lot done. As it is we'll have to make do with infrequent conversations.

In this message, I'll first summarize what I took to be the main points from our discussion. Then I'll suggest some possible future directions that may be suitable for the next phase of the lead communities project. Hopefully my suggestions will take account of the actual state of affairs in the communities to date.

I think two main points emerged:

(1) In many cases, important members of the lead communities are having as their first introduction to the CIJE, an interview with the field researchers. This is creating some awkward situations, and may be making it more difficult to provide an effective introduction through the implementation side of the project. (2) If the field researchers prepare reports that are not useful -- for example, if they state the obvious, such as "few people know what a lead community is" -- there is a danger that the funders of and/or participants in the project will, justifiably, complain that we are spending money on researchers which we should be spending on programs.

My reflections on these points are as follows:

The first issue is very serious. Obviously we must not allow the evaluation work to impede the implementation in any way. I think the short-term solution to this issue is straightforward: After this week, we are finished interviewing for the time being. We then have a period of reflection, during which the field researchers will be processing the information they have gathered so far. This period will give us the time to decide to whom they should and should not talk over the next several months. Possible longer-term decisions are:

- (a) talk only with persons leading the local CIJE effort
- (b) talk with the above, and talk with educators also, but don't ask anyone about CIJE who isn't already committed to CIJE
- (c) talk with everyone who will talk to us, as originally planned

Any other possibilities? Provisionally, I favor (b). The reason for continuing to talk to educators would be to collect baseline information about their professional lives, and to monitor changes in their views about the future of Jewish education in their communities. But we do not need to decide this until January.

It would be helpful if we could alert the field researchers to this issue. I don't know if they are planning to conduct an interview here and there after this week -- if so we will need to tell them to stop. More generally, it is advisable to let them know what's going on if possible. Issue number (2) has always been with us. It is, in fact, the reason I have been pushing so hard for a report at the end of January -- I want to show, or at least find out, if the evaluation team can be useful to the implementors as soon as possible. I think we settled on our short-term strategy for this issue over the phone: The field researchers will write their reports, and Ellen and I will read them and decide whether or not to give them to the advisory committee. If we and the advisory committee believe they are likely to be useful, we will give them to the CIJE. If we decide to release them, we will give local CIJE project directors a chance to react before we finalize the reports.

I think there is a good chance the reports will be useful to the communities. The field researchers see themselves as working to elicit information that will be helpful to community members -- that is the audience they see themselves as addressing. But we have all agreed, as far back as my meeting in Jerusalem last June, that we will not release anything that would be harmful to the implementation. I do not see any need to raise this issue with the field researchers, at least not directly. I think they know I've been pushing for reports so that we can make a contribution.

It would be helpful to know what steps are contemplated to expand the implementation of the project within the communities. Are you going to go to each community and whoop it up, make a big splash about being a lead community? Are you going to try a softer approach, building a coalition quietly before you try to bring it all together? Or what? This decision will guide the evaluation project to an important extent. Is there any information we can provide you that will help you make this decision? I'd have thought you'd like to know how far the lead community coalition actually extends in each community -- as opposed to how far it appeared to extend in the proposal -- but perhaps you know that already. (I don't, but I haven't been there.) Is there any other information we can pull together that would help you decide on the next step?

I look forward to your reactions -- first, I'd like to know whether I've summarized the main concerns correctly, and second, I'd appreciate any suggestions about what we should do in light of the concerns.

Best,

Adam

Received: by HUJIVMS via NJE (HUyMail-V6j); Tue, 15 Dec 92 12:09 38 +0200 15 Dec 92 10:08:57 GMT UK.AC.ED.ERCVAX; 15 DEC 92 10:08:48 GMT Via: Date: Tue, 15 DEC 92 10:09:02 From: EKJC68@ERCVAX.EDINBURGH.AC.UK To: annette@hujivms Subject: (Annette, could you pass this on to Seymour also? Thanks.) Sender: JANET "EKJC68@UK.AC.EDINBURGH.ERCVAX" <EKJC68@ERCVAX.EDINBURGH.AC.UK> hotrodure

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It would be helpful to know what steps are contemplated to expand the implementation of the project within the communities. Are you going to go to each community and whoop it up, make a big splash about being a lead community? Are you going to try a softer approach, building a coalition quietly before you try to bring it all together? Or what? This decision will guide the evaluation project to an important extent. Is there any information we can provide you that will help you make this decision? I'd have thought you'd like to know how far the lead community coalition actually extends in each community -- as opposed to how far it appeared to extend in the proposal -- but perhaps you know that already. (I don't, but I haven't been there.) Is there any other information we can pull together that would help you

R.

decide on the next step? I look forward to your reactions -- first, I'd like to know whether I've summarized the main concerns correctly, and second, I'd appreciate any suggestions about what we should do in light of the concerns.

Best,

Adam

Date: Sat, 12 Dec 92 19:10 +0200 From: <ANNETTE@HUJIVMS> lo: GOLDRIEB@VUCTRVAX Subject: Re: Visit to the Holy Land Dear Ellen, Chanks for your message -- yes we are on for the telecon with a very much to discuss and to decide. The telecon is being arranged by Ginny Levi at Premier 216-391-8300. [ suggest that the agenda include the following items: update -- primarily what happened at the CIJE and the actual work in the Communties implications -- for the CONTENT of the field research (new questions arise that may be most interesting) implications -- for the January report (with no input ve from the CIJE in the communities the questions you and ADAM raised as to the relevance and timeliness and content of the January report is more urgent than ever CR> to continue: next steps and of course anything else you might want to raise. speak to you soon, innette c Adam Gamoran .s. Jim is here -- taught a class at our new school on Thursday. MAIL-XMIT Option (? for Help): cc illegal option. MAIL-XMIT Option (? for Help): h dit Option (? for help): cc lew address (<CR> to finish): annette@hujivms íe address (<CR> to finish): dit Option (? for help): MAIL-XMIT Option (? for Help): send MAIL-I-JID, Job ID is 1301 MAIL-I-SENT, Message sent ave message on filename: MAIL> select bmail 'older does not exist MAIL> select mai UyMail: Delivered SMTP mail for EKJC68@ERCVAX.EDINBURGH.AC.UK MAIL> select mail urrent folder is mail, 4 messages selected SMAIL> .9:13:20 New BITnet file from ANNETTE@HUJIVMS to annette@hujivms MAIL> UyMail: Delivered local mail to annette@hujivms MAIL> ANNETTE@HUJIVMS => annette@hujivms; 12/11/92, 16:41:40; \* ANNETTE.MAIL ASCII (<ANNETTE@HUJIVMS>) IME type: text/plain

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While the advisory committee is reading the draft reports, Ellen and I will

be writing a summary report for CIJE. This report will not only summari the three l.c. reports, it may also give comparative information, evalua the l.c. efforts, and take stock of CIJE's progress. It is intended for you, Art, and the CIJE Board subcommittee on evaluation.



FACSIMILE TRANSMISSION		CENTRE for EDUCATIONAL SOCIOLOGY Department of Sociology
то	: Annetle Hochstein	The University of Edinburgh 7 Buccleuch Place
FAX NO	:010-972-2-619951	Edinburgh EH\$ 9LW Scotland
FROM	: Adam Gamoran	Fux L(K (0)31 664 3263 Emai} €€5@uk.as edinburgh
DATE	: 16 November 1992	Telephone UK (0)31 650 2000 or direct dial UK (0)31 650 4386/4387
PAGES	: (including top sheet) /9	

# NOTES :

Annette, Attached are the interview questions plus my response, which I've heard is being incorporated. Interviewing begins today in Milwarkee! Note that not all respondents receive all questions — my s-mmary at the and op my letter ("Implications") has been adopted.

AJAM

P.S. sorry this didit amore by mail. Hope you ran read it! Have a good trip,

FAX NUMBER FOR REPLY +31 668 3263.

PLEASE TELEPHONE +31 650 4186/4187 IF THERE ARE ANY PROBLEMS WITH THE RECEIPT OF THIS DOCUMENT.



CENTRE for EDUCATIONAL SOCIOLOGY Department of Sociology

> The University of Edinburgh 7 Burcleuch Place Filinhurgh FH8 9LW Scotland

Fax UK (0)31 668 3263 Email CES@uk.ac.edinburgh Telephune UK (0)31 630 1000 or direct dial UK (0)31 650 4186/4187

November 6, 1992

Dr. julie Tammivaara Somewhere in America

Dear Julle,

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

# Background questions

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

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

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

# Preparation and mobilization

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

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

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

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

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

-Do you anticipate benefits for the community as a whole?

-Do you anticipate benefits for specific institutions within the community?

-Do you anticipate benefits for American Jewish education outside this community?

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

# Professional lives of educators

I think these questions are superb.

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

# Implications of my comments

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

(1) Everybody gets asked the background questions. In addition:

(2) People involved with the CIJE lead community process get the preparation/mobilization questions; and

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

How does this fit with your plans?

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

Best,

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a,

Adam

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

FAMILY					
Date of Birth:	_Place of Birth: (Continent, Region, Nearest large city)				
Religious Denomination:	Congregational Affiliation:				
Profession:					
Siblings: (Name, Gender, Birth Order, Religious Denomination)					
······································					
Parents: (Name; Biologica)	i, Step, or Fictive; Religious Denomination)				
Marital Status:					
Never marriedNarried					
If married, widowed, or divorced, name, origin, and religion of spouse(s):					
lst					
2nd					
3rd					
Children: (Name, Gender, Status [biological, step, adopted]), Religion)					
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Region:	Paternal side	
		·····
	Maternal side	······································
		, 
Approximate date of immigration to USA:	Paternal side	
	Maternal side	· • • • • • • • • • • • • • • • • • • •
Religious Practice:	Pesach Chanukah c Shabot can Kashrut Shomer Sha	dles
EDUCATION		
Formal: (Place, Type,	Number of Years)	
Pre-School:		
		······································
High School:		
College:		
correge:		
COTTEGE:		·····
COllege:		
	ation, Trade Scho	ool, Religious Instruction, etc.)
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	icipation in non-role Jewish activities: (Note type, level, when)
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	icipation in non-Jewish activities (current):
	How would you describe the Jewish community in (name of city) to friend who lives far away? What are the biggest pleasures you derive from this Jewish
	How would you describe the Jewish community in (name of city) to friend who lives far away?
2.	How would you describe the Jewish community in (name of city) to friend who lives far away? What are the biggest pleasures you derive from this Jewish
2. 3.	How would you describe the Jewish community in (name of city) to friend who lives far away? What are the biggest pleasures you derive from this Jewish community?
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2. 3. 4.	How would you describe the Jewish community in (name of city) to friend who lives far away? What are the biggest pleasures you derive from this Jewish community? What are some challenges facing this Jewish community? Think for a moment about Jewish education in (name of city). a. Including all forms of education for all ages of individuals, which is strongest in (name of city)?
2. 3. 4.	<ul> <li>How would you describe the Jewish community in (name of city) to friend who lives far away?</li> <li>What are the biggest pleasures you derive from this Jewish community?</li> <li>What are some challenges facing this Jewish community?</li> <li>Think for a moment about Jewish education in (name of city).</li> <li>a. Including all forms of education for all ages of individuals, which is strongest in (name of city)?</li> <li>b. Which is most in need of attention?</li> </ul>
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General Concerns:

Family:

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

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

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

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

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

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

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

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

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

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

Roberta Goodman Claire Rottenberg Julie Tammivaara Questions for Jowish Educators 20 August 1992 edited 11 October 1992

# PREPARATION AND MOBILIZATION

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

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

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

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

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

What advice did you receive from those you consulted?

- 6. How has your idea of this project changed from when you first heard of it to the present?
- 7. What were the biggest challenges to getting the proposal prepared?

8. Who took the major roles in preparing the proposal?

9. Who planned the presentation to the site visiting team? Were there objections to the way it was planned? If so, what were they?

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- 10. One of the aims of the CIJE is to work with a full coalition of representatives of the Jewish community. What different groups became involved and how was their participation assured?
- 11. Are there any groups not involved in (name of community)'s partnership with the CIJE? If so, who are they and why have they chosen not to become involved?

Realistically, do you see any chance of them becoming involved at a later time?

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

Of what importance is Israel in your life? (Probe: level of support, support based on religious vs. national survival, etc.)

- 10. What are the major challenges facing Java in (name of community)?
- 19. What are the major threats to Jews nationally and internationally?
- 20. In what ways are you prepared to support Jewish education? In what other ways must it be supported?
- 21. What signs would indicate to you that Jewish education was improving in (name of community)?
- 21. What would inspire you to become even more involved in Jewish education?
- 22. Many adults criticize their early Jewish education. Why do you think this is so?
- 23. Who is not reached by your community's efforts to increase involvement?

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24. Who chooses not to become involved? Why?

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- 25. Who shapes policy and funding decisions about Jewish education?
- 26. Who should be given or take a bigger role in Jewish education in (name of community)?

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

Julie Tammivaara

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Roberta Goodman Claire Rottenberg Julie Tammivaara

11 October 1992

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### PROFESSIONAL LIVES OF EDUCATORS

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

#### Recruitment

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

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

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

### Socialization.

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

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

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

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11. Since we are talking about time, I wonder if you could give me a rough picture of how you distribute your time during a typical school week?

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

How do you distribute your time between:

1.	Actual classroom teaching	
2.	Preparation for class such as lesson planning, setting up equipment, etc.	<u></u>
з.	Routine paper work and marking papers	
4.	Seeing students individually	
5.	Talking with parents	
6,	Neetings	

7. Other--specify

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12. How much time, including weekends, do you spend preparing for school at home during the average week?

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

### Rewards

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

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

Of those you have mentioned, which do you feel is the most important satisfaction?

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

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

### Purpose

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

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

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

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What is most important?

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

What is most important?

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

Which would be your second choice? Why?

### Discontent.

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

1. What little things irritate you in your work?

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

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#### Sentiments

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

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

#### Interpersonal Preferences

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

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

b. How are educators as a group perceived by others?

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- c. How do others show they respect (or do not respect) you?
- 7. Do you ever work together with other teachers on lessons? If yes, describe how this work is done?
- 8. Do you prefer to work alone or with other teachers?

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- 9. What, in your opinion, makes someone a good "fellow teacher?"
- 10. Some people think that a school should be operated like a well-run business where everyone's responsibility is clearly stated and the lines of authority are sharp. Others think that schools should be organized loosely and that relationships among members of the staff should tend toward equality. Which of these two views is closer to yours? Why?
- 11. What do you consider to be the major responsibilities of the school director toward you?
- 12. What do you consider your major responsibilities to the school director?
- 13. What questions would you ask a school director if you were to seek a position at a new school?

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

Julie Tammivaara

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<EKJC68@ERCVAX.EDINBURGH.AC.UK>

/CIJE Evaluation Project

ADAN

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COMMENTS WELCOME

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The first reports from the monitoring, evaluation, and feedback project are due at the end of January, 1993. The reports, one for each community, will be based on initial visits to the communities during November-December 1992. Each local CIJE director will receive the report on his/her rommunity, and the field researchers will be available to

esent relevant portions of the reports orally to appropriate groups within the communities. A summary report will also be prepared for the CIJE staff and board subcommittee on evaluation.

What will the reports contain? The task of the evaluation project during the CIJE's first year is to monitor the process

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&#Hbecoming a lead community, with attention to emerging visions of Jewish education, and a focus on the "enabling elements" described in A Time to Act: community mobilization, and the professional lives of educators. The reports will serve as "mirrors" to the community, displaying the current state of Jewish education and the ongoing efforts to improve it. The first reports will be primarily descriptive rather than analytic, and we anticipate discussion of the following areas:

Description of the community and its education system

(1) The community as a whole: What is the character of this Jewish community? What do some of its leaders perceive as important strengths and resources upon which to build?

(2) Education system: What is the structure of Jewish education in this community? What institutions are involved, and, roughly, what is the nature of their personnel?

Becoming a lead community (1) Preparation: What motivated participants to become

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2dWolved in the lead community proposal? What did/do they hope to gain--for their own communities, and for American Jewry more generally? Who was involved in the proposalwriting process? How, if at all, has participation in the local CIJE effort changed since then? What does the concept of a "lead community" mean to members of this community?

, Mobilization: Who is presently involved in the community's CIJE effort? Who is not involved? What role do educators play in the CIJE, and/or what role is envisioned for them? To what extent are diverse groups represented in the local CIJE efforts? What attempts are underway to broaden financial support for Jewish education?

(3) Visions: Who in the community has given thought to goals for Jewish education? What programs are envisioned or newly established? What is the diversity of views about the desired future of Jewish education in this community? To what extent are these views seen as attainable?

Challenges to the community

Hit <CR> for next page, : to skip to next part... BMAIL> ZBHs section will focus on issues that emerge as key challenges to the efforts to establish a broad-based planning pcess for community-wide improvement of Jewish education. For example, the need to develop visions for Jewish education, or to draw educators into the local CIJE effort, might turn out to be important issues. This section is based on the premise that the CIJE lead communities project is more than "just another project;" its goal is fundamental, systemic invigoration of Jewish education in these communities and, ultimately, throughout North America. 8MAIL> Current message filed in MAIL folder Message #1 was deleted. BMAIL> reply No current message BMAIL> select mail Current folder is mail, 2 messages selected BMAIL> select Current folder is MANDEL, 3 messages selected BMAIL> dir 2JH => MANDEL <= From Size Fmt L FileN Subject # Date 

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[ 21 12 5

So far so good. We will respond as soon as we receive the materials. At that time we will also decide about the agenda of the meetings -- or rather about the place of the project in those meetings. I foresee them as very very heavy meetings - and we will need to prioritise. They may or may not be the pest forum for dicussion of the report format. The basic issue of reporting will certainly be brought up.

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Best Regards,

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?JH1 ANNETTE@HUJIVMS => annette@hujivms; 11/11/92, 18:14:48; \* ANNETTE.MAIL ASCII (<ANNETTE@HUJIVMS>) ImMIME type: text/plain Acceived: by HUJIVMS (HUyMail-V6j); Wed, 11 Nov 92 18:14:48 +0200 )ate: Wed, 11 Nov 92 18:09 +0200 From: <ANNETTE@HUJIVMS> fo: shapley@cns.nyu.edu (Bob Shapley) :c: annette@hujivms Subject: Re: Visit Jear Bob. lust lost a bet: Shaul is sitting by me, saying that of course there would be an answer one hour later... lust say that to my conservative self, this is really incredible. In fact, I would probably deny it happened io, if it is indeed possible, Tuesday evening would be 'vely. lit <CR> for next page, : to skip to next part... SMAIL> 18H two of us send you all warm regards, innette MAIL> urrent message filed in MAIL folder 'JH2 ANNETTE@HUJIVMS => annette@hujivms; 11/11/92, 18:16:34; \* ANNETTE.MAIL ASCII (<ANNETTE@HUJIVMS>) mMIME type: text/plain leceived: by HUJIVMS (HUyMail-V6j); Wed, 11 Nov 92 18:16:34 +0200 late: Wed, 11 Nov 92 18:14 +0200 <ANNETTE@HUJIVMS> rom: EKJC68@ERCVAX.EDINBURGH.AC.UK 0: C: annette@huiivms ubject: Re: conference call 'hat about Sunday early evening-late afternoon? fear we'll fall asleep on an evening call (19th) fter the long day cum jet-lag. Morning will be y first conversation with Ellen -- and I think it is mportant. Lease let me know. Any time thanksgiving week-end not shabbat) will also do. it <CR> for next page, : to skip to next part... MAIL> move Gamoran MAIL> JH3 shapley@cns.nyu.edu => ANNETTE@vms.huji.ac.il; 11/11/92, 18:43:46; \* SMTP.MAIL ASCII (shapley@cns.nyu.edu (Bob Shapley)) mMIME type: text/plain eceived: by HUJIVMS via SMTP(192.76.177.18) (HUyMail-V6j); Wed, 11 Nov 92 18:43:46 +0200 eceived: from WOTAN.CNS.NYU.EDU by cmc12.NYU.EDU (5.61/1.34)

Received: by HUJIVMS via NJE (HUyMail-V6j); Wed, 11 Nov 92 16:23:13 +0200 11 Nov 92 14:21:57 GMT Received: from RL.IB by UK.AC.RL.IB (Mailer R2.07) with BSMTP id 4993; Wed, 11 Nov 92 14:21:57 GMT Via: UK.AC.ED.ERCVAX; 11 NOV 92 14:21:54 GMT Date: Wed, 11 NOV 92 14:21:56 From: EKJC68@ERCVAX.EDINBURGH.AC.UK To: annette@hujivms Subject: meeting on the 23/24 Sender: JANET "EKJC68@UK.AC.EDINBURGH.ERCVAX" <EKJC68@ERCVAX.EDINBURGH.AC.UK>

I'm glad it will work out to send a f.r. to the meeting on the 23/24. I am sure any of them would represent the project well. If one must be recommended I suggest Claire since she has been presenting the project ) much lately.

However, let me make one more pitch to send all three field researchers.

First, I made an issue of this a couple of weeks ago so they already think all three of them are going. Second, all three will be visiting all three communities at some times, and it would be good for them to be introduced to the leaders of the other communities. Third, they would just be in the background during the meetings and not speak except to answer questions and to present the project if asked, and then only one of them would present.

P.S. I received a letter from Julie today in which she says they have an appointment to meet with Barry Holtz prior to the meeting on the 23rd-- "an informal get-acquainted session" she calls it. So it looks ike they've already set up their trips. That's my fault--I told them they were going a couple of weeks ago. Received: by HUJIVMS (HUyMail-V6j); Tue, 10 Nov 92 20:28:36 +0200
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To: <a href="https://www.example.com">example.com</a>
To: <a href="https://www.example.com">example.com</a>
Cc: <a href="https://www.example.com">annette@hujivms</a>
Subject: Re: I am planning on faxing the attached to Art today

Dear Adam,

Having tought it over and cleared it with Art, it is fine for one of the f.r.'s to participate in the workshop of Lead COmmunity planners on November 23 and 24.

It was good talking to you -- as always. Take care

Annette

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Cc: annette@hujivms
Subject: Re: I am planning on faxing the attached to Art today

Dear Adam,

In reference to your memos of last week here is a last response: you suggested a conference call with the researchers on November 18. That is not so convenient for us since we will be in the US since the morning of that day - and already at work. Is it possible to reschedule for next Monday the 16th, at 3pm Jerusalem time (8 am New York)? in order to be effective at that conversation could you please either send me new materials or tell me what of the documents I have you plan to discuss.

Art referred your document back to me today -- I'll discuss it with him on the phone and will let you know his response.

Regards,

Annette

P.S. You probably know that we are running two workshops in the US during the next two weeks: a staff meeting on November 19/20, at which Ellen will come, and a 'Ead Communities' seminar with the COmmunity planners on November 23 (evening) and 24 (All day). I believe it would be very good for the project if Ellen could attend that meeting too -- even if only the day part. However before asking her I wonder whether you think it is a Chutspa to ask her to come back so soon after the first meeting - and while the f.r.'s are in the communities. Please advise me.



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November 6, 1992

To: Art Rotman From: Adam Gamoran and Ellen Goldring CC: Evaluation project advisory committee Re: Proposed feedback mechanism for CIJE and lead communities

The purpose of this memo is to propose a system for distributing and disseminating the quarterly reports prepared by our field researchers. We offer it now for your approval, with the suggestion that you present it for discussion to members of the lead communities, so they can have some input regarding the form and content of the quarterly reports.

The memo describes the distribution of quarterly reports, with each community receiving its own report. In addition, we mention a summary report. The summary report is intended for the CIJE administration (and, at your discretion, for the board subcommittee on evaluation). It will contain comparative information about the three communities, as well as an overall assessment of the CIJE's progress.

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TO ANNITIE HOCHSTEIN	From ART ROTMAN
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# Proposed feedback mechanism in lead communities

The field researchers are expected to prepare quarterly reports on their findings in lead communities. During the first year, the reports will document the state of Jewish education in the three communities, with particular reference to visions for change, mobilization of the communities, and the professional lives of educators. (These reports will presumably be complemented by local self-studies addressing participation rates and other quantitative indicators.) Especially in the first quarterly report, the field researchers will document the process of <u>becoming</u> a lead community, and they will monitor this process throughout the year. Each community's report will reflect the particular pace and direction of planning within that community.

#### Preparation and dissemination

The field researchers, with input from the director and associate director of evaluation and their advisory committee, will produce a first set of reports on the lead communities by the end of January.

The January reports will be delivered to Art Rotman, the Director of the CIJE. He will send each community's report to the respective local project directors. In a cover letter, he will offer to have our field researchers provide one or more oral presentations to professional and/or lay leaders (at the discretion of the local project director) based on the portlons of the report that are appropriate for wider dissemination. Each community will receive only its own report.

In addition, the evaluation staff (director, associate director, and field researchers) will prepare a summary report. The summary report will include comparative information about the three communities, and an assessment of CIJE progress to date. This report will be delivered to Art Rotman, who may wish to share it with the CIJE Board subcommittee on evaluation.

Subsequent quarterly reports will be disseminated in the same manner, subject to modification based on our experience in January.

# Content of the first report

The first report must document the process of becoming a lead community. It must reveal the critical issues facing the lead communities as they attempt to mobilize and invigorate their systems of Jewish education. Examples of possible issues are:

- -- mobilization and cooperation among various groups within lead communities, e.g. federation professional and lay leaders
- -- achieving consensus within communities about what it means to be a "lead community"
  - -- bringing educators into the lead community process
  - -- getting community members to express visions for Jewish education



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November 6, 1992

Dr. Julie Tammivaara Somewhere in America

Dear Julie,

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

Background questions

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

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

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

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

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

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

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

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

-Do you anticipate benefits for the community as a whole?

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

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

Professional lives of educators I think these questions are superb.

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

# Implications of my comments

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

(1) Everybody gets asked the background questions. In addition:

(2) People involved with the CIJE lead community process get the preparation/mobilization questions; and

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

How does this fit with your plans?

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

Best,

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Adam

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

		COUNCIL FOR INITIATIVES (UP IN JEWISH EDUCATION
LEAD COM	MUNITIES PROJECT Mailing A	tel: (212) 532-1961 · fax: (212) 213-4078
ANNETTE HOLA	IP-re-	ere 1001 Uni
эт. ж	Phone # Fax #	October 21, 1992 fur
, Dear Mr.		OF UNDERSTANDING I did sory it

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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."<sup>7, 8</sup>

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.

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

<sup>&</sup>lt;sup>8</sup> See also Lead Communities: Program Guidelines (January, 1992) pp. 7-11.

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

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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.<sup>9</sup>

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.

<sup>&</sup>lt;sup>9</sup> See Appendix A for a brief description of some of the possible areas of content of a Lead Communities Plan.

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- 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.
- Coavene 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, (c.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.

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Page

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- 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
Ву:	By:
Title: Date:	Title: 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)

BACKGROUND	QUESTIONS

. .

	Place of Birth: (Continent, Region, Nearest large city)
Religious Denomination:	Congregational Affiliation:
Siblings: (Name, Gender,	Birth Order, Religious Denomination)
	RICAN JEWISH
Parents: (Name; Biologic	cal, Step, or Fictive; Religious Denominatio
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Marital Status:	
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	DivorcedWidowed
Never marriedMarried	DivorcedWidowed vorced, name, origin, and religion of
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Region:	Paternal	side			
	Maternal	side	· · · · · · · · · · · · · · · · · · ·		
Approximate date of immigration to USA:	Paternal	side			
	Maternal	side			
Religious Practice:				7	
	Chi Shi Ka	sach anukah can abot cand shrut omer Shabo	les	_	
EDUCATION			V 5 7		
Formal: (Place, Type,	Number of	Years)			
Pre-School:		<u></u>	14	_	
Grammar School:			1	1	
	1	1		<u> </u>	
High School:	<u>85.</u>	-	27		
College:		V.			
Informal: (Adult Educ					ction, etc.)

\*

COMMUN	I	T	Y
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If relevant, Current Role: (Note whether professional or lay, time in role, circumstances of entering)

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

General Concerns:

Family:

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

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

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

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

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

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

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

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

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

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



Roberta Goodman Claire Rottenberg Julie Tammivaara

Questions for Jewish Educators

20 August 1992 edited 11 October 1992

#### PREPARATION AND MOBILIZATION

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

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

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

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

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

What advice did you receive from those you consulted?

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

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

Realistically, do you see any chance of them becoming involved at a later time?

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

Of what importance is Israel in your life? (Probe: level of support, support based on religious vs. national survival, etc.)

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

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

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

Julie Tammivaara



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Roberta Goodman Claire Rottenberg Julie Tammivaara

11 October 1992

### PROFESSIONAL LIVES OF EDUCATORS

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

#### Recruitment

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

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

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

## Socialization.

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

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

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

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

How do you distribute your time between:

- 1. Actual classroom teaching
- Preparation for class such as lesson planning, setting up equipment, etc.
- 3. Routine paper work and marking papers
- 4. Seeing students individually
- 5. Talking with parents
- 6. Meetings

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- 7. Other--specify
- 12. How much time, including weekends, do you spend preparing for school at home during the average week?

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

#### Rewards

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

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

Of those you have mentioned, which do you feel is the most important satisfaction?

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

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

#### Purpose

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

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

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

What is most important?

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

What is most important?

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

Which would be your second choice? Why?

#### Discontent.

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

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

#### Sentiments

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

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

Interpersonal Preferences

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

- 1. How many parents, on the average, do you see in a month?
- 2. For what reasons do you seek to meet with parents?
- 3. For what reasons do parents seek to meet with you?
- 4. Would you like to meet with parents more or less often? Why?
- 5. What, from your point of view as a teacher, makes a "good" parent?
- 6. Think for a moment about your fellow educators.

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- a. When and where do you interact with them? (*Probe*: singly or in groups)
- b. How are educators as a group perceived by others?

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- c. How do others show they respect (or do not respect) you?
- 7. Do you ever work together with other teachers on lessons? If yes, describe how this work is done?
- 8. Do you prefer to work alone or with other teachers?

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- 9. What, in your opinion, makes someone a good fellow teacher?"
- 10. Some people think that a school should be operated like a well-run business where everyone's responsibility is clearly stated and the lines of authority are sharp. Others think that schools should be organized loosely and that relationships among members of the staff should tend toward equality. Which of these two views is closer to yours? Why?
- 11. What do you consider to be the major responsibilities of the school director toward you?
- 12. What do you consider your major responsibilities to the school director?
- 13. What questions would you ask a school director if you were to seek a position at a new school?

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

Julie Tammivaara



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This is a draft on reporting to load communities. I look forward to your comments. Place distribute to seymour + to Mike Infan as well.

Thanks, Adam

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DIRECTORS Andrew Methonson David Raffe



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October 15, 1992

To: CIJE Evaluation Project Advisory Committee From: Adam Gamoran CC: Ellen Goldring Re: reporting on load communities

As you know, three lead communities have now been selected: Atlanta, Baltimore, and Milwaukee. In the course of their introductions to the communities, the field researchers have been asked what sort of feedback or reporting they will provide to the communities, and we have not yet given them a satisfactory answer. I'm writing to ask your advice on a reporting system which I would like to propose. Any comments you can provide would be most appreciated. You can respond to me directly, or to me through Annette Hochstein.

Thanks very much.

Proposed feedback mechanism in lead communities

The field researchers are expected to prepare quarterly reports on their findings in lead communities. During the first year, the reports will document the state of Jewish education in the three communities, with particular reference to visions for change, mobilization of the communities, and the professional lives of educators. (These reports will presumably be complemented by local self-studies addressing participation rates and other quantitative indicators.) Especially in the first quarterly report, the field researchers will document the process of <u>becoming</u> a lead community, and they will monitor this process throughout the year.

What will happen to these reports? Who will receive them? How will they be disseminated? What, more specifically, will they contain? I propose the following:

#### Preparation and dissemination

The field researchers, with input from Adam, Ellen, and the advisory committee, will produce a first set of reports on the lead communities by the end of January.

After review by our advisory committee, the January reports will be delivered to Art Rotman, the Director of the CIJE. He will send each community's report to the respective local project directors. In a cover letter, he will offer to have our field researchers provide one or more oral presentations to professional and/or lay leaders (at the discretion of the local project director) based on the portions of the report that are appropriate for wider dissemination.

Communities will not receive reports on the other communities. However, each report will have a section on experiences in the other communities that are relevant for their own efforts.

Art may also present all three reports to the CIJE board subcommittee for evaluation. Alternatively, he may ask for a summary report based on the three reports.

Subsequent quarterly reports will be disseminated in the same manner, subject to modification based on our experience in January.

#### Content of the first report

The first report must document the process of becoming a lead community. It must reveal the critical issues facing the CIJE as it attempts to create lead communities in Atlanta, Baltimore, and Milwaukee. These issues may include:

- -- educating federation lay and professional leaders about the concept of
- a lead community (so far, community members and CIJE staff do not seem to share the same idea of what a lead community is)

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- --- bringing federation professional and lay leaders together (early indications show important divisions between these groups in the lead communities)
- getting educators involved (where are the educators in the load community coalitions?)
- -- getting community members to express visions for Jewish education

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September 9, 1992

Dr. Julie Tammivaara South 4319 Miami Spokane, WA 99223

Dear Julie,

I was so pleased to receive your letter with the draft of the interview questions. I think the team is making <u>excellent</u> progress. I've taken a few extra days to respond since you've given me a lot to respond to!

I'd like to raise three general issues, and then a few specific points about each section:

### GENERAL QUESTIONS

(1) All three lists of questions are termed "Questions for Jewish Educators." Yet questions about vision and about mobilization need to be asked of a broader set of respondents, including professional and lay leaders in communal organizations, parents/ congregants, members of JCC's, perhaps unaffiliated Jews, etc. How will you handle these different audiences? Will you develop separate protocols for each category? I'm sure that many of the same questions can be asked of different types of persons, but some questions might be more appropriate for educators than for other respondents. Particularly in the questions about vision, we need to think about varied ways of approaching the subject.

Perhaps we should step back and lay out the possible different categories of interviewees. These might be:

professional educators (mainly teachers and principals) rabbis (who are educators to varying degrees) students (would need to limit this: e.g. secondary only?) parents of students congregants who are not parents --especially lay leaders of congregations JCC members professional leaders of communal organizations (eg, Fed, JCC) lay leaders of communal organizations persons unaffiliated with congregations and JCC's I want to raise some questions about this list. First, what have I left out? Second, how are we going to prioritize conducting interviews with persons in these groups? Will we omit some of them? Which ones? Third, how will the interview questions be modified for these groups of respondents?

As a first cut, let me go back to the methods section of my "tentative plan" which I presented in August. I listed three starting points from which we would snowball outward:

- (1) Key actors involved in the l.c. proposal
- (2) Leaders of community organizations involved in education
- (3) Random samples of lay persons not included in (1) or (2)

If we follow this plan, we would first need interview questions for professional and lay leaders of communal organizations, professional educators and rabbis, and lay leaders of congregations. (Perhaps lay leaders of communal organizations could have the same interview questions as lay leaders of congregations.) This plan gives lower priority to interviewing students.

This discussion leads me to conclude that you will need three versions of the questions about vision, and possibly mobilization:

- (a) questions for educators
- (b) questions for other professionals

(c) questions for lay persons, including leaders of communal organizations and of congregations, parents, etc.

Time permitting, there could be a fourth version of the questions about vision for students.

How does this sound to you? I'd be happy to hear about alternative approaches. I'm sure there will be a lot of overlap among these versions of the questions--perhaps the main difference would be in the way you introduce the questions.

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Unlike the other sections, these questions are clearly intended only for educators. Questions for non-educators about the professional lives of educators would come under vision.

At the beginning of this section (or elsewhere), we need to establish some basic background information such as how much they teach/administer, what their subjects are if they are teachers, how long they've been Jewish educators, etc.

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cc: Roberta, Claire, Ellen, Annette

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Questions for Jewish Educators

20 August 1992

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- 1. What is the purpose of Jewish education?
- Describe changes you have seen in Jewish education over the years.
  - a. What beliefs have been confirmed?b. What beliefs have been challenged?
- What is your vision of Jewish education? (Probe for specifics in organization, process, outcome, clients, etc.)
- 4. How shared is your vision with others?
- 5. Who does not share your vision? Why?
- 6. What is needed to realize your vision?
- Realistically, what could be achieved in the next five years or so?
- Who and what are your sources of influence? (Probe: reading, talking, workshops, courses, etc.)
- 9. What are two or three Jewish precepts that have guided you?
- What are some important precepts that particularly apply to Jewish education or schooling? (Probe: give some alternatives.)

Roberta Goodman Claire Rottenberg Julie Tammivaara

Questions for Jewish Educators

20 August 1992

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- 1. Who is involved in the process?
- Who is the "driver?"

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- 3. What has been done to get people involved in Jewish life in your community?
- What would you like to see done? (Alternative: What should have been done?)
- 5. How do strategies differ for different categories of people? (For example, families with young children, families with grown children, families with no children, singles, intermarried couples, etc.)
- 6. In what ways do you feel connected to the Jewish community?
- 7. When do you (or in what ways do you) feel alienated from the Jewish community? (*Probe*: What makes you proud/ashamed of the community?)
- 8. What does Israel mean to you? (Get at unconditional versus conditional support issue, religious vs. national issue, etc.)
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- 10. What constitutes support for Jewish education? (Probe: resources, people, attitudes, etc.)
- 11. What signs would indicate to you things were improving in Jewish education?
- 12. What would inspire you to become even more involved in Jewish education?
- 13. Many adults criticize their early Jewish education. Why do you think this is so?

- 14. Who is not reached by your community's efforts to increase involvement?
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Questions for Jewish Educators

20 August 1992

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- 2. What were the main attractions the job held for you?
- 3. What people were influential in your decision to become an educator? (*Probe*: Family, Friends, Other Educators, Others?)
- 4. Thinking back to when you decided to become an educator... What qualities did you possess that you thought suited you to this work?
- 5. In what ways is your work different from what you expected when you began as an educator?
- Tell me about your formal schooling.
  - a. Grammar school
  - b. High school
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- d. Non-formal training
- 7. How long have you held your current position?
- 8. What positions (and for how long) did you hold before this one? (Affirm non-paying, non-institutional work.)
- 9. How many other educators work with you?
- 10. How long have each of them held their current position?
- 11. Imagine you were having a conversation with a prospective educator. How would you describe what you do? (*Probe*: frustrations and benefits of work as well as content.)
- 12. What would you tell prospective students and parents about your educational program?
- 13. Think for a moment about your fellow educators.

 When and where do you interact with them? (*Probe*: singly or in groups)

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- b. How are educators as a group perceived by others?
- c. How do others show they respect (or do not respect) you?
- 14. What salary and/or benefits do you receive?
- 15. Looking ahead, what career opportunities do you see for yourself?
- 16. What career opportunities would you like to see made available to you?
- 17. What opportunities for professional growth (workshops, college courses, conferences, etc.) have you had?
- 18. In what areas of your work do you feel powerful? Not so powerful? (*Probe*: explain in detail)
- 19. Thinking back on your own Jewish education, describe a really wonderful teacher you had.
- 20. Describe a teacher who was not so wonderful.
- 21. How do lay people assist you in your work?
- 22. How should they be assisting you?
- 23. As you think about your work, what do you see as the main purpose(s) of Jewish education?
- 24. How would you like to see your students changed or transformed as a result of your teaching?
- 25. Describe a model 40-year-old Jewish person. (Allow for multiple descriptions.)
- 26. What changes have you effected in the structure of your educational program?
- 27. What circumstances would cause you to leave your position?
- 28. When was the last time you were tempted to leave? (*Probe*: What were specific circumstances? What happened?)
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tenitating questions:



CENTRE for EDUCATIONAL SOCIOLOGY Department of Sociology

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September 9, 1992

Dr. Julie Tammivaara South 4319 Miami Spokane, WA 99223

Dear Julie,

I was so pleased to receive your letter with the draft of the interview questions. I think the team is making <u>excellent</u> progress. I've taken a few extra days to respond since you've given me a lot to respond to!

I'd like to raise three general issues, and then a few specific points about each section:

# GENERAL QUESTIONS

(1) All three lists of questions are termed "Questions for Jewish Educators." Yet questions about vision and about mobilization need to be asked of a broader set of respondents, including professional and lay leaders in communal organizations, parents/ congregants, members of JCC's, perhaps unaffiliated Jews, etc. How will you handle these different audiences? Will you develop separate protocols for each category? I'm sure that many of the same questions can be asked of different types of persons, but some questions might be more appropriate for educators than for other respondents. Particularly in the questions about vision, we need to think about varied ways of approaching the subject.

Perhaps we should step back and lay out the possible different categories of interviewees. These might be:

professional educators (mainly teachers and principals) rabbis (who are educators to varying degrees) students (would need to limit this: e.g. secondary only?) parents of students congregants who are not parents --especially lay leaders of congregations JCC members professional leaders of communal organizations (eg, Fed, JCC) lay leaders of communal organizations persons unaffiliated with congregations and ICC's I want to raise some questions about this list. First, what have I left out? Second, how are we going to prioritize conducting interviews with persons in these groups? Will we omit some of them? Which ones? Third, how will the interview questions be modified for these groups of respondents?

As a first cut, let me go back to the methods section of my "tentative plan" which I presented in August. I listed three starting points from which we would snowball outward:

- (1) Key actors involved in the l.c. proposal
- (2) Leaders of community organizations involved in education
- (3) Random samples of lay persons not included in (1) or (2)

If we follow this plan, we would first need interview questions for professional and lay leaders of communal organizations, professional educators and rabbis, and lay leaders of congregations. (Perhaps lay leaders of communal organizations could have the same interview questions as lay leaders of congregations.) This plan gives lower priority to interviewing students.

This discussion leads me to conclude that you will need three versions of the questions about vision, and possibly mobilization:

- (a) questions for educators
- (b) questions for other professionals

(c) questions for lay persons, including leaders of communal organizations and of congregations, parents, etc.

Time permitting, there could be a fourth version of the questions about vision for students.

How does this sound to you? I'd be happy to hear about alternative approaches. I'm sure there will be a lot of overlap among these versions of the questions--perhaps the main difference would be in the way you introduce the questions.

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(a) Ask only the visions questions in the Nov.-Dec. visits. In the Jan.-Apr. visits, ask the mobilization and professionalism questions of persons interviewed previously, and ask the visions questions of a broader sample. In the May-June visits, ask again about visions and mobilization (to monitor changes), and ask about professionalism from a broader sample.

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- 31. What resource materials are available to you?
- 32. How is curriculum chosen? Modified?

33. How has status of Jewish educators changed since you became involved either as a student or teacher?

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# Monitoring, Evaluation, and Feedback in Lead Communities – Tentative Plan of Work for 1992-93

# I. CONTENT

For lead communities, 1992-93 will be a planning year. The agenda for the evaluation project is to raise questions that will (a) stimulate and assist the planning process; (h) enumerate the goals that lead communities intend to address; and (c) identify current practice so that progress towards goals can be assessed in the future. Broadly, the field researchers will raise three questions:

- (1) What are the visions for change in Jewish education held by members of the communities? How do the visions vary across different individuals or segments of the community? How vague or specific are these visions? To what extent do these visions crystallize over the course of the planning year (1992-1993)?
- (2) What is the extent of community mobilization for Jewish education? Who is involved, and who is not? How broad is the coalition supporting the CIJE's efforts? How deep is participation within the various agencies? For example, beyond a small core of leaders, is there grass-roots involvement in the community? To what extent is the community mobilized financially as well as in manpower?
- (3) What is the nature of the professional life of educators in this community? Under what conditions do teachers and principals work? For example, what are their salaries, and their degree of satisfaction with salaries? Are school faculties cohesive, or fragmented? Do principals have offices? What are the physical conditions of classrooms? Is there administrative support for innovation among teachers?

Visions of reform. The issue of goals was not addressed in *A Time to Act*. The commission report never specified what changes should occur as a result of improving Jewish education, beyond the most general aim of Jewish continuity. Specifying goals is a challenging enterprise given the diversity within the Jewish community. Nonetheless, the lead communities project cannot advance – and it certainly cannot be evaluated – without a compilation of the desired outcomes.

For purposes of the evaluation project, we will take goals to mean outcomes that are desired within the lead communities. We anticipate uncovering multiple goals, and we expect persons in different segments of the community to hold different and sometimes conflicting preferences. Our aim is not to adjudicate among competing goals, but to uncover and spell out the visions for change that are held across the community. To some extent, goals that emerge in lead communities will be clearly stated by participants. Other goals, however, will be implicit in plans and projects, and the evaluation team will need to tease them out. The evaluation project will consider both short-term and long-term goals.

Another reason for focusing on visions is that a lack of clear goals has hindered the success of many previous reform efforts in general education. For example, the New Futures Initiative, an effort by the Casey Foundation to invigorate educational and community services in four inner-city communities, was frustrated by poor articulation between broad goals and specific programs. Although the communities were mobilized for reform, the connections between community leaders and front-line educators did not promote far-reaching programs for fundamental changes. New programs were generally supplemental, and they tended to produce superficial changes.

Questions related to visions include asking about anticipated obstacles, about overcoming harriers between segments of the Jewish community, and about how participants foresee moving from goals to implementation. By asking questions about visions, the evaluation project will not only document goals, but will help persons at all levels of the lead communities project – lay leaders, parents, educators, and other Jewish professionals – to think about their visions of the future. This process may lead to interactive thinking about goals, and may help the communities avoid purely top-down or bottom-up strategies.

It will be important to consider the concreteness of the visions in each community. Do the visions include a concept of implementation, or do ideas about goals remain abstract? Do participants recognize a link between their visions of change and the structure they have established to bring about change?

Community mobilization. According to *A Time to Act*, mobilizing community support for Jewish education is a "building block" of the lead communities project, a condition that is essential to the success of the endeavor. This involves recruiting lay leaders and educating them about the importance of education, as well as increasing the financial resources that are committed to education. The Report quotes one commissioner as saying, "The challenge is that by the year 2000, the vast majority of these community leaders should see education as a burning issue and the rest should at least think it is important. When this is achieved ... money will be available to finance fully the massive program envisioned by the Commission (p. 64)."

Recent advances in educational theory also emphasize the importance of community-wide, "systemic" reform instead of innovations in isolated programs. Educational change is more likely to succeed, according to this view, when it occurs in a broad, supportive context, and when there is widespread consensus on the importance of the enterprise. Hence, an important issue for the evaluation of lead communities is the breadth and depth of participation in the project. What formal and informal linkages exist among the various agencies of the community? Which agencies participate in the visions of change that have been articulated?

As part of their applications lead communities are proposing planning processes for the first year of work. In studying mobilization in the communities, we need to observe how this planning process unfolds. Is the stated design followed? Are departures from initial plans helpful or harmful? Is there broad participation? Are the planners developing thoughtful materials? We will need to describe the decision-making process. Is it open or closed? Are decisions pragmatic or wishful? The professional lives of Jewish educators. Enhancing the profession of Jewish education is the second critical building block specified in *A Time to Act*. The Report claims that fundamental improvement in Jewish education is not possible without radical change in areas such as recruitment, training, salaries, career tracks, and empowerment of educators. Hence, the evaluation project will establish baseline conditions which can serve as standards for comparison in future years.

Field research may center on characteristics and conditions of educators including background and training, salaries, and degree of satisfaction with salaries; school facilities; cohesiveness of school faculties cohesive; administrative support for innovation; and so on. Additionally we will observe a subset of educational programs that are in place as the lead communities project begins. These observations will be used as baseline data for comparative purposes in subsequent years. We will try to consider programs which, according to the visions articulated in the community, seem ripe for change.

# **II. METHODS**

In the long term (e.g., four years?) it is possible to think about quantitative assessment of educational change in lead communities. This assessment would involve limited surveys that would be administered in 1993–94 and repeated perhaps every two years. For the present, the evaluation project will make only limited use of quantitative data, relying mainly on information gathered by the community itself, such as participation rates, trends in funding, teacher turnover, etc. The bulk of the assessment carried out by the evaluation project, at least during the first two years, will emphasize qualitative assessment of the process of change in lead communities. The main methodological tools will be interviews and observations.

Snowball sampling for interviews. A "snowball" technique for selecting interview respondents appears appropriate here. In this approach, the researcher identifies an initial group of respondents, and adds to the list of subjects by asking each interviewee to suggest additional respondents. At some point in an interview, for example, the researcher might ask, "Who else is involved in (program x)? Who else is a leader in this area in this community?" Subsequently, the researcher interviews some of those named hy previous subjects, particularly if new subjects are named by more than one previous informant.

In the snowball approach, it is important to begin with multiple starting points, so that one does not become confined to a narrow clique within the community. We might use the following three starting points from which we would snowball outward:

- (1) Key actors identified in the lead communities proposal from each community.
- (2) A list of leaders of all community organizations that are involved in education, possibly prepared by the head of the local Jewish federation. The list must include leaders of any organizations that are not participating in the lead communities project.
- (3) Random samples of educators and lay persons not included in (1) or (2).

These samples should clarify the social ecology of the Jewish community.

Aims of evaluation. The purpose of the evaluation, especially in the first two years, is weighted more towards developing policy than towards program accountability. Feedback on the process is seen as much more important than summative evaluation, at the present time. We suspect that most Jewish educators recognize that Jewish education is not succeeding, and will understand that the field researchers are not there to document their failures. Instead, the field researchers can serve the educators and their communities by helping them reflect on their situations and by serving as mirrors in which their programs can be viewed alongside their goals.

In one sense, the evaluation project does emphasize accountability. By the end of the first year, lead communities are expected to have well-articulated visions for change, and implementation plans developed. The evaluation project will help judge whether the processes within the lead communities are leading towards these outcomes, and will assess progress toward these general goals in the spring of 1993.

# LEAD COMMUNITIES A PARTIAL SCENARIO

							_								
	1992	2	1993								19	94			
TASK NAME	Nov	D	J	F	М	А	м.	L	J A	s	0	Nov	D	J	F
4-6 PILOT PROJECTS				1	ş						1 19 al				
LOCAL CIJE			1					 				ep (			
EDUCATORS' SURVEY					1		. ***								
BEST PRACTICES		2 (j. j.		1. 1. 1.		-	e e e					5) 512			
MONITORING, EVALUATION, FEEDBACK	<u>8</u>										4 <u>5</u> 14	29			
5-YEAR PLAN				· .											
COMMUNICATIONS, NETWORKING		/ :	. *								-1.				

# LEAD COMMUNITIES—A PARTIAL SCENARIO

# **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

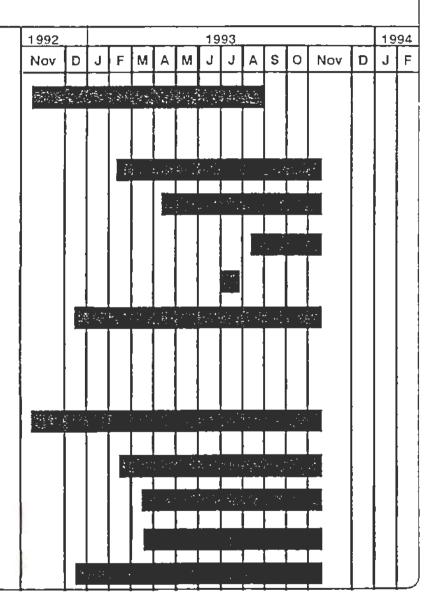
National Leaders Mobilize Local Leaders

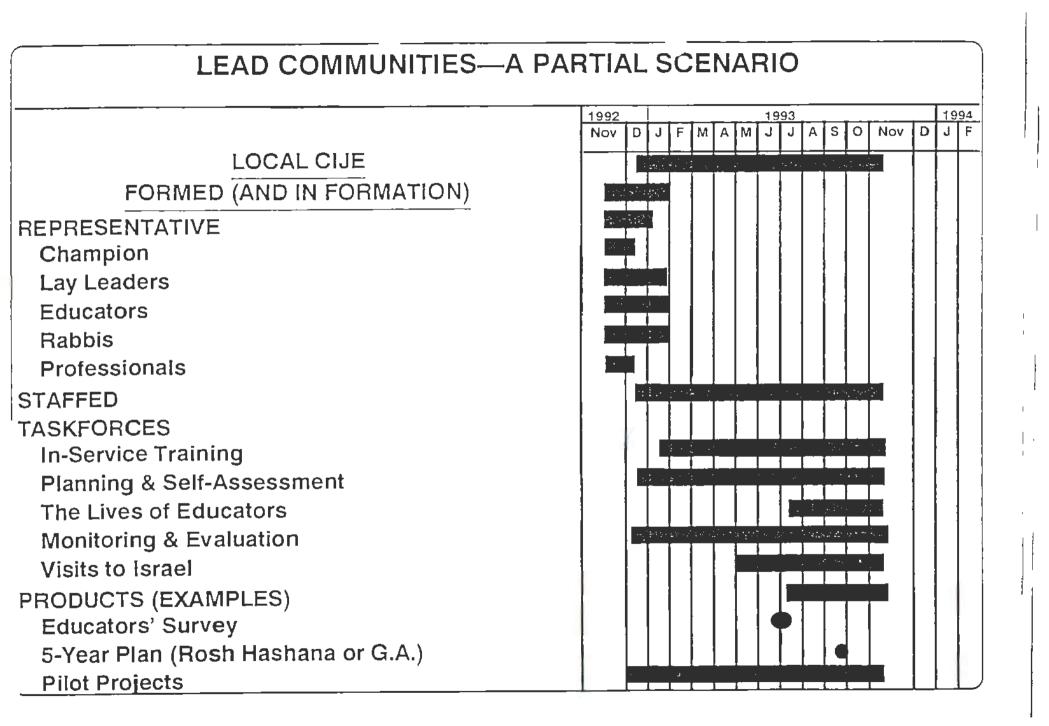
Leadership Training

CLAL Program for all Boards

**Denominational Leadership Training** 

**Public Sessions on Vision & Best Practices** 





# LEAD COMMUNITIES—A PARTIAL SCENARIO 1992 1994 1993 D F F M S Nov D 0 J Nov J M A J J A EDUCATORS' SURVEY PLAN REPRESENTATIVE TASKFORCE STAFF (LOCAL UNIVERSITY?) **MOBILIZE & INVOLVE EDUCATORS** DESIGN CARRY OUT ANALYZE **REPORT & DISCUSS FINDINGS**

# LEAD COMMUNITIES—A PARTIAL SCENARIO

# **BEST PRACTICES**

IMPLEMENTATION PLANNED Develop Method for Training

**Develop Translation Method** 

**6 AREAS COMPLETED** 

**PROJECT PRESENTED** 

FIRST 2 AREAS SELECTED

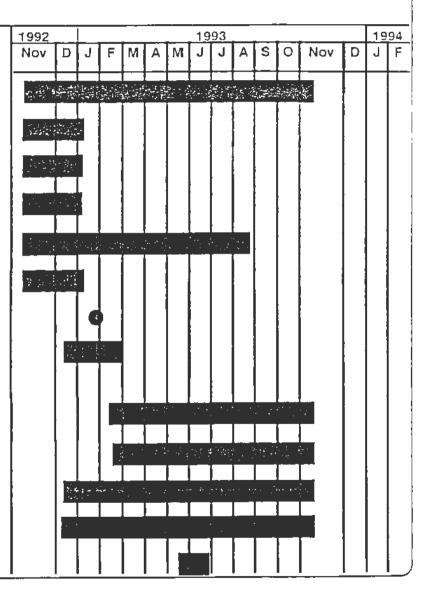
CONSULTANTS SELECTED & TRAINED

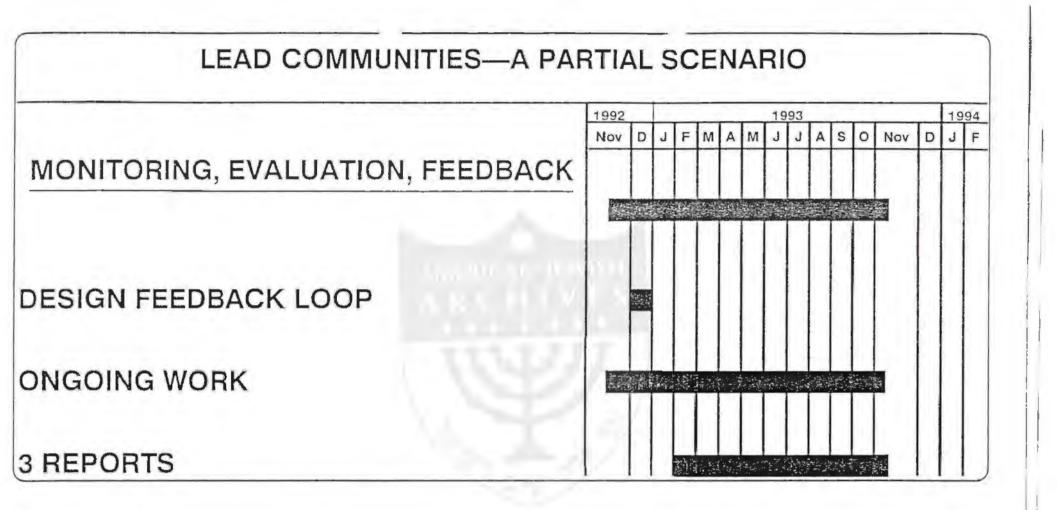
WORK WITH SUPPLEMENTARY SCHOOL PRINCIPALS

Joint Planning of Implementation

NETWORK WITH EARLY CHILDHOOD TEACHERS Joint Planning of Implementation

PLAN ROUND 2 OF PROJECT





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# LEAD COMMUNITIES—A PARTIAL SCENARIO

5-YEAR PLAN (SEE SEPARATE)

ASSESSMENT OF EDUCATIONAL SYSTEM Prepare Detailed Guide

Profile

Inventory

**Educators' Survey** 

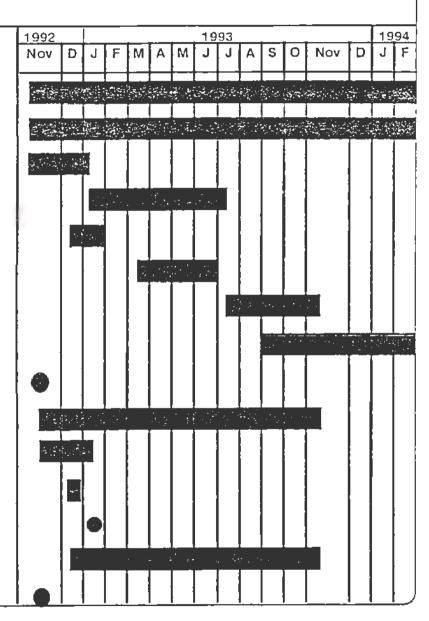
Achievement Measures

Clients' Survey

Etc.

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THE PLAN – ROUND 1
Prepare Detailed Guide
Staff
Taskforce Set-Up
Give Assistance as Needed
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Etc.



LEAD COMMUNITIES—A PARTIAL SCE	ENARIO
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	1992 1993														1994		
	Nov	Ð	J	F	M	A	м	J	J	A	s	0	Nov		J	F	
COMMUNICATIONS, NETWORKING	•					ł,											
PLAN – STAFF – CARRY OUT																1	
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)	1 🖤				I				l	I.				1			

**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

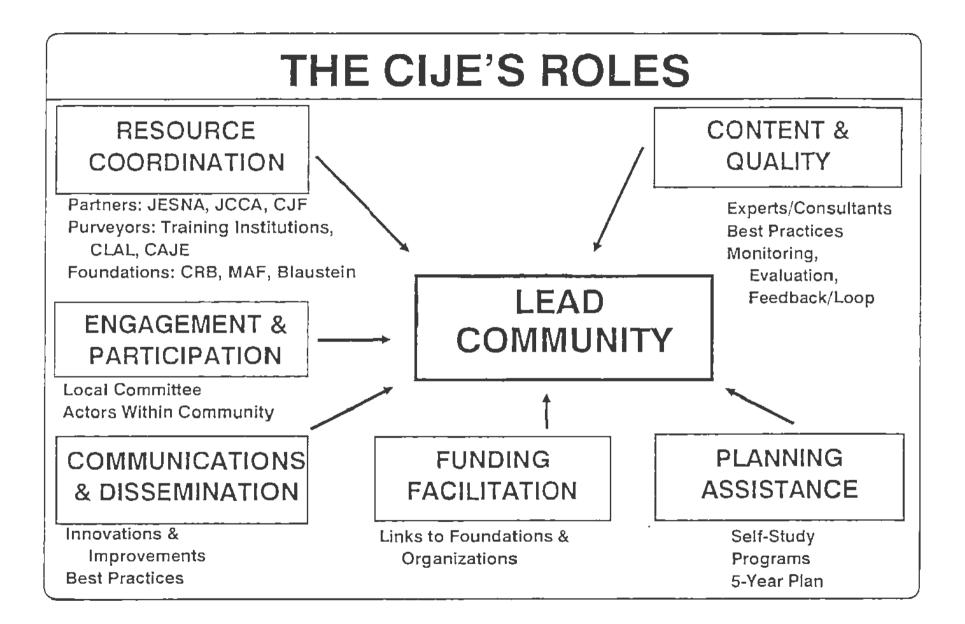
Champion recruited Leadership training New leaders Goals discussed Educators discussed Networking with cije leaders Networking between communities

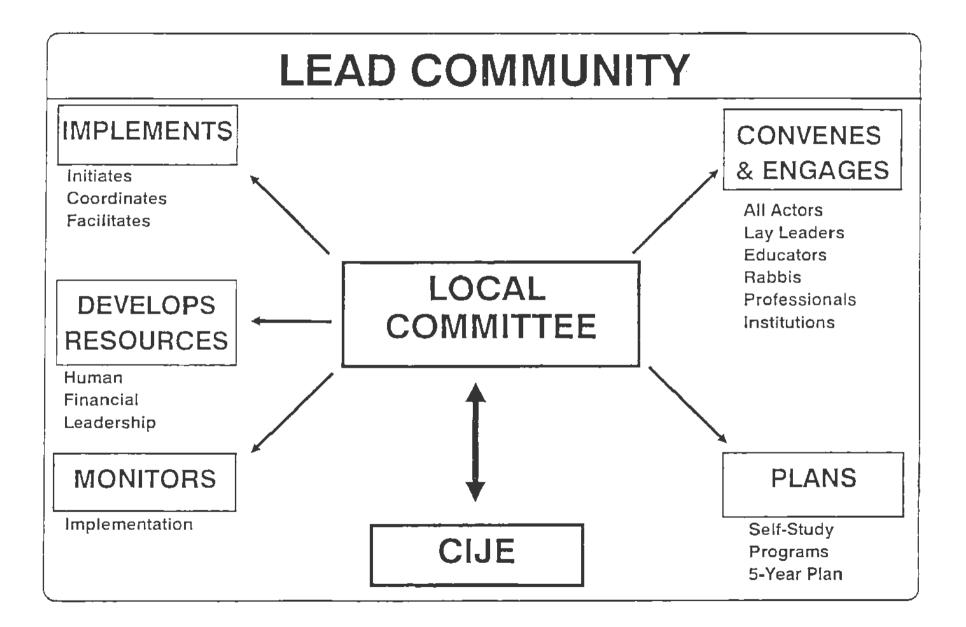
# ISRAEL AS A RESOURCE

Plans for "every youth" Educators summer seminar

# RESEARCH

Monitoring, evaluation, feedback DAta base—assessment





#### STRATEGIC PLANNING FOR JEWISH EDUCATION

Priority Recommendations from the Subcommittees on:

- Congregation and Communal Religious School Education
- Jewish Day School Education
- Informal Jewish Education

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Approved by the Commission on Jewish Education, 2/3/92

#### KEY FOR INTERPRETING ATTACHED LIST OF RECOMMENDATIONS

- All of the recommendations are listed in priority order within their core area (Personnel, Programs/Initiatives, Special Populations) as ranked by members of the Commission on February 3, 1992. Two items sharing the same ranking indicates that they both received the same number of votes.
- Before each recommendation, you will note either 1, 2, or 3 asterisks. These asterisks indicate the following:
  - denotes a recommendation which appeared in one of the subcommittee reports to the Commission.
  - \*\* denotes a recommendation which appeared in 2 subcommittee reports.
  - \*\*\* denotes a recommendation which appeared in 3
     subcommittee reports.
- In the case of recommendations which appeared in more than one report, the original language has been modified to create a single integrated recommendation.
- A series of code letters appear in parenthesis after each recommendation. These letters are abbreviations for the constituencies which are impacted by that particular recommendation. The letters represent the following:

EC	= Early Childhood
C	= Children
Adol	= Adolescents
CAY	⇒ College Age Youth
A	= Adults
F	= Families
ALL	= All of the above constituencies

oa/ personnel

- \*\*\* 1. Increase teacher <u>salaries</u> and enhance <u>benefits</u>. New salary standards should be established by upgrading salaries for existing personnel and ensuring appropriate salary levels for newly created positions. (EC, C, Adol, A, F)
- \*\*\* 2. Develop and utilize professional growth opportunities for <u>in-service training</u> of both teachers and principals via classes, credit courses,workshops, seminars, and educational experiences on the local, national and international level. (EC, C, Adol, A, F)
- \*\*\* 2. Develop and establish an intensive <u>recruitment</u> program to identify potential teachers/educators and monitor and assist them with their educational training and ultimate <u>placement</u> within a school. (EC, C, Adol, A, F)
  - a) Use the BJE in assisting the schools in identifying and recruiting teachers in <u>specialty</u> <u>areas</u> such as art education, music education, family education, remediation as well as specific curriculum areas. (EC, C, Adol, F)
- \*\* 3. Provide teachers/educators with <u>incentive grants</u> in order to encourage and reward excellence. (EC, C, Adol)
- Create more <u>full-time teaching positions</u> in order to make the field of Jewish education a primary vocational focus, rather than a supplementary position to other jobs in the community. (EC, C, Adol)
- Enhance community <u>recognition</u> of teachers to express esteem and to elevate the status of teachers in the community. (EC, C, Adol)
- 5. Examine the personnel impact of the structure and funding guidelines of <u>Synagogue Council and Joint</u> <u>Commission</u> programs in order to determine whether these two programs meet the current needs of the Jewish educational community. (EC, C, Adol)
- f. Investigate the feasibility of establishing a community or school-based <u>day care</u> program for children of teachers. (EC, C, Adol)
- 7. Provide more intensive educational <u>consultation</u> services to teachers and pupils. (EC, C, Adol)

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PERSONNEL-NK-TW

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- Assist in making possible an <u>experience in Israel</u> for members of the Baltimore Jewish community. This should include the development and funding of pre-and post-trip educational programs, maximizing the Jewish identity-affirming impact of the experience in Israel. (Adol, CAY, A, F)
  - a) Develop an endowment fund to support educational experiences in <u>Israel for Secondary Education</u> students. (Adol)
- I. Develop a <u>comprehensive outreach</u> campaign to extend to a wider segment of our community. New creative approaches must be identified to address the Jewish needs of the vast numbers of Jews who are marginally affiliated with or are not participating in existing Jewish institutions and their programs. Specific constituencies targeted for outreach should be school age children not currently enrolled in a Jewish school and unaffiliated college youth. (ALL)
- Commit funds on a <u>multi-year basis</u> in order to ensure the long-term viability of programs. (ALL)
- Increase staff and program resources on <u>college campuses</u> in the Baltimore area in a coordinated and unified manner. (CAY)
- \*\* 4. Provide <u>consultative services</u> from THE ASSOCIATED to the schools in financial resource development to assist in areas of capital needs, endowment development, fiscal planning and grantmaking. (ALL)
- S. Continue to provide financial support for the <u>day schools</u>.
   <u>operating needs</u>. (C, Adol)
- 6. Encourage <u>interagency collaborative</u> projects, with synagogues participating as full partners, especially in community-wide events. (ALL)
- \* 7. Implement effective models for <u>family education</u>. (F)
- 8. Increase the number of <u>hours of the BJE Resource Center</u> to provide more intensive educational consultation services to teachers and pupils. (EC, C, Adol)
- Stablish <u>an informational resource</u> whose role would be to take responsibility for: (ALL)
  - a) Identifying gaps in our existing education system and advocating for the development of new programs;
  - b) Serving as a community resource for available programs/services, and enhancing the Jewish component of programs; and

- c) Identifying opportunities for interagency collaboration on programming and reducing possible redundancies.
- 10. Utilize <u>marketing resources</u> of THE ASSOCIATED to determine the desired needs of various population groups and to inform people about available programs. (ALL)
- 10. Increase <u>capitation grants to the day schools</u> based upon the number of students enrolled in the day schools. (C, Adol)
- 11. Expand <u>BJE Resource Center materials</u> to include a greater variety of educational resource material as well as a resource bank of personnel in specialized areas. (EC, C, Adol)
- Provide schools with <u>ongoing information and data</u> regarding effective educational models which have the potential for replication in school setting. (EC, C, Adol)
- 13. Investigate feasibility for providing students with a community-wide school <u>transportation system</u>. (C, Adol)
- 13. Develop <u>recognition/incentives</u> to stimulate academic excellence of students. (C, Adol)
- Provide more intensive guidance and assistance to schools in the areas of program planning and development by the BJE. (EC, C, Adol)
- I4. Ensure the <u>transition</u> of pupils from preschool programs to elementary school. (EC, C)
- \* 14. Assist principals in developing <u>measures of accountability</u> for their congregational schools. (EC, C, Adol)
- 15. Offer new ventures and experiments in <u>adult education</u>. (A)
- 15. Focus BJE's <u>curriculum service program</u> on the specific needs of each congregational school via assigned BJE consultants. (EC, C, Adol)
- \* 15. Explore various educational <u>formats and methodology</u> in order to successfully implement the goals and objectives suggested in the Report of Subcommittee on Congregational and Communal Religious School Education. (EC, C, Adol)
- 15. Provide ongoing <u>analysis</u> of congregational school-based educational needs. (EC, C, Adol)
- \* 16. Organize, market, and coordinate all programs for singles. (CAY, A)
- 16. Assist schools in the critical areas of experiential and informal Jewish educational programming. (EC, C, Adol)

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 Provide schools with more source material relevant to their individual <u>curricular needs</u> through a BJE consultant. (EC, C, Adol)

INITIATIVES-NK-TW

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#### SPECIAL POPULATIONS

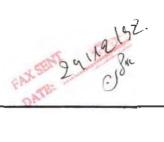
- \*\*\* 1. Increase <u>scholarship and loan funds</u> available, enabling students from families with limited financial resources and/or new immigrant families and/or families with multiple children to experience Jewish education programs of their choice (e.g. day schools, congregational schools, higher Jewish education, Israel experience). (F)
- \*\* 2. Meet needs of children with <u>special educational</u> <u>needs</u> by: (EC,C,Adol)
  - a) enhancing the quality and scope of services;
  - b) strengthening community advocacy for special learning needs; and
  - c) encouraging interschool sharing of information and coordination of programs.
- Increase funding for <u>immigrant support services</u> such as ESL classes and other tutorial programs. (C,Adol)

SPECIALPOPULATIONSNK

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# Mandel Institute

מכון מַנדֵל

Tel. 972-2-617 418; 618 728 Fax: 972-2-619 951

## **Facsimile Transmission**

To: Mr. Art Rotman	Date: 29	December 1992
From: Annette Hochst	No. Pages:	2
Fax Number:	-	

From : Ukeles Associates Inc.

PHONE No. : 12122508760

PAGE.002 Dec.22 1992 5:11PM P01

Inne 12

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	٥	o	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
12/18	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

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### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing Address: 163 Third Avenue #128 • New York, NY 10003

Phone: (212) 532-1961

FAX: (212) 213-4078

# **TELEFAX**

TO: Annette Hochstein DATE: December 28, 1992

.

FROM: Art Rotman FAX #: 619-951

Number of pages (including this sheet) 3

MESSAGE:

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Denne Com

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

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# 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 TOTA	L HOURS PER M		45.69	

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

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

## MEMORANDUM

DATE:

TO: Seymour Fox Steve Hoffman Stanley Horowitz Marty Kraar Ginny Levi Mort Mandel Henry Zucker

FROM:

Art Rotman SUBJECT: Background material, January 5 meeting, Cleveland

December 23, 1992

Attached is a background piece for our meeting at the Premier offices, room 140, from 3:00 p.m. to 6:00 p.m. on Tuesday, January 5, 1993.

I look forward to seeing you all then.

#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 New York NY 10003

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

December 22, 1992

## MEMORANDUM

TO: Shulamith Elster DATE: Seymour Fox Ellen Goldring Roberta Goodman Annette Hochstein Barry Holtz Art Naparstek Claire Rottenberg Julie Tammivaara Jack Ukeles

FROM: Jo Ann Schaffer SUBJECT: CIJE Staff Calendar

The attached calendar has been complied to facilitate communications among CIJE staff members. It contains all the information I have received to date.

## CIJE STAFF CALENDAR JANUARY 1993 (as of 12/22/92)

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
				1 HOLIDAY
4	5	6	7	8
EG - ISRAEL	AR - CLEVELAND EG - ISRAEL	RG - MILWAUKEKE SRE - SCHOOL VISITS EG - ISRAEL	RG MILLWAUKEE EG - ISRAEL	SRE - DC/MD EG - ISRAEL
11	12	13	14	15
RG - CLEVELAND College of Judaic Studies (216) 464-4050 (contact Jeff Schein) EG - ISRAEL	JU - BALTIMORE RG - CLEVELAND	RG - CLEVELAND	SRE - CLEVELAND (contact Art Naparstek)	SRE - DC/MD
18 UAI - CLOSED RG - NASHVILLE JT - NASHVILLE CR - NASHVILLE with Ellen Goldring	19 RG- NASHVILLE JT - NASHVILLE CR - NASHVILLE with Ellen Goldring	20	21 CIJE SENIOR.ADVISORS MTG. JU, SRF	22 SRE DC/MD
25	26	27	28	29
AR FLORIDA/SEMINAR	AR FLORIDA/SLMINAR	AR - ELORIDA/SEMINAR SRE - WASHINGTON, DC		SRE - DC/MD

a B o d

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221308

Ø6:19 PM CLJE

25, 20 030

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing Address: 163 Third Avenue #128 \* New York, NY 10003 Phone: (212) 532-1961 \* FAX: (212) 213-4078

## TELEFAX

To: Annette Hochstein

Date: December 17, 1992

From: Arthur Rotman

FAX #: 011 972 2 619 951

Number of pages (including this sheet) \_\_1\_\_

MESSAGE:

Steve Gelfand of Atlanta called:

- He would like to get some material on Best Practices. I am not sure how you want to handle this -- whether you want Barry to meet with him on the material, or whether it would be all right to mail it, or whatever. Please take it from here and keep me posted so that I know that Gelfand's request is being met.
- Steve is also concerned about his next steps in planning. He heard a number of suggestions at the meeting in New York on planning which he thought were excellent, as far as they went. However, that appears to be only a skeleton and he would like to have something fleshed out either in writing or in person. Again, please take it from here and keep me posted.

Phone (212) 532-1961

FAX: (212) 213-4078

## TELEFAX

TO:	Annette Hochstein Seymour Fox	DATE:	December 17, 1992
FROM:	Art Rotman	FAX #:	619 452

Number of pages (including this sheet) \_\_1\_\_

MESSAGE:

1. RE DEVELOPMENT OF "VISION" STATEMENTS

YOU UNDERTOOK AT THE AUGUST 26 MEETING TO DEVELOP. I REMINDED YOU ON DECEMBER 7 BY FAX. ANYTHING NEW?

2. ALSO, A REMINDER THAT YOU UNDERTOOK AT THE MEETING ON NOVEMBER 23 TO DISCUSS THE PROSPECT OF JESSELSON'S INVOLVEMENT WITH DAY SCHOOLS OR ANOTHER PROJECT WITH DANNY TROPER ANY DEVELOPMENT?

## ANNUAL MEETING AND BOARD MEETING February 25, 1993

## PROPOSED AGENDA

- I. A Community Progress Report
  - Baltimore -- Roy Hoffberger
- II. Foundations:
  - Grant -- Cummings Foundation
  - Proposals in Progress
- III. Planners Meeting -- Report of Planners Meeting, New York, November 1992
  - One of Planners to report; issues raised at meeting; resolved and unresolved.
- IV. Presentation by one of Seminary Heads (along lines of Lamm presentation at last Board meeting)
- V. JESNA and CIJE Working Together -- Neil Greenbaum
- VI. Introduction of new Board member -- Susan Crown (Gershon Kekst)
- VII. Plans for Board Meeting in Lead Communities
- VIII. Monitoring, Evaluation, and Feedback Project Progress Report
- IX. Pilot Projects
- X. CIJE Staff
  - Roll of Annette Hochstein and Seymour Fox
  - Lenny Rubin-type
  - Barry Holtz

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

FAX: (212) 213-4078

## TELEFAX

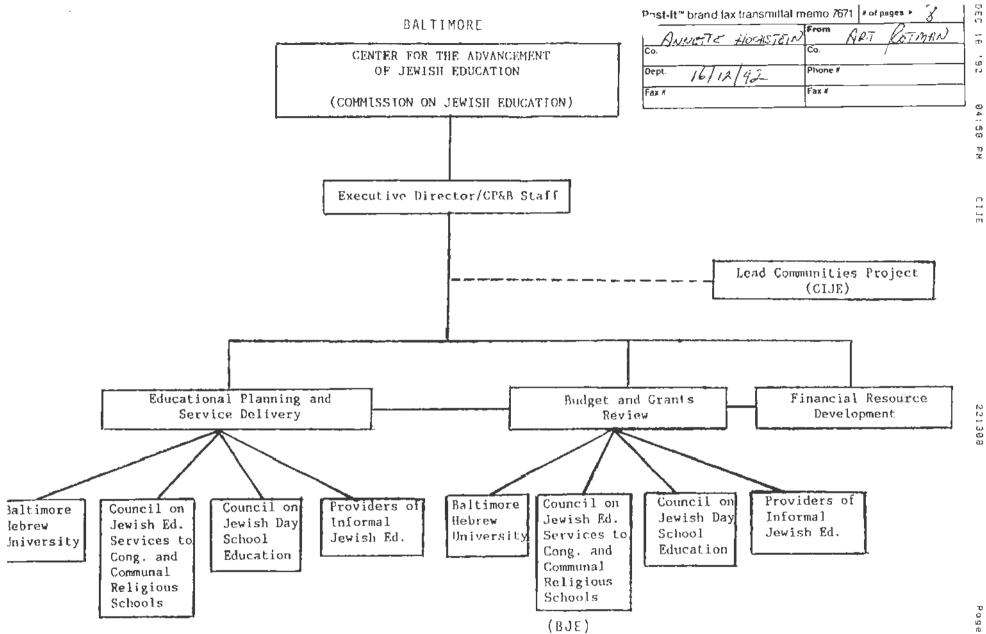
December 16, 1992 DATE: Annette Hochstein TO:

FAX #: 619 452 Art Rotman FROM:

Number of pages (including this sheet) \_\_1\_

MESSAGE:

THIS IS TO CONFIRM MY MEETING WITH YOU AT 5:00 P.M. ON WEDNESDAY. I PLAN TO LEAVE THE MEETINGS TUESDAY (11:30 A.M.-2:30 P.M.) TO MEET WITH THE JCCA STAFF.



2/9/92

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#### 221388

STRATEGIC PLANNING FOR JEWISH EDUCATION

Bestmere

Priority Recommendations from the Subcommittees on:

- Congregation and Communal Religious School Education
- Jewish Day School Education
- Informal Jewish Education

Approved by the Commission on Jewish Education, 2/3/92

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Adol	-	Adolescents
CAY	-	College Age Youth
λ	200	Adults
F		Families
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oa/ personnel

#### PERSONNEL

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- 4. Enhance community <u>recognition</u> of teachers to express esteem and to elevate the status of teachers in the community. (EC, C, Adol)
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PERSONNEL-NK-TW

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- \*\* 1. Assist in making possible an <u>experience in Israel</u> for members of the Baltimore Jewish community. This should include the development and funding of pre-and post-trip educational programs, maximizing the Jewish identity-affirming impact of the experience in Israel. (Adol, CAY, A, F)
  - a) Develop an endowment fund to support educational experiences in <u>Israel for Secondary Education</u> students. (Adol)
- \*\* 1. Develop a <u>comprehensive outreach</u> campaign to extend to a wider segment of our community. New creative approaches must be identified to address the Jewish needs of the vast numbers of Jews who are marginally affiliated with or are not participating in existing Jewish institutions and their programs. Specific constituencies targeted for outreach should be school age children not currently enrolled in a Jewish school and unaffiliated college youth. (ALL)
- Commit funds on a <u>multi-year basis</u> in order to ensure the long-term viability of programs. (ALL)
- Increase staff and program resources on <u>college campuses</u> in the Baltimore area in a coordinated and unified manner. (CAY)
- \*\* 4. Provide <u>consultative services</u> from THE ASSOCIATED to the schools in financial resource development to assist in areas of capital needs, endowment development, fiscal planning and grantmaking. (ALL)
- \* 5. Continue to provide financial support for the <u>day schools'</u> <u>operating needs</u>. (C, Adol)
- Encourage <u>interagency collaborative</u> projects, with synagogues participating as full partners, especially in community-wide events. (ALL)
- \* 7. Implement effective models for <u>family education</u>. (F)

...

- .. .

- 8. Increase the number of <u>hours of the BJE Resource Center</u> to provide more intensive educational consultation services to teachers and pupils. (EC, C, Adol)
- 9. Establish <u>an informational resource</u> whose role would be to take responsibility for: (ALL)
  - a) Identifying gaps in our existing education system and advocating for the development of new programs;
  - b) Serving as a community resource for available programs/services, and enhancing the Jewish component of programs; and

- -, identifying opportunities for interagency collaboration on programming and reducing possible redundancies.
- 10. Utilize <u>marketing resources</u> of THE ASSOCIATED to determine the desired needs of various population groups and to inform people about available programs. (ALL)
- 10. Increase <u>capitation grants to the day schools</u> based upon the number of students enrolled in the day schools. (C, Adol)
- \* 11. Expand <u>BJE Resource Center materials</u> to include a greater variety of educational resource material as well as a resource bank of personnel in specialized areas. (EC, C, Adol)
- Provide schools with <u>ongoing information and data</u> regarding effective educational models which have the potential for replication in school setting. (EC, C, Adol)
- II. Investigate feasibility for providing students with a community-wide school <u>transportation system</u>. (C, Adol)
- Develop <u>recognition/incentives</u> to stimulate academic excellence of students. (C, Adol)
- Provide more intensive guidance and assistance to schools in the areas of program planning and development by the BJE. (EC, C, Adol)
- \* 14. Ensure the <u>transition</u> of pupils from preschool programs to elementary school. (EC, C)
- \* 14. Assist principals in developing measures of accountability for their congregational schools. (EC, C, Adol)
- \* 15. Offer new ventures and experiments in <u>adult education</u>. (A)
- I5. Focus BJE's <u>curriculum service program</u> on the specific needs of each congregational school via assigned BJE consultants. (EC, C, Adol)
- \* 15. Explore various educational <u>formats and methodology</u> in order to successfully implement the goals and objectives suggested in the Report of Subcommittee on Congregational and Communal Religious School Education. (EC, C, Adol)
- \* 15. Provide ongoing <u>analysis</u> of congregational school-based educational needs. (EC, C, Adol)
- 16. Organize, market, and coordinate all programs for singles. (CAY, λ)
- \* 16. Assist schools in the critical areas of experiential and informal Jewish educational programming. (EC, C, Adol)
- Provide schools with more source material relevant to their individual <u>curricular needs</u> through a BJE consultant. (EC, C, Adol)

INITIATIVES-NK-TW

#### SPECIAL POPULATIONS

- \*\*\* 1. Increase <u>scholarship</u> and <u>loan</u> funds available, enabling students from families with limited financial resources and/or new immigrant families and/or families with multiple children to experience Jewish education programs of their choice (e.g. day schools, congregational schools, higher Jewish education, Israel experience). (F)
- \*\* 2. Meet needs of children with <u>special educational</u> <u>needs</u> by: (EC,C,Adol)
  - a) enhancing the quality and scope of services;
  - b) strengthening community advocacy for special learning needs; and
  - c) encouraging interschool sharing of information and coordination of programs.
- Increase funding for <u>immigrant support services</u> such as ESL classes and other tutorial programs. (C,Adol)

SPECIALPOPULATIONSNK

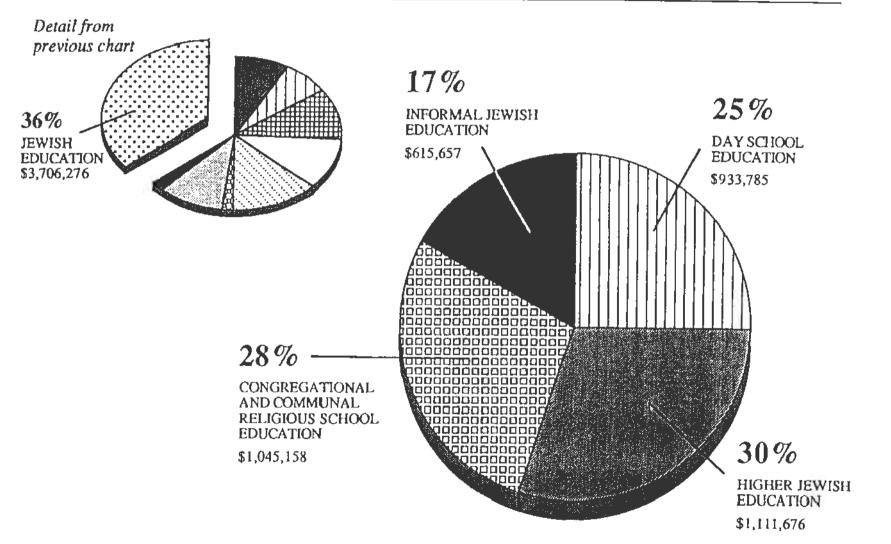
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Page 7

# STRATEGIC PLAN FOR JEWISH EDUCATION CONCEPTUAL FRAMEWORK

	PERSONNEL	EDUCATIONAL PROGRAMS/ INITIATIVES	SPECIAL POPULATIONS
EARLY CHILDHOOD			
CHILDREN			
ADOLESCENTS			
COLLEGE-AGE YOUTH			
ADULTS			
FAMILIES			

# FY 93 ALLOCATION TO JEWISH EDUCATION



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

# TELEFAX

TO:	Seymour Fox Annette Hochstein	DATE:	December 15, 1992
FROM:	Art Rotman	FAX #:	619 452

Number of pages (including this sheet) \_\_1o\_

MESSAGE:

- 1. I thought you would be interested in the enclosed agenda for my meeting with MLM on Thursday.
- Also enclosed is the second draft of the Chairman's Letter. Thanks for your; we have revised accordingly. You will be interested in this latest draft which is not a change in substance but in style.
- 3. For your information, here is a draft of my letter to Barry Holtz.

ART

### MEETING PARTICIPANTS: Mort Mandel, Art Rotman

#### **DECEMBER 17, 1992**

## AGENDA

- 1. Funding meeting -- January 5
- 2. Potential Funders
  - Bill Berman
  - Max Fisher
  - Ludwig Jesselson
  - Jim Joseph
  - Mark Lainer
- 3. Conference Call -- all staff and consultants -- re February 25 Annual Meeting and Board agendas. Suggested time: January 21, 9:30 a.m., EST
- 4. Board of Directors Meeting -- February 25
  - Agenda -- Annual Meeting and Board Meeting
  - Roy Hoffberger to report on Baltimore
  - Rehearsal: Steering Group February 24
  - Camper contacts
- Request from three Lead Communities for CIJE to provide one-time cash payment for the hiring of Planning Staff and providing consultations for first year. total cost \$100,000-\$120,000
- 6. Future Meeting Dates
  - Executive Committee meeting in May 1992
  - June meeting in Baltimore with CIJE leader (e.g., CRB) and potential major givers (to include planning for Board meeting in fall in Baltimore)
  - September or October Board Meeting in Baltimore
  - Board Meeting date in March 1994
  - Meeting of MLM and AR
    - -- Suggest change from February 4 to January 29 in Cleveland
- 7. Addition to the Board -- Gershon Kekst

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

## TELEFAX

TO:	Seymour Fox Annette Hochstein	DATE:	December 15, 1992
FROM:	Art Rotman	FAX #:	619 452

Number of pages (including this sheet) 10

MESSAGE:

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- 2. Also enclosed is the second draft of the Chairman's Letter. Thanks for your; we have revised accordingly. You will be interested in this latest draft which is not a change in substance but in style.
- 3. For your information, here is a draft of my letter to Barry Holtz.

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    - -- Suggest change from February 4 to January 29 in Cleveland
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## December 17, 1992 Meeting AGENDA continued

- 8. Best Practices Committee Chair briefing: John Colman, Barry Holtz, and AR, Milwaukee, January 28
- 9. Monitoring and Evaluation Chair briefing: ELR, Fox, Hochstein, AR with Adam Gamoran and Ellen Goldring
- 10. Conference Call with CIJE lay leaders (Executive Committee or selected leaders)
- 11. Monday, December 21, meeting at 11:00 a.m. (Israel)
- 12. Search for "Lenny Rubin-type" person
- 13. Professional Steering Committee
- 14. Chairman's Letter to the Board and PR possibilities
- 15. Barry Holtz hiring

#### SECOND DRAFT

#### CHAIRMAN'S LETTER TO CIJE BOARD

DEAR \_\_\_\_\_:

"...A huge bombshell has been dropped in our midst -- the CJF National Jewish Population Survey...Only a major sea change in the priorities of the American Jewish community which will place Jewish education -- a systematically reformed Jewish education -- at the top of the agenda can provide hope against a mounting tidal wave of assimilation which threatens to engulf us."

This highly charged call to action was delivered by Stuart Eizenstat to the delegates of the CJF General Assembly in November during a day devoted to Jewish continuity and identity. I was pleased to chair the panel at which Stu presented these remarks. As I listened to his sagacious comments, I couldn't help but feel a considerable degree of satisfaction in the knowledge that you and I are playing a leading role in this process of change.

During the GA, I hosted an informal gathering for delegates from our three Lead Communities and those of our Board who could attend. It was quite an emotional high to hear leaders of Atlanta, Baltimore, and Milwaukee speak with such enthusiasm of the Lead Communities Project.

As you are aware these are three very different communities but each is now engaged in the planning process with us at a pace that reflects their unique communal structure. Considering the diversity of our three Lead Communities, and, indeed, of all American Jewish communities, of primary importance to the Lead Communities Project is the documentation of <u>how</u> real change in Jewish education is accomplished. To that end we have implemented the **Monitoring, Evaluation, and Feedback Project**. Three professionals, each with her own area of expertise in education and research, are already at work in the Lead Communities to collect and analyze data on an ongoing basis. This information will provide communities with a meaningful tool for evaluating themselves and the process and progress of change.

But this Project serves an even greater purpose. We have never held the conviction that there is only one right way of achieving success. Therefore we also see the Monitoring, Evaluation, and Feedback Project as a means for us to develop well-tested guidelines for change which can be utilized in any community.

The key to the success of the MEF Project is the development of a collaborative, trusting, and interactive process. The Lead Communities need to know that our researchers are working with them to achieve our mutual goals. Recognizing the importance of developing this relationship, we have placed a particular emphasis on the initial *Launch and Gearing Up* phase of the Project and are helping communities to think about themselves and what it means to be a Lead Community while they develop their goals and feedback mechanisms.

In addition, during this first year our researchers will focus on three key questions:

- What visions for change in Jewish education are currently held by
   members of the community?
- To what extent is the community mobilized?
- What is the professional life of educators like in the community?

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pleased to note that a meeting held in late November with Lead Community Project planners from Atlanta, Baltimore, and Milwaukee and CIJE staff and consultants produced significant progress towards that goal. We shared with the community planners how we envision the implementation of this process for change, and they, in turn, left us with a better understanding of how these changes might best be approached within the context of their own communities.

I would also like to report to you that Susan Crown, President of the Ari and Ida Crown Memorial, has accepted our invitation to become a Director of the CIJE. For your convenience, I am enclosing an updated list of CIJE Board members.

At our last Board meeting we spoke of setting up some key committees to oversee various aspects of CIJE's operation. To date, the following Directors have agreed to be committee chairs:

- John Colman (Chicago) -- the Best Practices Project Committee
- Chuck Ratner (Cleveland) -- the Lead Communities Project Committee
- Esther Leah Ritz (Milwaukee) -- the Monitoring, Evaluation, and
   Feedback Project Committee

In addition, we have formed an Executive Committee which will act on the Board's behalf between meetings and will prepare reports to the Board. (list names?)

It has taken us just two short years to go from the abstract to the concrete. Since the release of the recommendations of the Commission on Jewish Education in North American in 1990, we have created an entity to oversee the implementation of these recommendations, assembled a team of exceptional professionals, further refined the

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guidelines for accomplishing change, selected three outstanding communities to share in this great experiment, and taken our first steps towards not only reversing the trends reported in the recent CJF study, but revitalizing our Jewish communities in a way few thought possible.

Hook forward to sharing even more accomplishments with you at our next Board meeting on February 25, 1992.

My warmest wishes to each one of you for a wonderful Chanukah and Healthful New Year.

Morton L. Mandel

## DRAEI

## DRAEI

December 15, 1992

Mr. Barry Holtz, Consultant Melton Research Center for Jewish Education The Jewish Theological Seminary 3080 Broadway New York, NY 10027

Dear Barry:

I am pleased to confirm your appointment to the staff of the Council on Initiatives in Jewish Education. The appointment will be for a part-time position, effective January 1, 1993, and full time effective June 1, 1993 while you are on leave of absence from The Jewish Theological Seminary.

Your assignment will be to develop the Best Practices Project and the educational content in the Lead Communities and related assignments. We will be discussing the title and it should, of course, be descriptive of your assignment.

Your immediate supervisor will be Annette Hochstein, of the Mandel Institute staff, who is acting as a consultant to the CIJE. Annette will take up any questions or concerns you may have about your work.

221309

#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 New York, NY 10003 .

Phone: (212) 532-1961

FAX: (212) 213-4078

## MEMORANDUM

TO: FILE

DATE: December 14, 1992

CC: Shulamith Elster Seymour Fox Ellen Goldring Sol Greenfield Annette Hochstein Steve Hoffman Barry Holtz Mort Mandel Jack Ukeles Jon Woocher Hank Zucker

FROM: Art Botman

SUBJECT: Meeting Notes, Dec. 11, Baltimore

Participants: Darrell Friedman, Marshall Levin, Chaim Botwinick, AR

The meeting had been arranged to explore the possibility of a visit to the community by one of CIJE's top lay leaders to meet with potential Baltimore donors to local Jewish education projects. The situation in Baltimore is such that they are well along in the development process. They have had a commission on Jewish education for some time and have started to receive funding (\$300,000). It became apparent that the visit of a CIJE leader is not a pressing need at this time.

We discussed the possibility of having the August-September CIJE Board meeting in Baltimore. This could be preceded by a meeting six weeks to two months in advance with top leadership and potential donors in Baltimore. Part of the agenda would involve preparation for the CIJE Board meeting there in the fall.

Names suggested for invitations to such a meeting included:

George Hess (Meyerhoff Foundation). While he is a "pro" as the president of the Foundation, he is independently wealthy and is a \$50,000 giver to the campaign;

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Leroy Hoffberger, chairman of the Commission and influential in the Hoffberger family foundation;

David Hirschhorn (Blaustein Foundation);

Kaplan (Strauss Foundation).

The Baltimore prosimade a strong pitch for using a portion of the consultation budget of CIJE. In the first year it doesn't appear that they will have much use for consultant services. Accordingly, they suggested that a cash payment be made to the community in lieu of such consultation services to assist them in setting up their own service. This would be a one-time only arrangement. In the second and succeeding years, CIJE would provide consultation services at its discretion but there would be no cash transfer.

I mentioned the Annual Meeting in February and they suggested that Leroy Hoffberger be invited to attend and perhaps speak a bit about developments in Baltimore.

alling Address: 163 Third Avenue #128 = none (212) 532-1961

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

# TELEFAX

TO: Seymour Fox DATE: December 14, 1992

FROM: Art Rotman FAX #: 619 452

Number of pages (including this sheet) \_\_1\_

MESSAGE:

INSTEAD OF BEING PICKED UP AT THE AIRPORT ON ARRIVAL, I WOULD APPRECIATE YOUR ARRANGING FOR A CAR TO PICK ME UP IN NATANYA ON MONDAY MORNING, DECEMBER 21, AT 9:00 A.M.

ADDRESS: JABOTINSKY 27, APARTMENT 11 TELEPHOHE: 053 828227

PLEASE CONFIRM.

REGARDS.

ART

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

## MEMORANDUM

TO:	Seymour Fox Annette Hochstein	DATE:	December 14, 1992
FROM:	Art Rotman	SUBJECT:	Conference Call, Dec. 16

Agenda items for our call on Wednesday at 9:30 a.m. ET:

- 1. Planners' request for \$40,000
- 2. Formation of a Steering Committee of educators and community pros
- 3. Briefing of John Colman -- Best Practices
- 4. Briefing of Esther Leah Ritz -- Monitoring, Evaluation, and Feedback
- 5. Technical assistance to communities in planning.

#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 .

Phone: (212) 532-1961

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

## MEMORANDUM

DATE:

TO: Annette Hochstein

FROM: Art Rotman

SUBJECT: Letter of Understanding

December 14, 1992

Thanks for your memo of December 10th.

The letters you have are substantially the same as those we looked at on November 23rd. At that time you did say that the Letter of Understanding should be reviewed in a year's time. However, the statement in your memo that "this is in order to allow us to negotiate the real agreement during the current year" is a new idea which I don't recall us discussing before. Perhaps we can take it up when we meet in Jerusalem.

I note the issues which you raise as "problematic." Yes, these are issues which we've discussed over the last several months. Nevertheless, we decided some time ago to go ahead with the Letter of Understanding despite the fact that they are "problematic."

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 Phone (212) 532-1961 New York, NY 10003 FAX: (212) 213-4078

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#### MEMORANDUM

TO: Participants in Lead Communities DATE: December 1, 1992 Planners Workshop 11/23-24/92

FROM: Art Rotman SUBJECT: Record of Decisions

The following is a list of decisions agreed to by participants in the planning workshop. A full set of minutes is being prepared.

- 1. CIJE will draft a pilot projects plan for working with the Lead Communities, including open dates and questions for completion by Lead Communities.
- 2. CIJE will provide Lead Communities with the following:
  - A. A paper will be prepared on Best Practices which will include oescriptions of Best Practices. It will also list steps for introducing the Best Practices Project to the Lead Communities within three weeks.
  - B. A Planning Guide to assist communities in developing a five-year strategic plan and a first-year acton plan.
  - C. A list of names, addresses, and telephone numbers of workshop participants and other resource people.
- CIJE will set up a conference call for the Lead Communities and CIJE staff to begin planning the next steps.
- The three communities will work together to identify at least one common pilot project that each will develop in the near future.
- A meeting of this group, possibly to include the communities' lay leadership, will be planned for April 24 to coincide with the CJF Quarterly.
- 6 It was proposed that one or more CIJE Board members meet with local lay leaders.
- 7. CIJE and JESNA will prepare an inventory of current initiatives in Jewish education which might be of use to Lead Communities in their planning.
- 8 CIJE will seriously consider the possibility of providing up to \$40,000 toward funding a position in each Lead Community to facilitate the planning process.

Dept.	Phone #
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TO ANNETTE Y	Variston From JO ANN SHREFER

## MEMORANDUM

TO:	Shulamith Elster Seymour Fox Ellen Goldring Roberta Goodman	DATE:	December 11, 1992
	Annette Hochstein Barry Holtz Art Naparstek Claire Rottenberg Julie Tammivaara Jack Ukeles	CC:	Art Rotman
FROM:	Jo Ann Schaffer	SUBJECT:	Staff Communications

In order to facilitate communications among the CIJE staff, I will be distributing at least once a month a calendar listing the whereabouts of each of you. Would you please fill in the attached calendar with the following information:

- At what location you can be reached during the week;
- if out of the office: the city where you will be, phone number(s), and, where
  possible, a contact person within the community;
- indicate when you will not be available, i.e., vacation;
- optional: where you can be reached on the weekend.

**Please fax the information to me as quickly as possible** so that it can be promptly distributed via fax. As I receive schedule changes, I will revise the calendar accordingly and disseminate.

If there is additional information you would find useful or if you you would like to see this data presented in a different format, please let me know.

## ANNETTE HOCHSTEIN CALENDAR JANUARY 1993

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
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11	12	13	14	15
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			20	29

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CIJE

## SEYMOUR FOX CALENDAR JANUARY 1993

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	27	28	29

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## COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

 Mailing Address:
 163 Third Avenue #128
 New York, NY 10003

 Phone:
 (212) 532-1961
 FAX:
 (212) 213-4078

## TELEFAX

TO: Seymour Fox DATE: December 10, 1992

FROM: Art Rotman FAX #: 619 452

Number of pages (including this sheet) 2\_

## MESSAGE:

WHEN WE ALL MET WITH MLM ON NOVEMBER 23rd, WE DISCUSSED THE ATTACHED ISSUE. ANYTHING NEW?

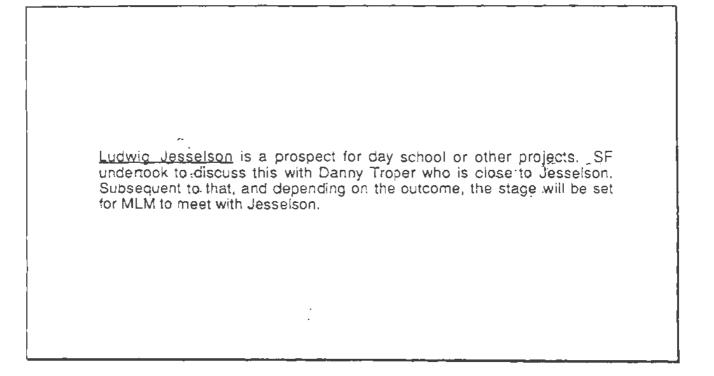
REGARDS.

ART





## EXCERPTS FROM MEETING WITH MORT MANDEL, NOVEMBER 23, 1992:



TIMESHEET Nov 29 - Dec 5						
DATE	JBU Hours	JM Hours	Assoc Hrs	Sub-tote		
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12/4		0	0	0.0		
Hours	0.00	2.50	0.00	2.5		

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TO ANNETTE HOCHSTEIN	From ART ROTMAN
Co.	Co. /
Dept.	Phone #
Fax #	Fax#

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 . . Phone: (212) 532-1961

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

#### MEMORANDUM

TO: DATE: Annette Hochstein December 8, 1992 FROM: Art Rotman SUBJECT: CIJE 1993 Budget

In developing the '93 budget, I am making an assumption about the use of Jack Ukeles Associates. We have allowed an amount of \$96,000 in the '93 budget. This is based on 8 days of service per month at \$1,000 a day.

Before I go any further, however, I'd like you to give me an educated guess as to whether you think that this amount is too high or too low.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address 163 Third Avenue #128 • Phone: (212) 532-1961

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

## MEMORANDUM

TO: DATE: December 4, 1992 Annette Hochstein

FROM: Art Rotman SUBJECT:

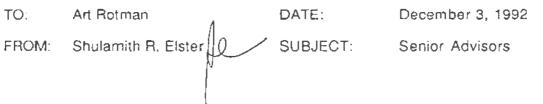
When you were in New York I asked you about charges for the use of Mandel Institute (Israel) staff by CIJE.

You indicated that in the last few months you had not been making any such charges. and that it is not your intention to do so.

Please confirm.

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATIONMailing address163 Third Avenue #128Phone: (212) 532-1961New York, NY 10003FAX: (212) 213-4078

## MEMORANDUM



As per our discussions, notices have gone out for the Senior Advisors meeting on January 21st at the JCC Association. The meeting will be from 10 A.M. - 2 P.M. in the Conference Room.

A small group of advisors (Bieler, Elkin, Hoffman, Joel, Lee, Spack, Woocher, and perhaps one or two more) will be convened to help plan the agenda. Thank you for this helpful suggestion.

Barry, Jack, Jon Woocher and Ellen have been alerted to "hold the date" so we have much flexibility with the agenda.

cc: Annette Hochstein

SRE:jl

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	* *	Art:
φ.		January 21st is the new date for the Senior Advisors of the CIJE. The meeting is scheduled from 10-3 here at the JCCAssn. We will start with coffee etc. at 9:30.
	•••	I have confirmed the date with staff and key individuals we will want to have in attendance. These include Barry Holtz, Jon Woocher, Ellen Goldring, Jack Ukeles- and of course,
the there		yourself. I am also contacting our "key" movement and organizational opinion leaders today to have them hold the date.
-		I am meeting with Jack Bieler in Washington on Friday. He and Josh Elkin are our "key" working educators in the field and I want both of them in especially as we consider pilot projects/ bestpractices etc. in various settings.
		I will do a draft agenda for this meeting- consult with those mentioned in the second paragraph- and then give it to you for final approval before you leave for Israel.
	• • • • • •	We have a meeting scheduled for tomorrow-(Thursday) and 1'm
	····· }	P.S. I think it very important that you inform Adam Gamoran and through him- or separately- Ellen that Annette is now the supervisor of the Lead Communities Project. In a conversation with Ellen this morning about the meeting date, I did mention this to her. They both need to hear from you about it.
		Has Jon Woocher been informed? Chuck Ratner as the chair of the Committee?
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## COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

FAX: (212) 213-4078

## MEMORANDUM

To: Annette Hochstein Date: November 30, 1992

From: Art Rotman

cc: Seymour Fox

We talked last week about periodic conference calls.

Annette, Seymour and I should be on the phone together at least once every two weeks on a scheduled basis. I suggest the following:

Wednesday, December 16, 9:30 a.m.

Thursday, January 7, 9:30 a.m.

Thursday, January 21, 9:30 a.m.

I will take responsibility for developing a schedule beyond the above dates.

As to the content of the calls, I suggest that we exchange agenda items at least 48 hours in advance of each call.

In addition, I am sure that Annette will now want to be scheduling calls with Shulamith and other staff as she feels necessary.

## MEMORANDUM

TO:	Annette Hochstein	DATE:	November 17, 199 <b>2.</b>
FROM:	Art Rotman	SUBJECT:	Revised Agenda for 11/19-20

Attached is a revised Agenda for our meetings on November 19 and 20. You are scheduled to lead the meeting for the following items at the approximate times indicated:

#### Thursday, November 19

12:30 p.m.

The First Year

- Overview and Work Plan
- Expectations of CIJE
- Planning with Lead Communities (with J. Ukeles)

Friday, November 20

8:30 a.m.

Lead Communities Planning Workshop (with J. Ukeles, S. Fox)

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

Participants: S. Elster, S. Fox, E. Goldring (Arrival 1:00 p.m. Thurs.), S. Greenfield (Arrival 3:00 p.m. Thurs.), A. Hochstein, B. Holtz, D. Marom, J. Meier, A. Naparstek, A. Rotman, J.A. Schaffer, J. Ukeles Arrival 3:30 p.m. Thurs.), J. Woocher, S. Wygoda

## AGENDA

## THURSDAY, NOVEMBER 19

NOTE: Aside from starting and adjournment times, all times are approximate

12:30 (Including Lunch)	THE FIRST YEAR		
NY County Medical Society, Suite 1101 15 East 26th St., 11th fl.	<ul> <li>Overview and Work Plan</li> <li>Desired Outcomes</li> </ul>		
	<ul> <li>Expectations of CIJE</li> </ul>		
	<ul> <li>Pilot Projects</li> <li>Goals Project</li> <li>Other</li> </ul>		
	<ul> <li>Planning with Lead Communities</li> </ul>		
	<ul> <li>Short &amp; Long Range Plan</li> <li>Self Assessment</li> </ul>		
3:30 p.m.	BREAK		
3:45 P.m.	BEST PRACTICES		

4:30 p.m.	COMMUNITY MOBILIZATION AND WORK PROCESS
	<ul> <li>Introduction of Lead Communities Idea into the community</li> <li>Local Mechanism for Implementation</li> <li>Organizational and Process Issues</li> </ul>
5:45 p.m.	GOVERNANCE AND FINANCES
6:30 p.m.	ADJOURN
	FRIDAY, NOVEMBER 20
8:30 a.m. JCCA Conference Room 14th floor	LEAD COMMUNITIES PLANNING WORKSHOP (November 23-24)  Desired Outcomes and Format Participants Program Timetable Evaluation
10:15 a.m.	MONITORING, EVALUATION, AND FEEDBACK
11:15 a.m.	OTHER WORK AND NEXT STEPS    Purveyors  Next Staff Meeting  Assignments  Timetable  Other  The Sama
12:00 p.m.	ADJOURN

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COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 Phone: (212) 532-1961 New York, NY 10003 FAX: (212) 213-4078

## MEMORANDUM

TO: Annette Hochstein Seymour Fox DATE:

November 17, 1992

FROM: Art Rotman

SUBJECT: CIJE and AH's Role in the Lead Communities

At the staff meetings on Thursday I plan to announce that you will be taking a "leading role" in our work in the Lead Communities. In particular, this means that you will provide guidance to all of us in both the design of the work we do and in how the work is to be carried out in the Lead Communities. We are particularly concerned about ensuring that this will be a quality project with substantive content.

On a practical note, since you cannot be in the Lead Communities on a day-to-day basis, all of us here will be implementing the agreed upon design. To facilitate matters, we will keep you posted on our contacts whether by visits or telephone. You, in turn, will offer guidance to me particularly as to whether or not we're on track with the agreed upon approach.

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#### OUNCIL FOR INITIATIVES IN JEWISH EDUCATION .

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

## TELEFAX

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

FROM: Art Rotman FAX #: 619 452

Number of pages (including this sheet) 17

## **MESSAGE:**

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

Warm regards,

Art

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## DRAFT III

## WHAT IS THE LEAD COMMUNITIES PROJECT?

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

#### II. RATIONALE

#### A. IMPROVING EFFECTIVENESS

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

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

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

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

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

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

## B. "MODELS" AS A STRATEGY FOR POSITIVE CHANGE

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

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

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

C. Systemic Change at the Community Level

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

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

To improve Jewish education we need to create integrated service delivery systems and dramatically increase the quantity and quality of Jewish education in the community. 111.

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#### ESSENTIAL ELEMENTS: BUILDING THE LEAD COMMUNITIES

#### A. LEADERSHIP AND COMMUNITY SUPPORT

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

#### B. PROGRAMS: LOCAL PROJECTS AND INITIATIVES

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

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

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

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

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

COST

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

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

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

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

#### C. RESOURCES

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

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

## D. PLANNING

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

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

## IV. THE CONTENT OF THE EDUCATIONAL PLAN

## A. A VISION FOR CHANGE

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

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

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

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

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

articulation of content and related curricular issues

introduction of "Best Practices"

- personnel (recruitment, training [pre-service], compensation, [to include benefits], and related issues) and the required in-service training for all personnel in all programs and in all settings
- integration of formal and informal programs through development of an integrated service delivery system
- identification of best use of the resources of the national organizations, movements, and training institutions
- C. APPROACHES TO EACH SETTING -- WORKING WITH THE LOCAL EDUCATIONAL INSTITUTIONS

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

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

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- Synagogues
- Youth Groups

- RST

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

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

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

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

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

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

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

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

# V. BEST PRACTICES

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

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

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

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

# VI. FOUNDATION LINKAGES AND FUNDING

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

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

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

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

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

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

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

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

# VIII. MONITORING, EVALUATION, AND FEEDBACK

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

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

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

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

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

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

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

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

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

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

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'hone" (212) 532-1961

FAX: (212) 213-4078

# **TELEFAX**

DATE: November 11, 1992 TO: Seymour Fox Annette Hochstein

FAX #: FROM: Art Rotman 619 452

Number of pages (including this sheet) \_\_2\_\_\_

MESSAGE:

At your request we have extended the conference times on the 19th/20th and 23rd/24th. In addition, we have allowed for a session on Thursday at 11:00 a.m. with a limited group. I have also set up a postmortem with the same group.

We have far too many people on the 23rd and 24th. I am suggesting that the "observers" not be seated at the discussion table so that the people who need to be there can be in closer contact with one another.

Thanks for your suggested agenda for the 19th and 20th. I have made some revisions and you will be getting a revised copy within the next day or two.

Using the "Lead Communities at Work" I have begun the process of developing an interpretive document on the work of the CIJE for us all to discuss. I am not sure it will be ready for discussion on the 19th, but if it is, I will send you a copy in advance.

The agenda for the meeting on the 23rd and 24th will be hammered out in the meetings of the 19th and 20th.

Warm regards,

Art

# CIJE MEETING PARTICIPANTS

## THURSDAY, NOVEMBER 19 (11:00 A.M.-12:30 P.M.) JCC Association. Mazer Study. 14th floor

Shulamith Elster Seymour Fox Annette Hochstein Art Rotman Jack Ukeles

THURSDAY, NOVEMBER 19 (12:30-7:00 P.M.) 15 East 26th Street. 11th floor (NY County Medical Society) FRIDAY, NOVEMBER 20 (8:30 A.M.-12:00 P.M.) JCCA Conference Room. 14th floor

Shulamith Elster Seymour Fox Ellen Goldring (from 6:00) Sol Greenfield (from 3:00) Annette Hochstein Barry Holtz Daniel Marom Jim Meier Art Naparstek Art Rotman Jo Ann Schaffer Jack Ukeles Jon Woocher

MONDAY, NOVEMBER 23 (6:00 P.M.-9:00 P.M.) UJA/Federation, 130 East 59th Street, Liff Room TUESDAY, NOVEMBER 24 (8:30 A.M.-4:00 P.M.) JCC Association, Conference Room, 14th floor

# LEAD COMMUNITY PLANNERS

Lauren Azoulai (Atlanta) Steve Gelfand (Atlanta) Chaim Botwinick (Baltimore) Nancy Kutler (Baltimore) Marshal Levin (Baltimore) Howard Neistein (Milwaukee) STAFF/CONSULTANTS (Numbers still to be reduced)

Shulamith Elster Seymour Fox Annette Hochstein Barry Holtz Jim Meier Art Rotman (MON. only) Jack Ukeles Jon Woocher

# **OBSERVERS**

Roberta Goodman Daniel Marom Claire Rottenberg Julie Tammivaara Shmuel Wygoda

TUESDAY, NOVEMBER 24 (4:30-6:00 P.M.) JCC Association. Mazer Study, 14th floor

Shulamith Elster Seymour Fox Annette Hochstein Art Rotman Jack Ukeles



TO A HOCHISTEIN	From Jo SCHAFFER
Co.	Co.
Dept.	Phone #
Fax #	Fax #

MILWAUKEE JEWISH FEDERATION 1 9 0 2 1 9 9 2 recognizing 90 years of service to

the Jewish community

MEMORANDUM

TO: Art Rotman

FROM: Richard Meyer

DATE: November 4, 1992

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

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

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

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

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

HN/RM/nm

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# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

October 21, 1992

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# 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

Jawish Education Task Force

The Jewish community of Milwaukee has established a Milwaukee Association for Jewish The community views the Lead Communities Project as an opportunity to Education

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

to create and Vision and

rame Milwaukee's agendar for Jewish Education for the 1990's, to gain a norad base of support and participation and, to implement a plan that noraves the overall quality of what is offerregand to facilitate new initiatives - areas that a dialess Jewish continuity concerns.

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

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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.<sup>9</sup>

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

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

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

In support of these efforts, CIJE agrees to:

- Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education, Early Childhood Education, JCC programs; Israel Experience; Day School; Campus Programs; Camping; & Adult Education. Information on all areas will be made available between October, 1992 and the end of May, 1993. The lead community will consider the adoption 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.



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<sup>\*</sup> See Appendix A for a brief description of some of the possible areas of content of a Lead Communities Plan.

Page 5

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

The Lead Community agrees to:

and the second second

- Establish a Commission of Seuscher 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 Louist Skinund Care Colling.
- 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 BLE) 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. (which may be the Same Penonas the Planning Coordinated
- 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
- Build the profession of Jewish education, and thereby address the shortage of qualified personnel.

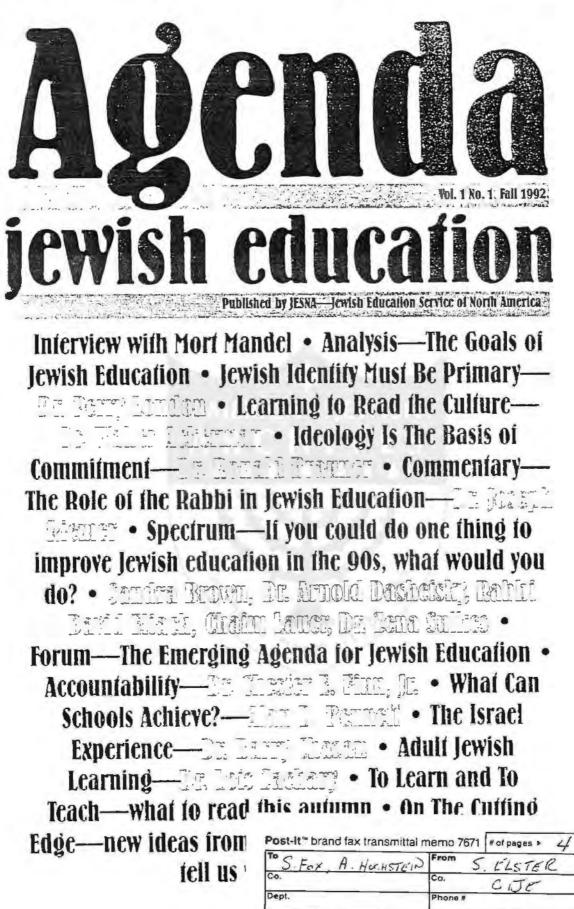
Page 8

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one /community's Commission on Jew a 40% increase in co program. Commun	the communal resources committed to Jewish education. Based on experience in implementing the recommendations of its vish Continuity "significant expansion" should result in at least ommunal resources for Jewish education by the third year action nal resources include regular allocations, endowment funds, local and other sources of local funds.
<ul> <li>Collaborate with CIJ results.</li> </ul>	E on the monitoring, evaluation and feedback system, and utilize the
<ul> <li>Work with CIJE to open set to be a set of the set of</li></ul>	disseminate the results of their experience to other communities.
reviewed by the partners. T	3 and the summer of 1994, the work of the preceding year will be "his Agreement may be terminated at the end of one of these reviews er that the other has failed to perform in relation to this agreement.
CIJE	Federation
By:	By:
Title: Date:	Title: Date:
resources devoted	in and expand the aggregate communal to Jewish education - While it is recognized - already allocates a higher percentage of annu such education than most other communities, T

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Fax #

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10:41 AM

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NTERVIEW WITH MORT MANDEL

I o one is more closely associated with the current drive to put Tewish education and fewish continuity at the top of the lewish community's agenda than Mort Mandel. For nearly a decade, Morton L. Mandel has made the revitalization of lewish education his "cause." He brings to this cause years of experience at a toplevel Jewish, business, and civic leader; almost boundless energy and enthusi-

and readiness to step forward and enlist others to line up beside him in unprecedented coalmons. As the following interview reveals, Mr. Mandel, though intensely Jewish, was not always a fewish education activist. He is in a sense, therefore, an exemplar of both the problem he has tackled-how to get the leadership of the Jewish community serisusly engaged with Jewish educationand its solution. We spoke with Mort Mandel about the development of his lewish commitment, about the initiauves for Jewish education he spearheaded, and about his hope for the future and for his fellow leaders.

E: Let's start at the beginning. What shaped you Jewishly as you were growing up? MLM: There's no aoubt that the home I grew up in was a very important influence on me. My parents were very Jewish in the daily living sense. There was a very thick lewish atmosphere—Jewish ambience. fewish neighborhood. I went to schools that had large numbers of Jews.

My whole world was full of lewish customs, lewish traditions, holidays were big things. I grew up in a protective environment, a segregated environment, to some extent. I soaked up Jewish education ov osmosis, not by going to school. When I was approaching Bar Mitzvah age, probabiy when I was ten, I went to cheder We all hated it—we tolerated it out of respect to our parents. I was Bar Mitzvah, I didn't want to go any more and my parents didn't insist.

I had a wonderful Jewish education growing up in a home with Jewish values. Jewish traditions, Jewish history, Jewish customs, Jewish songs, Yiddish songs, a real thick Jewish-Yiddish connection. I still say Yiddish words *mechaya* and all that— with a twinkle in my eye because somebody else like me has the same twinkle when we use those words. It's a very warm, fuzzy kind of memory.

AJE: How did you actually become trivolved formally in (ewish leadership? There are many other people who grew up under similar circumstances, most of whom did not become a Mort Mande., MLM: Let's see...in the fourth grade. I was president of my class, fifth grade you couldn't nominate yourself again, so sixth grade I was president. Ninth grade I was president of the student council, eleventh grade I was president of my senior class--it just happened to me. I guess I enjoyed it and to become active in Jewish communal life was probably not a Jewish expression of anything...it was just natural. AJE: What were the first areas that you actually got involved in? MLM: I got out of the service in 1946 and I became active in the Jewish Federation campaign. I came up right from the bottom, as a solicitor in a low ranking, invisible division of the campaign, the Young Adult Division, I was 23 and 1 became chairman of the Division. I started that same year in the United Way and Leventually became

president (1978). I guess it's my drive, my interest. A lot of people are interested—a lot of people aren t. AJE: How did the move come about to Jewish education? Eve heard that this was not something that wits always on your dist of involvements, MLM: No. it was not premeditated; it was a surprise. In fact, I was not a particularly staunch

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During the nineties, the first objective is to have in place the appropriate network of organizations and institutions to exploit this opportunity to strengthen Jewish continuity and help achieve the quality of Jewish life we all want.

supporter of the Jewish day school idea, being more generalist in my thinking. I was not supportive of it even up to and including my presidency of the Federation (1976). Most of my colleagues, the people who were the real leaders of the community, tolerated Jewish education. It was not where

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the most active, most highly qualified, most visible leadership was at

In 1978 ( became president of CIF, and in 794 was on the Board of the Jewish Agency. At my very first meeting, Arveh Dulzin, Chairman of the Executive, announced that the State of Israei and the Jewish Agency were forming a fund for Jewish education in the Diaspora, because they were worried about the trend lines. They didn't have the recent CJF study, but they knew already—everybody knew what

Committee, I was chairman, and I was going to invite some other people to be consoltants. I got Herb Millman, Carmi Schwartz, Seymour Fox, and Danny Tropper.

We drafted a statement of purpose, objectives, what would qualify (for support), what wouldn't, the kind of process we would go through. I held that lob about nine years, during

# they are there, they will always be there to pick up the torch of Jewish education and Jewish continuity. This is a time for action. That's the message.

was happening. They set aside \$10 million—five and five—for Jewish education in the Diaspora to support Jewish continuity. I held my hand up and I said: This is the first meeting of the Jewish Agency Board of Governors I've attended, and if this is the kind of thing you do here I am really honored to be here.

Next thing I know I'm asked to be chairman of the Steering Committee. I said, let me bring consultants. He said, bring approach you beam. He announced there was a Steering which the Joint Program sponsored the World Conference for Jewish Education (1984 ed.)—the first ever of its kind. The Jewish Agency adopted a fifth portfolio—Jewish education. They appointed a first Committee on Jewish Education in their history which I chaired, while I was chairman of the Joint Program. We gave away money, mostly to places in great need, and for innovative ideas. Throughour the world Jewish education was in virtion of the Joint Program. Sport field, a jewel there—but mostly third rate.

In the early eighties, when I got into lewish education scrinusly, the recognition was growing in me that this was one way to attack the negative trend line-a point of entry, a way to intervene. Not necessarily the answer, but part of the answer. That's how it happened. AJE: Let me skip ahead a bit. I know we could talk about your work at what was then IWB and the Maximizing Jewish Educational Effectiveness process, but I want to move on to the Commission on Jewish Education in North America, This was again truly unprecedented. What ledyou to decide that we needed something of this scope and ambition, something that would bring leadership. together on an unusual trans-institutional basis? MLM: In the mideighties. I was talking to other serious players-professionals, lay leaders. foundation leaders-there was no track for any of us to run on. We dian't want a single uni-track process, but there was nothing clear. I was out of the lewish Agency, talked about it with my family, and we decided to putthe important parts of our philanthropic resources into Jewish continuity, Jewish education. The Commission was born out of the need to establish a clearer picture of how to intervene in practical ways-how to produce systemic change, to enable the system to cope. We, the Mandel family, always knew we were going to take one of the recommendations, one of the findings of the Commission, and pursue it. AJE: The Commission report. A Time to Act, has obviously been a seminal document in terms of its recommendations, but as you look back on it now, what do you see as the Was there something beyond the

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port and the recommendations? ILM: I think the medium was the essage. The Commission, there old have been two or three other oups as qualified, though this cerinly was a qualified group, was a typening. It was a happening because i who was there, their unbelievable tendance, their involvement, the tendance, their involvement, the tendance, their involvement, the tendance with the Commissioners. he fact that this group spent two ears to author a report did a lot for ewish education in America. That

of gain, that kind of foothold ould be squandered. We probably have the decade of the nineties-but hat's all. As important as the report vas, that serious people came together o devote their time to Jewish educaion. Jewish continuity, was very mportant. That so many outstanding accomplished people came-was a major achievement of the Commission, and this sent quite a message, AJE: Now, I'd like you to look ahead. The Council for Initiatives in Jewish Education (CIJE) is up and running. It's beginning to get to the "-art of its work with the Lead communities and several of its other projects. Where would you like it to be five years from now? And in broader terms, where would you like to see Jewish education a few years down the road?MLM: I would like to see a strong established apparatus, a system of agencies-well led, well financed. working cooperatively together. CIJE is certainly needed to help catalyze the North American Jewish community, along with other constructive forces, to implement the report, to help evolve. help design how the North American Jewish community responds to Jewish education and Jewish continuity.

During the nineties, the first objective is to have in place the appropriate network of organizations and institutions to exploit this opportunity to strengthen Jewish continuity and help achieve the quality of Jewish life we all want. That's the mission for the nineties, my personal mission as well, to be one of the architects of this design in terms of structure, support, etc. AJE: Let me pick up on the issue of the design. One of the unique dimensions of your leadership is how much you have been able to bridge the worlds of Israel and North America. The Mandel Institute for the Study and Advancement of Jewish Education that you've recently established in Israel represents again something that is to my knowledge unprecedented: a world institute for lewish education centered in lerusaiem. How do you see the role of Israel as this decades unfolds? What does Israel have to contribute to us. and do we have something to contribute to them? MLM: Definitely. Israel will be a major center of Jewish thought, ohilosophy, activity, leadership, and so will America. And so could England, France, Australia, .... We could have Jewish communities full of lay leaders, scholars, academicians. professionals-interactive, relating to each other the same way we have in the university setting-a Stanford, a Harvard, a Brandeis, an Oxford, a Cambridge, a Hebrew University-teams of scholars competing with each other in a collegial way. It's like fighting cancer. A large number of brilliant cancer research centers and teams working today around the world, competing with and complementing each other. They relate to each other; they have journals. it's a very healthy, exciting competition in certain phases of our life. I would like to see that in fewish education. Now there is more power in Israel than any other place in the world, probably about sixty, seventy people. men and women in Israel, who make up that power. Why aren't there sixty, seventy men and women in America-maybe a hundred-we are a bigger lewish community? One of the Mandel Institute's missions is to foster this kind of healthy competition. I am trying to influence some of my friends in other countries to have a commission on Jewish education. I tell them if you can get what we've got in America in your own way-for example in your own UK way, adapted to the UK environment, customs, traditions-it might help pull your community together. Why can't they do that in France and in Australia? As a matter of fact some tolks in the UK are taiking to us now about just this. That's my dream, AJE: One final cuestion. There are a lot of leaders out there, many of whom have already bought in to what you have been arguing and advocating, some of whom haven't really yet. They are where you were, as you described it, perhaps thirat years ago. What's the message you want to leave with them? MLM: Along with the other major, critical needs that exist in the Jewish community-they are there, they will always be there-pick up the torch of Jewish education and Jewish continuity. This is a time for action. That's the message. AJE: That, I think, is a very fitting place to end. I want to thank you on behalf of Agenda: Jewish Education and all those whom you have and will continue to influence to get involved and to take action.

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TO & HOLMSTED	From Li Rosman)
Co.	Co.
Dept.	Phone #
Fax #	Fex#

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

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TASK	RESPONSIBILITY	KEY MILESTONES	ISSUES/COMMENTS
LEFTER OF UNDERSTANDING Draft #1 Draft #2 Negotiation Final Signing	UAI (Ukeles) UAI (Ukeles) Elster & Ukeles Rotman as needed Rotman & CIJE Lay Leaders	10/1 & 10/2 10/15 November December	Link to Local Event
PLANNING GUIDELINES Draft #1 Draft #2 Review with community planners Final	UAI (Meier) UAI (Meier) UAI (Meier)	10/15 11/4 11/18 11/23 & 11/24 11/30	Workshop with Planning Directors
PRESENTATION TO COMMISSIONS GA Forum & Event Local events	Rotman Rotman & CIJE Lay Leaders	11/12 & 11/13	Community-specific events to introduce Project to various publics; Link to Signing
CIJE STAFF COORDIATE Executive staff Program Directors	Rotman Rotman & Elster		Wkły mtgs (Rolman, Elster, Greenfield & Ukcles)
BEST PRACTICES Design (inform & access) Inform Access	Elster, Holtz & Ukeles Elster & Holtz Elster & Holtz		Need to finalize timetable for deliverables and design methods to inform communities and create points of access

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Page 1 of 3

TASK	RESPONSIBILITY	KEY MILESTUNES	ISSUES/COMMENTS
COMMUNICATION & PR Identify Publics Communications Plan Implement	Elster ? ?		Use of outside consultant/firm; Assignment of responsibility; Coordination (if any) between Local PR in each community and overall CUE plan
COMMUNITY CONSULTANTION ("TALENT BANK") Concept Document Assign Responsibility Manage System Locate Individuals Inform Communities Access	Meier Rotman ? ? ? ?	November early November	Design links to Best Practices
CONTINENTAL/COM PLANNING PROCESS Meet with Planners Meet with community lay leaders ("the Seminar") Community planning process	Ukeles & Elster Rolman & CIJE Lay Leaders Elster & Ukeles	11/23 & 11/24 January ongoing	For all: agenda, invites, location, dates
LIASION TO NATL PESOURCES III/I. Organizations Denominations Senior Advisors	Fister	ongoing December	Link to community consultation (talent bank); who pays for what
FINANCIAL RESOURCES  Nat'l Foundations  Local Foundations & individuals	Naperstek	ongoing	Process for linking local needs definition to foundation interests; funding Bow; CUE as recipient; and CIJE as broker

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Page 2 of 3

TASK	RESPONSIBILITY	KEY MILESTUNES	ISSUES/COMMENTS
MONITORING, EVAL & FEEDBACK	Rotman	ongoing	
<ul> <li>Introduce field researchers to community</li> </ul>	Elster & Rotinan	late Sept, early Oct	Include baseline portrait
<ul><li>Dev foedback loop</li><li>Set terms for first report</li></ul>	Gamoran & Goldring Gamoran & Goldring	October October	

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Page 3 of 3

# טופס מעקב

טופס זה מיועד למקרים בהם מסמך אחד יכול להיות רלוונטי ליותר מתיק אחד, ומהווה בעצם שלד למסמך המקורי המתוייק בתיק אחר.

Art Rotman : 100 (1 6/11/92 :תאריך (2 1, eard co. ~ Set store istras 1112's reice נזו הנדון: (3 1Gob? 4) תוכן מקוצר: 92/11/92 2411/92

(sad Community המסמך המקורי: Lead Community) שם התיק בו מתוייק המסמך המקורי:

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

 Mailing Address:
 163 Third Avenue #128
 New York, NY 10003

 Phone:
 (212) 532-1961
 FAX:
 (212) 213-4078

# TELEFAX

To:	Annette Hochstein	Date:	November 6, 1992
From:	Arthur Rotman	FAX #:	011 972 2 619 951
	Number of pages (including this	sheet) 🗾	54

# MESSAGE:

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

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

We agreed that the documents that you will want to use with the planners should be the subject of the discussion at the meetings on the 19th and 20th. You undertook to develop these documents by either editing what we already have available and/or creating whatever new documents you may find necessary. These documents would, of course, have to be in the hands of our staff several days in advance of the meeting on the19th which would then call for them being faxed by November 13 the latest.

It is all yours.

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

Looking forward to talking with you and Seymour.

[draft 10-21-92]

# Lead Communities Planning Guide Preliminary Outline of Contents

#### I. Analysis of needs

- A. Profile of current community demographics:
  - General population characteristics: cohort sizes
     Other Jewish education sub-group sizes (e.g., early childhood, supplementary school, day school, lay leaders, adult education learners, communal service professionals, college-age youth, other special groups)
- B. Profile of present Jewish education personnel

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

- C. Program capacities and participation rates (formal and informal programs, by institution/program)
- D. Estimate of community need/demand (in categories of A2 & B1)
- E. Gaps [D C]
- 11. Assessment of strengths and weaknesses (What works, what doesn't work)
  - A. Areas for assessment
    - 1. Students and programs (e.g. levels of attainment)
    - 2. Personnel
      - · by program: quality, assets and limitations
      - · professional development programs and opportunities
    - 3. Community support
      - · Lay involvement and leadership
      - · Coordination and collaboration within system
      - · Funding: Amounts and participation rates
    - 4. Other system and planning issues (e.g.:)
      - Fundraising and allocations
      - Information (system capabilities)
      - · Uses of technology
  - B. Exploratory comparisons (Programs and performance in other places)

- III. Strategic issues (confronting and resolving critical choices)
  - A. Identify strategic choices
  - B. Resolve strategic choices
  - C. Develop community-wide mission or vision statement(s)
- IV. Establishing strategies and priorities
  - A. Formulate strategies
  - B. Establish priorities
    - 1. Population groups/program areas
    - 2. Personnel
    - 3. Community support
- V. Designing programs (to address priorities)
  - A. Initiate program ideas or strategies/preliminary proposals
    - 1. Leadership (lay and professional) and community support (e.g.:)
      - coalition building
      - recruitment (of leadership and community involvement)
    - 2. Programs for personnel
    - 3. Programs (e.g.: Israel trips, innovation)
    - 4. Planning and evaluation
    - 5. Financial resources
  - B. Select program priorities/phasing
- VI. Prepare implementation strategy: multi-year framework, first year action program
  - A. Program/Task
  - B. Responsibility
  - C. Cost and funding
  - D. Timetable
  - E. Performance Management
  - F. Program Evaluation
- VII. Next Steps: Implementing the plan
  - A. First-year action plan oversight
  - B. Mid-course modifications
  - C. Prepare second-year action plan
- **APPENDICES**

# General format for each section

Section heading

- Rationale: What the section is about, why it is important, how it relates to the planning process.
- Deliverables: Important junctures, or deliverables, and when they must be completed to keep the project on schedule.
- Benchmarks: Critical requirements and optional steps/tasks to achieve the benchmarks for the phase.

Methods: "How" to do the task.

Comment Box	
For elaborative comments, suggestive hints, or enhancement options.	

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

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

Examples:

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# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

 New York, NY
 10003

 hone:
 (212)
 532-1961
 FAX:
 (212)
 213-4078

# TELEFAX

TO: DATE: Annette Hochstein November 5, 1992

FAX #: 619 452 FROM: Art Rotman

Number of pages (including this sheet) 13\_\_\_\_

MESSAGE:

LET'S DISCUSS THE ATTACHED.

REGARDS.

ART

# MEMORANDUM

То:	Art Rotman Shulamith Elster Sol Greenfield
From:	Jim Meier
Date:	November 4, 1992
Re:	Talent Bank

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

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

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

See you tomorrow.

[draft: 11-4-92] ---- for internal discussion only ----

# Talent Bank for Lead Communities

#### Introduction

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

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

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

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

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

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

# Components of the System

1. <u>Areas of expertise</u>: The categories in which expert assistance is likely to be needed. Expertise is grouped in two broad categories: a) "client" expertise, and b) subject or skill expertise. These categories encompass programs (e.g., starting with "Best Practice" areas), curricular areas, as well as specialists in areas of supervision (e.g., training, personnel evaluation), and administration (e.g., budgeting, fundraising, negotiation, systems development). 2. <u>Selection of Experts</u>: This section proposes protocol for identifying and contacting experts about their willingness to assist in this project. The abilities, strengths and limitations of experts in a fairly large number of areas are described according to a standardized and succinct format for entry into the database.

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

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

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

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

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

## Future steps:

- . Elaborate funding formula (see No. 5).
- . Publish Talent Bank directory.
- . Expand to include institutions as well as individuals.
- . Expand to other-than lead communities.

. Develop ways a community can replenish its "account" other than by new CIJE allocation (e.g. consulting assistance to other communities; developing and/or disseminating curriculum materials to other communities).

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# Attachment 1

# AREAS OF EXPERTISE

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

literature Mideast Affairs

# Attachment 2

# SELECTION OF EXPERTS

# Criteria

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

## **Nomination Process**

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

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

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

Short and easy nonunation form would ask:

Б

# 4. Invitations:

• Steering committee reconvenes to decide on names: a) proceed with invitation, b) maybe, more information needed, c) no.

• Chief Education Officer, or delegate, contacts selectees about willingness to serve on Talent Bank, and if so, for more information (see below).

• Phone invitation, followed by standard letter, covers:

- . Purpose of talent bank
- . Obligations/responsibilities of experts
- . Committee's perception of nominee strengths
- . Talent bank listing
- . Compensation for services
- . Follow-up information/profile required from expert

Follow-up letter will also include information on:

- . Training and support (none contemplated)
- . Reporting (if contemplated)
- . Standard contract (see attachment 3)
- 5. Expert Profile:
  - Expert asked to submit the following information:
    - . Resume
    - . Talent bank description for data bank

#### Attachment 3

# TERMS OF AGREEMENT

#### 1. Compensation Scale:

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

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

Lay leader

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

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

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

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

#### Attachment 4

# **RESOURCE DATABASE**, and **DISTRIBUTION**

#### Set Up Systems

1. Hire systems consultant to identify software, set up talent bank expert database (e.g., sortable by variety of descriptors), and set up management tracking systems for accounts.

2. Secretary enters information into talent bank.

3. Printout and review profiles of experts.

4. Distribute first installment of talent bank to lead communities.

# Update/Maintain Systems

5. Add new expert profiles to talent bank as they are identified.

6. Track talent bank use, including withdrawals by lead communities, and use of experts.

#### Plan, Prepare, and Issue Directory

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

#### Directory

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

### Attachment 6

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### MANAGEMENT PROTOCOLS

### **Summary of Process**

1. Talent Bank Profiles: CIJE issues profiles on available experts to Lead communities.

2. <u>Pre-Approval</u>: Lead community contacts CIJE program officer by phone to discuss need for expert assistance in specific area. Community indicates:

- Reasoning behind identification of this area of need.
- . How need relates to community priorities or action plan.
- What is desired from expert, objectives to be accomplished.
- Whether they have specific person in mind.
- \* How many days of expert are needed; what is agenda.
- What expert needs to know in advance of visit.

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

3. <u>Community Engages Expert</u>: The community directly contacts one or more Talent Bank experts, selects the one(s) it considers most fitting, settles dates and logistics, forwards any appropriate background materials to the expert, and alerts CIJE about finalized plans.

4. Expert visits community.

### 5. Expert sends receipts to CIJE for reimbursement.

6. <u>Evaluation</u>: Community completes and forwards to CIJE short evaluation form on effectiveness of expert.

### Talent Bank Account

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

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

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

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

### **CIJE Management Roles**

CIJE plays several roles in managing the account:

1. Acts as Program Officer:

• May, based on monitoring reports or other knowledge of community, urge community to obtain assistance of a particular expert.

- Approves of "withdrawals", meaning approval of the use of an expert.
- · Receives report from expert following visit .

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

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

#### Program Officer Role

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

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

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### Attachment 7

### TIMETABLE FOR LAUNCHING TALENT BANK

	Pressing Tasks	Completion date
0.	Preliminaries Approve overall plan Hire p-t coordinator and clerical help (See 4. Allocations and Budget)	mid Nov.
1.	Define areas of expertise	end Nov.
2.	Select experts: first round . Set up steering committee . Solicit nominations . Review initial nominations . Invite experts . Obtain profile information from experts	mid Nov. late Nov. early Dec. mid Dec. late Dec.
3.	Terms of agreement . Develop standard agreement . Send to experts following acceptance	early Dec.
4.	Systems/database . Hire consultant . Set up system . Data entry . Distribute listing	late Nov. late Dec. early Jan. mid Jan.
5.	Allocations and Budget . Decide on budget . Identify/hire p-t coordinator . Identify/hire p-t clerical . Announce allocations to LCs	asap early Dec late Dec. early Jan.
6.	Management Protocols . First draft . Final draft . Distribute	late Nov. late Dec. mid Jan.

# ailing Address: 163 Third Avenue #128 - New York, NY 10003

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

## TELEFAX

TO: Annette Hochstein DATE: November 5, 1992

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

Number of pages (including this sheet) \_\_\_\_\_

MESSAGE:

LET'S DISCUSS THE ATTACHED.

REGARDS.

ART

To:	Art Rotman
From:	Jack Ukeles Jund
Date:	November 3, 1992
Re:	att'd
cc:	Shulamith Elster Sol Greenfield

Jim Meier

#### 

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

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

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

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

NOU 4 192 9:23

12122608760 PAGE.001

### Draft-11/3/92 MEMORANDUM

To: Friedman Meyers Sarnat (separate memos)

From: Art Rotman

Date: November 6, 1992

Re: Lead Communities: next steps

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

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

You may also want to consider:

. . . . . . . . . . . . .

621300

om : Ukeles Associates Inc.

PHONE No. : 12122608760

Nov,04 1992 9:24AM P03

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

[for Baitimore letter only]

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

[for Atlanta letter only]

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

[for Milwaukee letter only]

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

[for Baltimore letter only]

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

[for Milwaukee and Atlanta letter only]

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

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

## Draft-11/2/92 MEMORANDUM

To: Steve Gelfand Marshall Levin Howard Neistein

From: Jack Ukeles

Date: November 6, 1992

Re: Lead Communities Planning Workshop

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

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

### Title: LEAD COMMUNITIES PLANNING WORKSHOP

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

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

### Participants:

Lauren Azoulei Steven Gelfand Chaim Botwinnick Nancy Cutler Marshall Levin Howard Neistein Shulamith Elster Sol Greenfield Jim Meier Jack Ukeles Atlanta

Baltimore

<u>X.22 5</u>

Milwaukee

- Location: JCC Association 14th Floor (conference room) 15 East 26 Street (between Madison Avenue and Fifth Avenue) New York City
- Logistics: CIJE will cover costs at the meeting (food and hotel); the community is expected to cover transportation costs. Joanne Schaeffer in our office is handling hotel arrangements. She will be booking a room for each out of town participant in the \_\_\_\_\_ Hotel on \_\_\_\_\_ Street. It anyone prefers to make their own arrangements, please let her know as soon as possible.

\_\_\_\_\_

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## Program

Monday, Nove	mber <u>23</u>		
8:00PM	Welcome Workshop Introduction		Art Rotman Jack Ukeles
6:30PM	Dinner		
7:30PM	Towards Systemic Change in Jowish Education The Genesis of the Load Communities Concept		Seymour Fox Annette Hochstein
9:00PM	Open Discussion of the Load Communities Project		Shulamith Elster
Tuesday, Nove	mber 24		
8:00AM	Cotfee		·
8:30AM	Review of Lead	d Communities Planning Calendar	Jack Ukelea
9:00AM	A sketch of eac education	ch Lead Community as a context for Im Atlanta Baitimore Milwaukee	proving Jewish
10:30AM	A Portrait of a Lead Community [Plan]		Shulamith Eister
11:30PM	Planning Guide		Jlm Meier
12:30	Lunch		
1:30PM	Connections	Introducing Best Practices The Talent Bank Continental Educational Resources Continental Financial Resources	Barry Holtz Jim Meler Shulamith Elster Shulamith Elster
3:00	aeuaal		Jack Ukeles
		Toward a common language: what de "Improvement"; "system"; "settings" "j "programs"	o we mean by populations" "and
		How should the CIJE staff Interact wi	th the Community staffs
		When should we work as a foursome doubles?	and when as a set of
		Where in the process it makes sense specific approach and where it make North American Approach.	
	٠	Agenda: Timing and content of Meet and lay leadership	ing in January with execs

-

### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

November 2, 1992

### MEMORANDUM

DATE:

TO: Shulamith Elster Seymour Fox Ellen Goldring Sol Greenfield Annette Hochstein Barry Holtz Jim Meier Art Naparstek Jack Ukeles Jon Woocher

FROM: Art Rotman SUBJECT: CIJE Planning Meeting

This is to confirm our meeting for Thursday, November 19, 3:00-8:00 p.m. and Friday, November 20, 9:00 a.m.-12:00 p.m. The Planning Meetings will take place in the JCC Association Conference Room at 15 East 26th Street.

I look forward to seeing you then.

### <u>טופט מעקב</u>

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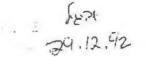
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טופס זה מיועד למקריס בהם מסמך אחד יבול להיות רלוונטי ליותר מתיק אחד, ומהווה בעצם שלד למסמך המקורי המתוייק בתיק אחר.

Art rotman	ו כותב המסמך:	۵۵ (	(1
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בו מתוייק המסמך המקורי: \_\_\_\_\_\_\_ (5)

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### Mandel Institute

מכון מנדל

Tel. 972-2-617 418; 618 728 Fax: 972-2-619 951

Facsimile Transmission

TO: THULA TITA GUSTER	Date: Arc 29 14 1592
From: SNIJEL UTEDAN	No. Pages:1
Fax Number: 001 212 213 43 78	

Dear Shulamith,

I hope this fax finds you in good spirit and health, after a great ( and well deserved ) vacation.

The purpose of this short memo is to respond to your fax from December 3rd re Eisenstat's speech at the G.A.

I think it would be a great idea to have this text published under the " imprimatur " of CIJE .

Once you finalize your decision I would appreciate if you could let me know if and how this nice article will be published.

Thanks,

Crist

# TELEFAX

DATE:

FROM:

12/28/92

SHULAMITH ELSTER

FAX #:

Number of pages (including this sheet) \_\_\_\_3

TO:

Annette Hochstein

Art Naparstok

Andrew Schwartz

Stuart Eizenstat

1 THOUGHT YOU WOULD FIND THIS INTERFSIINC

261 85 283

# Jewish Groups Urged to Attract Young People or Risk Withering Away of Cultural Heritage

### BY VINCE STEILE

NEW YORK MERICAN JEWISH CROUPS need to mikks dramatic changes in their educational and social programs so they can attract more young Jawa, said leaders of the Council of Jawish Federations at their ennual meeting here.

If such changes are not made. Jawish institutions won't be able to mise the money they need to support efforts here and abroad, the leaders suid Withi't more, a few speakers suid they were worried that Jewish colture could wither away if Jewish groups didn't quickly change their ways.

Responding to growing evidence that young Jews are not active particleants in traditional Jewish institutions like synagogues and Jewish community centers, the council's leaders called for

efforts to beef op Jewish education programs und expand fundratising efforts to reach people who have not traditionally given to comparise of local federations. Some federation officials void that to pay for more and bigear Jawish education programs. Jowish groups may have to operact large scale fund-raising campaigns, either nationally or locally.

"We face a major challenge: How do we survive as a strong Jewish community in an open acciety?" asid Morton L. Mandel, the council's former president. "Our community has the

freest environment of any Jewish commonity, and it is a challenge that maybe has in it the yeeds of our demise." sold Mr. Mandel, chalrman of Premier Industrial Corporation in Cheveland. Hereuse Jows are more welcome in most social, business, and educational Institutions than nt any time in history, many Jews are loss likely to become involved in Jewish institutions than thay once ware, he said.

#### Reed to Reach Unaffiliated Jows

Last year, the council released a study, the "Council of Jewish Federations 1990 Population Survey, that sent a chill through many local Jewish federations. The study showed that, among Jews who were married between 1985 and 1990, 32 per cent had married non-Jews, and among Jews who had children in mixed marriages, only 28 per cent of the children had been relead as Jews. Given those and many other troubling statistics, some appeakers said that federations must be much more agaressive in creating programs to reach out to unefflinged Jews.

Seld Stuart E. Eizenstat, a Washington lawyer who was domestic-policy adviser to Provident Jimmy Catter and across on the board of the use Federation of Oreater Washington: "We all carry a heavy burden of having failed to react more urgently to the evidence which filtered into our coustry before and during World War II, about Nazi intentions and actions to destroy the Jaws of Europa. And in the process we lost a third of all the Jews in the world.

"Faced today with a very different threat, one more subtle, without clear external enemies, but a threat nevertheless to the survival of meaningful Jawish identity in the United States, we continue to act as if no crisis is upon us at all.

"A huge bombahell was dropped in our midst-

the CF national Jawish population survey—and yet our Jawish institutions and issuership have reacted as if a popular had sounded.

"Only a major sea change in the priorities of the American Jawish community, which will place Jawish education at the top of the Jawish agenda, will provide any hope against the mounting tide of assimilation which threatens to engulf as all."

#### Jewish Education 'Weefully Inedequate'

In addition to the Jewish population survey, Mr Eleanatat pointed to another study, which called for a migor overhaul of the Jewish education system. He compared the report, "A Time to Act," published two years upo by the Commission on Jewish Education in North America, to "A Nation at Risk," the landmark report that has sparked many afteris to reform the public schools. Neither

the education study nor the poputation survey has provoked a sufficient response from Jewish organizations, he said.

"If the United States is a notion at risk because our oducalion system is insidequate to the challenges of the global economy of the 21st century, against competitors with a fur better education system, then how much more are we, as a Jawish community, at risk because of a waefully inadequate Jawish education system in the competition we face against assimilation and indifference," sold Mr. Eizenstat.

He sold that compared to a generation ago, a much smaller percentage of Jawish children go to Jawish achoost. For those who don't go, afterschool and other supplementary educational programs are insideaute, he sold.

Mr. Bizenstat called on Jewish fedurations to take these actions to improve the Jewish educational system;

➤ Provide increased infunctial support for lewish education, because "priorities can't be estualished by therease, they have to be demonstrated by money."

■ Require their leaders to have a thorough knowledge of Jewish history, culture, and religion, in order to serve in high positions, both at the local and national level. "Jewish leaders cannot set un example if they thomselves are educationally itliserate," he said.

► Allow donors to current & portion of their unitual contributions for Jawish aducational programs, avon though in most cases, federations are reductant to give donors much choice in saying precisely where their contributions should go.

If local federations refuse to allow donors in direct their contributions to education, the Council of Jewish Federations should start a nationwide fund-taising campaign to build Jewish education programs, he said. He suggested that the drive be patterned after other special campaigns the United Jewish Appeal has run, such as Operation Excodus, a \$1-billion fund-raising campaign to help reserved Jews from the former Soviet Union and Ethiopia in Jersel, and Operation Moses, a \$60-million fund drive that financed a covert rescue of Ethiopian Jews in 1984.

The Council of Jowish Faderations has established a special committee, the Commission on Continued on Page 13

"Faced today with a very different threat... to the survival of meaningful Jewish identity in the United States, we continue to act as if no crisis is upon us at all."

# Jewish Groups Urged to Attract Young People

#### Continued from Page 7.

Jewish Identity and Continuity, to guide the council's response to its lutest challenges. Under its chairman. Marvin Lender, former coowner of Lender's Bagels and president of the United Jewish Appast, the commission will oversee two committees: the Task Force on Intermatriage and Jewish Affiliation and the Task Force on Servjees to Jewish University Students Neither committee is intended to recommend specific programs, but they will ancourage local Jewish Institutions to collaborate in responding to the needs of students and intermartiell couples.

GIVING

#### Ohanges in fund Raising

Several spatkers here called on Jewish federations to make big changes in the way they rules money. Some said that if the Jewish gradps want to continue to be succosside an fand runders, they will have to fanor their appeals to a broader Jewish audience than they life reaching now.

By using modern marketing techniques, lewish tederations would be better able to reach lews who have not traditionally given to federation campulgns, said Steven Levine, president of m.croMarketing, a nurketing company in Bala Cynwyd, Pal, and a volunteer at the Jewish Pederation of Greater Philsdolphis, Mr. Levins ettiloloud Jewish federations for using almost all of their marketing budgets to reach the 10 per cent of fews who already give to federation campaigns, not the 90 per cent who do not give,

He said that a study in the Philedelphis area found that many Jowa who did not give to the federation were very philanthropic, with a majority giving to 10 charities or more such year. To reach them, the federation pluced advertisements in The Philadelphia Inquirer, and on television and radio stations, coupled with direct-mail appeals and telephone solicitations.

#### Use of Computer Techniques

Instead of dividing up the directmail appeal on the basis of people's jobs—as some Jewish federations do—Philadelphia used sopalaticated geo-demographic computerscreening rechtiques. By using computer data bases to classify potential donors into categories based on the general thanels! and social characteristics of people who live in particular neighborhoods. Mr. Levine said, the federation was able to design a highly successful mult campaign.

For example, the federation sent one letter to potential donors in suburban and sural areas surrounding Philutotphic and another to people living in the oily. For urban gwelters, the appeal areased vocial services financed by the federastion, such as child-care programs and services for the elderly, while lotters to rural and suburban people said that "a true sense of community should not end at the county lind."

At a total cost of \$129,000-in-

cluding the print indivertisements, television and radio spots, computer screaning, fund-raising letters, and telemutketing—the federation received \$1.4-million in gifts from 2.600 new denors.

Mr. Levine said miny federations had fuiled to keep up to dute with changes in marketing and communications techniques, nelieving that good marketing is just common vense. He said that the Philadelphia campaign was proof that federations should rely more on professional marketing and less on informal efforts.

Even so, Jewish federations are still among the most effective fund-raising organizations in the country. Last year, combined contributions from local federations, amounting to \$648-million, made the sational United Jawish Appeal the country's biagest fund-raising group, securiting to The Chronicile of Philantheneys reaking of the 400 charities that oring in the most private money (November 3).

#### Long-Term Challenge

The long-term chailenge for Jews ish organizations is to be an successful at raising Jews as they are at raising money, said officials at the meeting hore.

Suid Shakhuna S, Curdin, former president of the council: "We are very sophisticated in the federation community in fund raising. We have tremendous campaigns. I suggest that we view lewish renewal. Jewish continuity, Jewish identity, as a campaign."

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

FAX: (212) 213-4078

# **TELEFAX**

DATE: 12/24/92

FROM: SHULAMITH ELSTER

FAX #:

Number of pages (including this sheet) \_\_\_\_\_

SHMUEL WYCODA

TO:

IN CASE YOU HAVE NOT YET SENT THEM, PLEASE SEND ME THE PAPERS FROM THE EDUCATED JEW PROJECT AND SAMPLES, IF ANY, OF THE WORK DANNY IS DOING TO "TRANSLATE" THESE INTO EDUCATONAL TERMS/PRACTICE.

THANKS AGAIN

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing Address: 163 Third Avenue #128 • Phone: (212) 532-1961

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

# **TELEFAX**

12/23/92 DATE:

**FAX #:** FROM: SHULAMITH ELSTER

Number of pages (including this sheet) \_\_\_\_

TO:

Annette Hochstein

More news from Milwaukee. Jane Gellman is co - chair of local committee



December 18, 1992

Dr. Shulamith Elster, Director CIJ-#128 163 Third Street New York, New York 10003

Dear Shulamith:

I have some exciting news to share with you. We announced to our faculty earlier today that we are planning a staff trip to Israel from June 19, 1994 through July 2, 1994. This is, as you can imagine, a dream come true, thanks to the generosity of one of our families, Larry and Jane Gellman. They have committed themselves to funding one-third of the cost, approximately \$25,000; the staff is being asked to pay for one-third, again approximately \$25,000, through a payroll deduction plan to begin in January, 1993; the challenge before us is to secure a source of funding for the remaining third, again, approximately, \$25,000. I am hoping that you, along with other CIJE staff, can help us do so.

We are expecting to have between twenty and thirty teachers or staff participating, both Jewish and non-Jewish, Hebrew/Judaica and general studies alike. Our primary goals include enhancing the staff's connection and commitment to the school's specifically Jewish mission, building rapport among our diverse staff, working on models of integration between general and Jewish studies, creating the foundation for an integrated unit on Israel throughout the grades, and allowing our staff to experience together the magic and mystery of Israel.

Please let me know how you can help us. I will be happy to follow up on any leads or suggestions that you might provide.

Thank you, in advance, for your assistance.

Chanukah Sameach,

Milwarke, Wiscowski 3217 • 414-964-1499

Rabbi David Brusin Director of Jewish Studies

 $\mathrm{MHW}(\vec{R}(W) \approx \mathrm{HH}(W) \approx \mathrm{HH}(W) \approx \mathrm{HH}(W)$ 

בית הספר היינוידיהודי בניילוויקי

849 NorthSend, Young Rachard

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Fax 414.963-2723

### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

failing Address: 163 Third Avenue #128 \* //

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

# TELEFAX

DATE: 12-23

FROM: SHULAMITH ELSTER FAX #:

Number of pages (including this sheet) \_\_\_\_\_

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2 mentos: - Legenite U.set & Distussion - The Local Commissions

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 • New York, NY 10003 Phone: (212) 532-1961 • FAX: (212) 213-4078

### MEMORANDUM

TO:	Annette Hochstein	DATE:	December 22, 1992
	cc: Art Rotman Barry Holtz		
FROM:	Shulamith Elster	SUBJECT:	Community Visits for Discussion

Who needs to be briefed in the Lead Communities on the "Lead Community concept" and on the Best Practices Project? What is the best approach to introducing/reinforcing these basic CIJE initiatives?

### I. BACKGROUND:

Each of the communities is "familiar" with the work of the CIJE through the following activities to date: the original proposal process, site visits, community public relations limited mainly to announcement of selection.

Community leadership - through the local federation -- has been apprised through announcements and communications at meetings and in materials prepared for these meetings. Copies of the Guidelines and <u>A Time to Act</u> have been widely circulated in the three communities.

The introduction of the field researchers has been limited to a small group of staff and leadership in Atlanta and Baltimore with the widest exposure in Milwaukee, where Roberta has already addressed two groups. The introduction of the program to educators has been limited also to Milwaukee where Shulamith briefed the Principals Council. In Baltimore there was a presentation by Shulamith to the Board of Directors of the Bureau of Jewish Education.

Community Visits for Discussion Page 2 12/22/92

### II. NEXT STEPS;

### A. Target Populations:

Federation leadership/Board and Executive Local Commission/Group and Steering Committee Principals Council/or Lead Educator Group Boards of educational institutions (supplementary schools, day school, centers) Staffs of educational institutions Congregational schools, day schools, centers) Rabbinic groups Parent groups Community-at-large

### **B. TIMETABLE:**

The timetable for the specific activities is dependent in part on the local work plan - for example, Art's visit to Milwaukee will not take place until (at the earliest.) February 16th, and so no presentations will take place there before that date.

<u>January</u> - Scheduling of Barry's visits through planners in Atlanta, Baltimore and Milwaukee

<u>February</u>: Presentations to lay leadership and local commissions, rabbinic groups, lead educators

March-April: Presentations with local chairs to Boards of educational institutions and synagogues

<u>April-May</u>: Presentations to community groups and teacher/educator groups as perplanning with local commissions

June: Community Events - Speakers

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128 • No Phone: (212) 532-1961

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

### MEMORANDUM

TO: Annette Hochstein

DATE:

December 22, 1992

cc: Art Rotman Barry Holtz

FROM: Shulamith Elster

SUBJECT: <u>The Local Commissions</u>: For discussion

I. "The most respected rabbis, educators, professionals, scholars and lay leaders will serve on community-wide steering committees to guide the project in a specific community. All sectors of the community - congregations, schools, community centers and federations - will need to be involved. Recruiting top community leaders to the cause of Jewish education and involving all sectors of the community will help raise Jewish education to the top of the communal agenda."

(Program Guidelines)

Original Task Statement:

"To be responsible for generating plans and ideas and designing programs that have the support of a coalition of the stakeholders."

### Expanded Task Statement:

"To be responsible for generating plans and ideas and designing programs that have the support of a coalition of the stakeholders."

These emerge from the Lead Community 'concept' and will focus on the development of pilot projects within Enabling Options of personnel, community mobilization and Israel programs with maximum use of Best Practices identified by the CIJE.

The Local Commissions

### Page 2

### II. Essential Elements:

- recruitment of <u>local champion(s)</u> to lead the process and to use his/her influence to recruit others.
- establishment of a <u>steering committee</u> to guide the work of the commission. Composition of steering group is critical so as to include key individuals and institutions.
- c. secure appropriate full-time professional support for the project.
- development of a vision for Jewish education in the community in partnership with professionals.
- e. development of appropriate working agenda for the work of the group for the "translation" of the vision into a plan..
  - map of entire educational system --
    - educator survey (numbers, qualifications, positions, training needs)
    - institutional profiles with emphasis on resources, strengths and weaknesses
  - initial one-year and then five-year plans.
  - formal approach for community support including:
    - 1. ongoing public discussion
    - public relations on behalf of Jewish education in general, Lead Communities, Best Practices, pilot projects
    - 3. <u>new</u> levels of advocacy
    - 4. new financial commitments to increase local funding for Jewish education
  - focus on <u>content</u> and application in pilot projects in specific settings: educational programs within the <u>Enabling Options</u> personnel, community support and mobilization and Israel programs.
  - introduction and maximum use of Best Practices and integration with pilot projects in personnel and community leadership.

Page I

## COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

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

# TELEFAX

DATE: 12-23

FROM:

SHULAMITH ELSTER

FAX #:

Number of pages (including this sheet) \_\_\_\_\_

TO: Ascrette HECROTEIN

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- The Local Commissions

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Community Visits for Discussion Page 2 12/22/92

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Page 4

COUNCIL FOR INITIATIVES IN JEWISH EDUCATIONMailing address:163 Third Avenue #128Phone:(212) 532-1961FAX:(212) 213-4078

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The Local Commissions

Page 2

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The Local Commissions

Page 3

### III. Structure and Membership: The Cleveland Experience

The Cleveland Commission was organized in 1984 with 73 members. The composition of the Joint Commission reflected the <u>unique</u> partnership of federation and congregations, and included endowment funds, BJE, JCC, and a broad representation of lay professional leaders from community agencies including rabbis and professional Jewish educators.

In the initial year, the focus was <u>planning</u> and finding out what was known about Jewish education in the community. A paper by Barry Shrage set the framework for the work of the Commission which eventually focused on four specific areas.

- 1. Personnel
- 2. Parent and family education
- 3. "Beyond the Classroom" educational experiences for pre-adolescents and adolescents (informal education)
- 4. Blue Sky Task Force

Four task forces were convened and these groups met for two years.

<u>FYI</u>: Ukeles Associates is now involved in a project to assess what has been the impact of individual programs and the collective effort and to devise a formal framework for ongoing evaluation.

Note: Materials on the Cleveland Commission were air mailed 12/21/92.

IV. <u>Checklist for commission membership:</u>

Decision Makers;

- Communal leaders
- Educator leaders
- Rabbinic leaders
- Academics
- Clients (e.g., Parents)
- Local funders foundations, endowment funds

Consider Representation from:

- Denominations
- Educational institutions formal and informal (schools, JCC's, campus)
- Other local Jewish organizations
- Local agencies with educational programs

Attachments: Mission Statement-Cleveland 1991 Progress Report

### MISSION STATEMENT

### COMMISSION ON JEWISH CONTINUITY

#### COMMISSION CHARGE:

Cleveland's Jewish community and Jews throughout the Diaspora are faced with a number of challenges and opportunities in their efforts to maintain, strengthen, and transmit Jewish values and traditions to future generations of Jews.

The Commission on Jewish Continuity was created to bring together a group of involved lay and professional leadership to strengthen Jewish continuity and identity in our community.

The Commission's primary goals include:

- 1. To raise the level of consciousness, promote a community dialogue and serve as an advocate for programs that promote Jewish continuity.
- 2. To enlarge the pool of community leadership who are concerned with and act upon the challenges and opportunities before us.
- To create a forum through which members of the Commission can educate themselves on the concepts and issues relating to Jewish continuity.
- To create a forum through which committee members can bring their own thoughts, ideas, and vision to bear on existing programs and on the development of improved structures and programs.
- 5. To create an atmosphere conducive to the implementation of a sound program, including formal/informal Jewish educational strategy (including both parent/family and child components), that uses an interdisciplinary, interagency approach and makes the best possible use of communal resources and expertise.
- 6. To encourage and promote model interdisciplinary and interagency structures for delivery of Jewish educational and identity enhancing services.
- To help identify the financial resources for the implementation of these models.

The Commission will carry out these responsibilities by working closely with and through the leadership of the primary service delivery systems -- the Congregations, the Bureau of Jewish Education, the Jewish Community Center, and all other institutions and groups involved in strengthening Jewish continuity.

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Joint Federation/Congregational Plenum Commission on Jewish Continuity February 18, 1991

PROGRESS REPORT OF THE COMMISSION ON JEWISH CONTINUITY (COJC) EXECUTIVE SUMMARY

The Joint Federation/Congregational Plenem Commission on Jewish Continuity was created to bring together a group of involved lay and professional leadership to strengthen Jewish continuity and identity in our community. The Commission worked with Jewish agencies, schools and synagogues to develop and implement a package of ten programs. This progress report reviews the implementation of these ten programs and highlights questions, issues and challenges arising from their implementation.

The Program Subcommittee of the Continuity Commission is charged with overseeing the implementation of these various projects; facilitating interagency and congregation-agency cooperation; and reviewing other new programs as they are developed in relation to the work of the Commission. The Program Subcommittee is divided into four program review panels, each charged with the review of specific Commission programs.

Now in the second year of program implementation, the Commission is beginning to see the impact of its programs on the students, teachers, families, agencies, schools, and synagogues involved. This progress report conveys a great deal of information about these programs: number of users; effect on participants and institutions; issues for further exploration. What it does not convey are those things harder to quantify and describe in a written report:

- The reaction of a child to his or her first Shabbat experience;
- The response of a teacher to an improved salary and new opportunities for professional development;
- The meaning of a first Israel trip to a teenager using the Israel Incentive Savings Plan;
- The spirit of cooperation, optimism, and excitement fostered by our community's commitment to the continuity of our people.

The Commission will be seeking ways to measure the more intangible impact of its work over the next few months. Nevertheless, much is known about what is happening with the implementation of each of the different programs. The following are the conclusions which the Commission draws from the wealth of information in the progress report.

> Programs have been implemented in a way that is consistent with the goals and objectives outlined in the COJC report. An ongoing governance process ensures community review of program implementation and continued planning around issues arising in the implemen-

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EXECUTIVE SUMMARY	Progress Report of the	February 18, 1991
Commission on Jewish	Continuity	Page 2

tation process. The Commission and its Program Committee have been reconstituted to include representatives from the Federation, Plenum, and implementing agencies. The Commission programs are subject to the full Federation budget review process, and the Federation thoroughly monitors the expenditure of funds.

- Program implementation has been greatly aided by positive and cooperative relationships among and between the various agencies, schools, and synagogues involved. This has occurred on both professional and lay levels.
- The various programs are interrelated and complementary in nature. They support, enhance and blend with each other and with existing educational programs. For example, the Retreat Institute and Project Curriculum Renewal program staffs have worked to coordinate how informal education programs can be integrated into school curriculum, and have jointly sponsored a full-day seminar for teachers on nature as an educational tool and setting. As the Cleveland Fellows Program evolves, it will be another significant example of this, as faculty and students from the program will lend their expertise to many of the other programs.
- Implementation of specific programs has served as a catalyst for change at various institutions. The attention the community has focused on personnel issues has stimulated internal examination and action among synagogues, schools and agencies, consistent with the Commission's goals, and occasionally extending beyond the scope of the Commission's recommendations.
- Related to the previous point, implementation has surfaced new or newly recognized challenges and rising expectations. For example, the salary increases for day school teachers were intended to narrow the gap between our communal schools and other local schools. Teachers, in response to the movement thus far, are now focusing on closing the gap more quickly. These kinds of developments will have future planning implications.
- There is a need to continue to develop support from various constituencies--within the Federation, congregations, and the community as a whole. Funding the program at the increased levels called for will be a major challenge over the next two years and beyond. In addition, the agencies involved in implementation have all raised questions about the security of funding after the initial four years. The Commission has to develop advocates who will understand and maintain the priority of this initiative.
- As a result of the Commission process, the community has been able to attract some exceptionally talented Jewish education professionals to key positions. This is true both for positions

EXECUTIVE SUMMARY	Progress Report of the	February 18, 1991
Commission on Jewish	Continuity	Page 3

created through the Commission's programs, and for other positions in schools and congregations which have been filled in recent years. As the community has created an environment of serious commitment to and support for Jewish education, it has found professional educators prepared to make a serious commitment to the community.

 In the congregations, where 80% of those who receive a Jewisn education are reached, the Commission's programs have started to have a significant impact. Nevertheless there are barriers to overcome, as many synagogue lay and professional leaders are still unaware of the scope and purposes of the COJC initiatives. More effort must be given by the Commission to ensure that congregations understand and use the available resources.

The initial assessment is that the programs of the Continuity Commission are on the right track. There has been a positive response to them by service providers, program participants, lay leadership and the community as a whole. A cooperative and positive environment has surfaced through the project. In implementing such a wide range of programs, it is natural for new challenges and issues to arise. In particular, the Commission must ensure that the new resources out in place are understood and utilized by the various educationa' institutions in the community. As the Commission moves into its third year of implementation, it will continue to respond to these challenges, monitor and evaluate the programs, and plan for what lies anead.

COMMISSION ON JEWISH CONTINUITY

Nathan Oscar and Charles Rather, Co-Chairmen

PROGRAM COMMITTEE, CO-CHAIRMEN

Zachary Paris and Stanley Wertheim

PROGRAM PANEL CHAIRMAN

Alec Berezin Irvin A. Leonard Dr. Arthur Naparstek Robert Solomon

/jaoDSB/36:cojc

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

Honorary Chair Max M. Fisher

Chair Morron L. Manae

Vice Choirs Charles H. Goodman Net Greenbaum Matthew J. Maryles Lester Poliack

Executive Director Arthur Rotman

=

Chief Education Officer Dr. Shulamith R. Elster December 21, 1992

To: Annette Hochstein

From: Shulamith Elster

Re: LOCAL COMMISSIONS

FYI...



# The Jewish Community Federation of Cleveland

1750 EUCLID AVENUE - CLEVELAND, OHIO 44112 - PF (2011)214-146, 500 -- FAX # (216) 8611270

December 1988

LETTER OF TRANSMITTAL

Rabbi Daniel J. Silver, Chairman Congregational Plenum c/o The Temple Branch 26000 Shaker Boulevard Cleveland, OH 44122 Hon. Milton A. Wolf, President Jewish Community Federation 1750 Euclid Avenue Cleveland, OH 44115

Dear Rabbi Silver and Milt,

It is with great honor and pride that we are able to submit to you the report of the Joint Federation/Plenum Commission on Jewish Continuity. The report culminates three years of intensive work. Its recommendations are the most comprehensive attempt by a North American Jewish community to confront the challenges of ensuring Jewish continuity. The report also represents a significant evolution in the partnership between the Federation and the synagogues, a partnership which strengthens Jewish communal life in Cleveland to a very great extent.

In the late 1980's we are 40 years from the transforming events of Jewish life in the twentieth century -- the Holocaust and the rebirth of the State of Israel. And these events, for our children and grandchildren, do not and cannot evoke the same powerful emotions of horror, wonder and awe as they do for those who experienced those historic times. For many, the Holocaust is already as distant as the exodus from Egypt, and Israel is one of over 150 nations in the United Nations, two-thirds of which have been created since 1948. We can no longer count on these transforming events to ensure Jewish continuity.

As we wrestle with this challenge, we are reminded of the situation facing Moses as nis life drew to a close. He knew that he had to establisn structures to support continuity as the Jewish people became more distant from the exodus from Egypt and the revelation at Sinai. That is why, on his last day, he involved his community in a commemorative event using orama, song, poetry, and teaching. His closing exhortation was "Take to heart all the words with which I have warned you this day. Enjoin them upon your children, that they may observe faithfully all the terms of this Torah. For it is not a trifling thing for you: It is your very life; through it you shall long endure..."

So our challenge today, similar to that faced by Moses, is to bring to life for a new generation the lessons and inspirations of our past and a fervent hope for our future. The challenge is not an easy one.

PRISIGENT \* MAX R. FRIEdmax \* Vict-Presidents \* Robert Silverner \* Month Write \* Sales P. Wrethers TREASOND \* Alvis L. GRON \* Associant TREASOND \* Robert Goldberg \* Laternic, Vice-Presson \* \* Stepher R. Hollwer Rabbi Daniel J. Silver Hon. Milton A. Wolf December 1988 Page 2

Our children and grandchildren do not have many of the reinforcements that supported the building of our own Jewish identities -- neighborhoods with the sights, sounds, and smells of an enriched Jewish lifestyle; an older generation with first-hand memories of European Jewish culture before the Holocaust; family members who may have experienced the suffering of the Holocaust, or the thrill of the creation of the State of Israel. The Jewish community turned to Jewish schools to inculcate in its children what was traditionally absorbed simply by living in a Jewish household in a Jewish neighborhood. After several decades of unrealistic expectations of our schools, we now know that this approach alone cannot work. Children will not integrate lessons into their lives that are not reinforced at home. They must experience, as well as study, what it means to live a Jewish life.

Our approach to Jewish education must change. Of course, we must bolster formal classroom learning. However, in order to survive as a people, the focus of Jewish education needs to shift from the child to the family, because our families must learn to make a Jewish home and raise a Jewish child. This challenge is all the more complex because so many singles, childless couples, and single parents have replaced traditional family units.

We must recognize that traditional supplementary Jewish school education can no longer approach the unrealistic expectations of the past. Our community must refocus its efforts on strengthening the ability of each school and congregation to integrate parent and family education into the experience of each family that enters its oporway. We must integrate proven "beyond the classroom" education programs into each child's Jewish education experience. We must enhance the ability of our day schools to provide intensive Jewish educational experiences. And we must do these things now, before we raise a generation that knows neither Israel, the <u>Shabbat</u>, nor any compelling reason to be Jewish.

We had tremendous help in our task from dedicated volunteer and professional community leaders throughout the community. We must also recognize the valuable contributions of our Federation staff, Joel Fox and Mark Gurvis, who supported and guided this planning process. Their perseverance through three years of complex planning has resulted in an important opportunity for the community. The programs outlined in this report can have a transforming effect on the entire Jewish education system throughout Cleveland, and over time should touch virtually every family in our community.

Sincerely,

uch tata James m. Reich

Charles Ratner & James Reich, Co-Chairmen Joint Federation/Plenum Commission on Jewish Continuity

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## REPORT OF THE JOINT FEDERATION/PLENUM COMMISSION ON JEWISH CONTINUITY

#### 1. INTRODUCTION

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Assimilation, intermarriage, identity, affiliation, commitment -- these are code words that have dominated communal discussions for many years. They have become the measures by which we determine the viability of our community -- prospects of our survival.

For so many centuries, and even to this day, physical survival has necessarily been uppermost in our minds. But at this time and in this place, we can move beyond that. It is not that antisemitism has vanished, or that Jews are no longer on the move from troubled lands, or even that Israel's safety is no longer challenged. We must be ever vigilant for ourselves and for Jews wherever they may be in trouble. But the fact is that we have the ability now -and the need -- to focus on spiritual survival as well as physical survival. Now that we are free to be Jews, how can we be sure that we will remain Jews, and what kind of Jews will we be?

#### The Environment

As we struggle with this challenge, we encounter forces acting on our community in diverse ways -- some positive, others negative. Our Cleveland Jewish community remains concentrated. Even as Jews move eastward, over 80 percent still live in several contiguous suburbs. Although the vast majority intend to affiliate with the community and raise children as Jews, our recent demographic study shows increasing numbers of intermarried couples, many of whom will not raise their children as Jews. In fact, since the 1980 study was conducted, the overall incidence of intermarriage without conversion in our community has increased from 11.1 percent to 17.3 percent. Even more disturbing is the 33 percent incidence of intermarried families are geographically cispersed at the fringes of the Jewish community, so the image of a strong center with graoually fraying edges may not be inaccurate.

The study shows that 78 percent of our children will have some Jewish educational experience, and that more families are choosing day school education. Unfortunately, the 1983 study of 18 to 29 year-olds in our community revealed great dissatisfaction with Jewish educational experiences. We must be concerned about the quality of education received by many children in the supplementary schools, and certainly about those children who will receive no formal Jewish education. Also of note is the length of time children remain in education programs. Although 90 percent of children of Orthodox families continue their Jewish education past age 14, fewer than half of non-Orthodox children do so.

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Of critical concern in education is our community's personnel situation. Among the 15 congregational schools, there are only three professional educators working as full-time school directors. In all three cases, these professionals receive inadequate compensation.

Of even greater concern is the number of schools where educational directors work fewer than 10 hours a week. In that time, a director is expected to run the basic school program, supervise staff, organize curriculum, and maintain contacts with parents. Insufficient for those tasks, the limited time also precludes any possibility of planning and implementing new programs for family education, parent education, and retreat programs, or taking advantage of communal supports such as the Jewisn Educator Services Program or the Israel Incentive Savings Plan. Witnout strong and visionary leadership among the directors of our schools, our community cannot hope to put in place exciting, vibrant educational programs that will capture the hearts and minds of our families.

The congregational schools rely heavily on avocational teachers, dedicated community members who teach between three and eight hours a week in one or more school settings. The 20 percent turnover each year among these positions reflects the many teachers who move from school to school, searching for the support they need to be able to succeed in the classroom. The turnover also reflects the number of people who each year give up out of frustration. Our communal day schools are unable to offer professional salaries that would enable them to attract and retain the high quality faculty they need. Each August day and supplementary school directors are engaged in a scrample to complete their faculties, and each year it is becoming more difficult.

We do not have a comprehensive Jewish education profession. There are no commonly accepted standards for professional education for either teachers or administrators; there are no appropriate standards for professional compensation, including benefits and persions; and there are no career ladders. Cleveland is not alone in facing this problem. This is the plight of Jewish education in every community in this country, and in many other Diaspora communities around the world.

## Building on Strengths

But, our community also has some important strengths to draw upon: very high rates of synagogue affiliation and school enrollments; stronger teacher education programs developed through both the College of Jewish Studies and the Bureau of Jewish Education; a new Jewish Community Center facility that includes a conference center for school and youth group retreats; and a more productive Federation-synagogue partnership, manifested in the Congregational Enrichment Fund, Israel Incentive Savings Flan, and Community Youth Resource Office.

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Paradoxically, a growing disquiet among us may ultimately demonstrate a positive side. Intermarriage has touched many families in the community. Our children, dissatisfied with their own Jewish education, want better for their own children. Increasingly, people fear that Jewish identity and commitment are slipping away from us. More and more, the community is focusing on Jewish education to ensure a bright Jewish future. This has created in our community the most critical element necessary for addressing Jewish continuity issues -- a climate for change!

## II. A CLIMATE FOR CHANGE

# Initiating Change

In 1979, the Israeli government and the Board of Governors of the Jewish Agency for Israel created the Joint Program for Jewish Education. It was initiated because Jewish leadership perceived significant, long-term, negative trends in Jewish identity in the Diaspora. Because Israel's destiny is so clearly connected to that of the Diaspora, Israeli and other world Jewish leaders perceived this as a threat to Israel as well.

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## Local Organization

In 1985, Cleveland's Jewish community began to develop its own local process, closely linked to the goals and directions that guided international and national efforts through the Jewish Agency, the Council of Jewish Federations, and the Jewish Education Service of North America. Our goals were to organize communal priorities for Jewish continuity, coordinate resonness to those priorities, and foster an environment in which agencies might develop interagency and interdisciplinary approaches to Jewish continuity (See Appendix I -- Mission Statement for the Commission on Jewish Continuity).

Jewish education studies in 1976 (Albert Ratner, chairman, and Bennett Yanowitz, associate chairman) and 1981 (Nathan Oscar, chairman) laid important groundwork in the Cleveland Jewish community. The recommendations of these studies led to new communal efforts in teacher training and fostered efforts by schools to develop family education and "peyond the classroom" educational programs. The establishment of the Congregational Enrichment Fund marked a new era in synagogue/Federation relations and presaged a partnership. The revitalization of the Cleveland College of Jewish Studies in

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the mid-1980's ensured a valuable resource that stimulated the Jewish educational field with new visions and exciting, dynamic faculty. These developments formed an important base upon which new efforts could build.

The Commission on Jewish Continuity was conceived as a broadly representative body composed of key communal leadership. Critically important was attracting leadership not traditionally involved with Jewish continuity and Jewish education issues. The commission began its work with a period of selfeducation, drawing upon leading Jewish thinkers, locally and from around the country, in order to ensure an informed communal perspective on priorities.

## A Unique Partnership

At this stage the Federation made a significant departure from its standard planning process. Recognizing that an effort of this scope required the active participation of the congregations, the Federation approached the Congregational Plenum as a full partner to co-sponsor a newly constituted Joint Federation/Plenum Commission on Jewish Continuity.

The joint commission represents a new stage in the evolving relationship between the Federation and the synagogues. The past few years have seen a very productive and fulfilling working relationship through which the community has been able to work in a stronger, more united way on various community concerns, including chaplaincy services, preservation of cemeteries, and strengthening youth activities.

The implementation of the recommendations that follow will build even stronger ties between the synagogues and the Federation and communal agencies. They will enable congregations to share more fully in the community's resources, and will ensure that the community can move forward together to meet the exciting challenges and opportunities of ensuring our communal viability in the 21st century.

# III. ESTABLISHING PRIORITIES

Through the exploratory study process, three broad areas emerged as clear priorities: personnel, parent and family education, and "beyond the classroom" education. Commission members believed it was important to narrow the field of study to specific areas in which the community could have the greatest possible impact.

Personnel encompassed the recruitment, training, and retention of staff needed to maintain Jewish continuity activities, as well as enabling the community to respond to emerging personnel needs for new program areas.

Parent and family education was recognized as a critical element in enhancing the effectiveness of educational experiences for children and adults. The emphasis was on efforts to increase parents' ability to serve as Jewish role

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models and as partners with schools in the Jewish education of their children.

Finally, "beyond the classroom" education grouped a range of issues around reaching pre-adolescent and adolescent youth in more effective ways, and integrating a variety of informal educational programs and environments into the educational experience of each child.

Each of these priority areas became the focus of a task force charged with developing program responses for its area of concern.

A fourth task force was created as an opportunity for community leaders to pursue a more open agenda and to develop new ideas related to Jewish continuity. Some sought an opportunity to address structural issues related to Jewish education agencies. Others wanted an opportunity to think creatively about what Jewish education programs ought to be. The Blue Sky Task Force was developed, therefore, as a mechanism to accommodate the interests of communal leadership in developing further new priority areas for the community to address.

The task force process enabled a broad range of lay leaders and professionals to engage in serious planning. Each task force met extensively and produced exciting new programs that will dramatically improve the community's ability to address Jewish continuity concerns. Leadership and membership of each task force were designated by the Federation and the Congregational Plenum, but the partnership at the task force level transcended parochial interests to respond in a unified way to communal priorities.

What has evolved is a highly comprehensive and integrated program that will build on the past successes of the community and carry us forward significantly. The programs outlined in the attached reports represent the most comprehensive attempt by a North American Jewish community to address Jewish continuity and Jewish education issues. In effect, Cleveland will become a laboratory for Jewish continuity efforts, and again lead the way in the national and international arena in responding to a critical communa: concern.

#### IV. GUIDING PRINCIPLES AND OPERATING ASSUMPTIONS

Several principles and operating assumptions about Jewish education guided the task forces in their work. These were drawn from experience in the Jewish education field, particularly with parent and family and "beyond the classroom" educational programs. The assumptions were also based on the testimony and consultation of many Jewish educators in Cleveland and around the country. The assumptions can be summarized as follows:

 Jewish education is a staff-intensive activity, and its success is dependent on the quality of its personnel. The community must invest significantly to build a Jewish education profession. Critical to the

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Malling Address 163 Thira Avenue =128, New York, NY 10003 Phone: (212) 532-1961 • Fax. (212) 213-4078

Honorary Chair Max M. Fisher

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Chair Morton L. Manael

Vice Chairs Charles H. Goodmon Iveil Greenbaum Matthew J. Maryles Lester Pollack

Executive Director Arthur Rotmon

Chief Education Officer Dr. Shulamith R. Elster December 21, 1992

To: Annette Hochstein

From: Shulamith Elster

Re: LOCAL COMMISSIONS

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THE JEWISE COMMUNITY FEE REPORT OF CLEVELAND TREELED ANTAL CLEVELAND OHIO 4412-PER CLEVELAND MACHINE HAND DAY BEAT 230

December 1988

LETTER OF TRANSMITTAL

Rabbi Daniel J. Silver, Chairman Congregational Plenum c/o The Temple Branch 26000 Shaker Boulevard Cleveland, OH 44122 Hon. Milton A. Wolf, President Jewish Community Federation 1750 Euclid Avenue Cleveland, OH 44115

Dear Rabbi Silver and Milt,

It is with great honor and bride that we are able to submit to you the report of the Joint Federation/Plenum Commission on Jewish Continuity. The report culminates three years of intensive work. Its recommendations are the most comprehensive attempt by a North American Jewish community to confront the challenges of ensuring Jewish continuity. The report also represents a significant evolution in the partnership between the Federation and the synagogues, a partnership which strengthens Jewish communal life in Cleveland to a very great extent.

In the late 1980's we are 40 years from the transforming events of Jewish hife in the twentieth century -- the Holocaust and the rebirth of the State of Israel. And these events, for our children and granochildren, do not and cannot evoke the same powerful emotions of horror, wonder and awe as they do for those who experienced those historic times. For many, the Holocaust is already as distant as the exodus from Egypt, and Israel is one of over 150 nations in the United Nations, two-thirds of which have been created since 1948. We can no longer count on these transforming events to ensure Jewish continuity.

As we wrestle with this challenge, we are reminded of the situation facing Moses as his life drew to a close. He knew that he had to establish structures to support continuity as the Jewish beople became more distant from the exodus from Equat and the revelation at Sinai. That is why, on his last day, he involved his community in a commemorative event using drama, song, poetry, and teaching. His closing exhortation was "Take to heart all the words with which I have warned you this day. Enjoin them upon your children, that they may observe faithfully all the terms of this Torah. For it is not a trifling thing for you: It is your very life; through it you shall long endure..."

So our challenge today, similar to that faced by Moses, is to bring to life for a new generation the lessons and inspirations of our past and a fervent hope for our future. The challenge is not an easy one. Rabbi Daniel J. Silver Hon. Milton A. Wolf December 1988 Page 2

. Our children and grandchildren do not have many of the reinforcements that supported the building of our own Jewish identities -- neighborhoods with the sights, sounds, and smells of an enriched Jewish lifestyle; an older generation with first-hand memories of European Jewish culture before the Holocaust; family members who may have experienced the suffering of the Holocaust, or the thrill of the creation of the State of Israel. The Jewish community turned to Jewish schools to inculcate in its children what was traditionally absorbed simply by living in a Jewish household in a Jewish neighborhood. After several decades of unrealistic expectations of our schools, we now know that this approach alone cannot work. Children will not integrate lessons into their lives that are not reinforced at home. They must experience, as well as study, what it means to live a Jewish life.

Our approach to Jewish education must change. Of course, we must bolster formal classroom learning. However, in order to survive as a people, the focus of Jewish education needs to shift from the child to the family, because our families must learn to make a Jewish home and raise a Jewish child. This challenge is all the more complex because so many singles, childless couples, and single parents have replaced traditional family units.

We must recognize that traditional supplementary Jewish school education can no longer approach the unrealistic expectations of the past. Our community must refocus its efforts on strengthening the ability of each school and congregation to integrate parent and family education into the experience of each family that enters its doorway. We must integrate proven "beyond the classroom" education programs into each child's Jewish education experience. We must enhance the ability of our day schools to provide intensive Jewish educational experiences. And we must do these things now, before we raise a generation that knows neither Israel, the <u>Shabbat</u>, nor any compelling reason to be Jewish.

We had tremendous help in our task from dedicated volunteer and professional community leaders throughout the community. We must also recognize the valuable contributions of our Federation staff, Joel Fox and Mark Gurvis, who supported and guided this planning process. Their perseverance through three years of complex planning has resulted in an important opportunity for the community. The programs outlined in this report can have a transforming effect on the entire Jewish education system throughout Cleveland, and over time should touch virtually every family in our community.

Sincerely,

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Charles Ratner & James Reich, Co-Chairmen Joint Federation/Plenum Commission on Jewish Continuity

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## Jewish Community Federation of Cleveland

December 1988

# REPORT OF THE JOINT FEDERATION/PLENUM COMMISSION ON JEWISH CONTINUITY

## I. INTRODUCTION

Assimilation, intermarriage, identity, affiliation, commitment -- these are code words that have dominated communal discussions for many years. They have become the measures by which we determine the viability of our community -- prospects of our survival.

For so many centuries, and even to this day, physical survival has necessarily been uppermost in our minds. But at this time and in this place, we can move beyond that. It is not that antisemitism has vanished, or that Jews are no longer on the move from troubled lands, or even that Israel's safety is no longer challenged. We must be ever vigilant for ourselves and for Jews wherever they may be in trouble. But the fact is that we have the ability now -and the need -- to focus on spiritual survival as well as physical survival. Now that we are free to be Jews, how can we be sure that we will remain Jews, and what kind of Jews will we be?

#### The Environment

As we struggle with this challenge, we encounter forces acting on our community in diverse ways -- some positive, others negative. Our Cleveland Jewish community remains concentrated. Even as Jews move eastward, over 80 percent still live in several contiguous suburbs. Although the vast majority intend to affiliate with the community and raise children as Jews, our recent demographic study shows increasing numbers of intermarried couples, many of whom will not raise their children as Jews. In fact, since the 1980 study was conducted, the overall incidence of intermarriage without conversion in our community has increased from 11.1 percent to 17.3 percent. Even more disturbing is the 33 percent incidence of intermarriage without conversion among our children under age 40. Many of the intermarried families are geographically dispersed at the fringes of the Jewish community, so the image of a strong center with gradually fraying edges may not be inaccurate.

The study shows that 78 percent of our children will have some Jewish educational experience, and that more families are choosing day school education. Unfortunately, the 1983 study of 18 to 29 year-olds in our community revealed great dissatisfaction with Jewish educational experiences. We must be concerned about the quality of education received by many children in the supplementary schools, and certainly about those children who will receive no formal Jewish education. Also of note is the length of time children remain in education programs. Although 90 percent of children of Orthodox families continue their Jewish education past age 14, fewer than half of non-Orthodox children do so.

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Of critical concern in education is our community's personnel situation. Among the 15 congregational schools, there are only three professional educators working as full-time school directors. In all three cases, these professionals receive inadequate compensation.

Of even greater concern is the number of schools where educational directors work fewer than 10 hours a week. In that time, a director is expected to run the basic school program, supervise staff, organize curriculum, and maintain contacts with parents. Insufficient for those tasks, the limited time also precludes any possibility of planning and implementing new programs for family education, parent education, and retreat programs, or taking advantage of communal supports such as the Jewish Educator Services Program or the Israel Incentive Savings Plan. Without strong and visionary leadership among the directors of our schools, our community cannot hope to put in place exciting, vibrant educational programs that will capture the hearts and minds of our families.

The congregational schools rely neavily on avocational teachers, dedicated community members who teach between three and eight hours a week in one or more school settings. The 20 percent turnover each year among these positions reflects the many teachers who move from school to school, searching for the support they need to be able to succeed in the classroom. The turnover also reflects the number of beople who each year give up out of frustration. Our communal day schools are unable to offer professional selaries that would enable them to attract and retain the high quality faculty they need. Each August day and supplementary school directors are engaged in a scramble to complete their faculties, and each year it is becoming more difficult.

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But, our community also has some important strengths to draw upon: very high rates of synagogue affiliation and school enrollments; stronger teacher education programs developed through both the College of Jewish Studies and the Bureau of Jewish Education; a new Jewish Community Center facility that includes a conference center for school and youth group retreats; and a more productive Federation-synagogue partnership, manifested in the Congregational Enrichment Fund, Israel Incentive Savings Flan, and Community Youth Resource Office.

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December 1983 Page 4

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The implementation of the recommendations that follow will build even stronger ties between the synagogues and the Federation and communal agencies. They will enable congregations to share more fully in the community's resources, and will ensure that the community can move forward together to meet the exciting challenges and opportunities of ensuring our communal viability in the 21st century.

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Through the exploratory study process, three broad areas emerged as clear priorities: personnel, parent and family education, and "beyond the classroom" education. Commission members believed it was important to narrow the field of study to specific areas in which the community could have the greatest possible impact.

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The task force process enabled a broad range of lay leaders and professionals to engage in serious planning. Each task force met extensively and produced exciting new programs that will gramatically improve the community's ability to address Jewish continuity concerns. Leadership and membership of each task force were designated by the Federation and the Congregational Plenum, but the partnership at the task force level transcended parochial interests to respond in a unified way to communal priorities.

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#### IV. GUIDING PPINCIPLES AND OPERATING ASSUMPTIONS

Several principles and operating assumptions about Jewish education guided the task forces in their work. These were drawn from experience in the Jewish education field, particularly with parent and family and "beyond the classroom" educational programs. The assumptions were also based on the testimony and consultation of many Jewish educators in Cleveland and around the country. The assumptions can be summarized as follows:

1. Jewish education is a staff-intensive activity, and its success is dependent on the quality of its personnel. The community must invest significantly to build a Jewish education profession. Critical to the

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success of such efforts is ensuring visionary and dynamic educational leadership.

- 2. Each child should have opportunities for educational experiences that provide a Jewish living environment in order to bring classroom concepts to life. Integrating retreats, Israel trips, summer camps, and other "beyond the classroom" programs into a child's educational experience has a life-long impact on Jewish identity building.
- Jewish schooling for children can succeed only if supported in the home environment. Parents need to be able to represent Jewish values, attitudes, and behaviors to their children. To do this, parents often need more tools and skills than their own childhood Jewish education afforded them.

#### V. MAJOR RECOMMENDATIONS

The above assumptions form the foundation of the task force recommendations. The implications, challenges, and specific approaches are outlined in the individual task force reports (see Appendices II - IV). Even though develobed by three separate task forces, the full range of programs represent an integrated communal approach. The programs link together, support one another, and are best viewed as discrete parts of a whole program to strengthen and refocus Jewish education efforts in our community. The implementation steps required by these recommendations are outlined in Appendix V. Following is a summary of major program recommendations:

- A. <u>Cleveland Fellows</u> -- The College of Jewish Studies will develop a graduate program in Jewish education for students from Cleveland and elsewhere. The faculty and students will be engaged in study, teaching, and program development, within congregations, schools, and agencies. They will raise the level and quality of the local field of Jewish education and lead to positive ramifications beyond Cleveland.
- B. Feilows Graouztes Positions -- The graduates of the Cleveland Fellows program will be hired to fill many of the new positions in new areas mandated by the Commission on Jewish Continuity. The positions will include congregational family educators, retreat specialists, master teachers, school directors, and others.
- C. <u>In-Service Education Package</u> -- The Bureau of Jewish Education and College of Jewish Studies will develop a program of individualized professional growth and in-service education to guide teachers already working throughout the community. The <u>Personal Growth Plan</u> starts with individual teachers at their various levels of experience, knowledge, and commitment, and helps lead them to degrees, licensure, or other advances in professional preparation. In addition, the community will implement teacher and institutional stipends to encourage participation in teacher education programs.

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- D. <u>Communal Day Schools</u> -- Salaries for our day school teachers are cangerously low, inhibiting the schools' ability to attract and retain the high quality faculty they need to compete with other local private schools. Accordingly, the community will implement a four year plan to address these critical salary gaps.
- E. <u>Community Teachers</u> -- The Bureau of Jewish Education will create five full-time Community Teacher positions. Each teacher will work in a variety of school settings, combining jobs for a reasonable fulltime teaching load. This will help recruit qualified personnel to the field and to specific schools, reducing the need for avocational personnel.
- F. <u>Retreat Institute</u> -- This program, to be housed at the JCC, will work with schools, youth groups, and others to develop retreat programs. Retreat institute staff would work with schools before, during, and after retreats to plan, implement, and evaluate programs. In particular, this should foster dramatic growth in family programs. Also, the present cost of using the Treuhaft Conference Center for school and youth group overnight programs will be reduced by half. Beginning with an emphasis on school, family, and youth group programs, the Retreat Institute would develop its resources over time to also support programs for abult groups, leadership groups, and others.
- G. <u>HISP</u> -- The Israel Incentive Savings Plan attracts 100 new enrollments each year. The potential for additional growth is tremendous. The community will now approach recruitment differently, targeting specific congregations and schools to develop school-based trips that go hand-in-hand with HISP enroliment. This should dramatically increase the number of Cleveland youth who will have an Israel experience. Also, the shares of funding by the family, the school, and the community will be increased to reflect the current cost of Israel trips.
- H. Curriculum Renewal -- Many of the community's schools operate with out-dated or ineffective curriculum. Also, new family education, israel studies, and "beyond the classroom" education programs should be integrated into school programs. The Eureau's pilot program, Project Curriculum Renewal, should be expanded to work with each school on this critical concern.
- Community Youth Resource Office -- This program, started last year as a joint initiative of the Congregational Plenum and the Federation, provides valuable communal supports to youth groups for programming, outreach strategies, and advisor training and placement. Depending on a favorable second year evaluation, this program should receive continued community funding.

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J. <u>Congregational Enrichment Fund Expansion</u> -- This fund has enabled the congregations to develop important new programs in recent years in the areas of parent and family education, and "beyond the classroom" education. Funding has decreased since the program was initiated in 1982. An expansion of funds is now recommended to enable congregations to increase programming.

Throughout the task force reports there are additional recommendations which require implementation by agencies and synagogues, or suggest further community planning. These are listed in Appendix VI.

## VI. PROGRAM BUDGETS

The program budgets reflect a four year estimate of the cost of developing and expanding Jewish education supports in accordance with the recommendations outlined above. These budget estimates will undergo further review prior to implementation and be subject to annual review and modification through the monitoring and evaluation work of the Commission on Jewish Continuity. They reflect an extremely ambitious effort by the community to effect significant change in Jewish education. Reflecting the partnership that has supported the commission process, the individual program budgets show both the gross cost of each program, and the net cost in new dollars from the community. Total gross costs are reflected at the bottom of the overall budget.

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- A. <u>Structure</u> -- The following structure is proposed for the newly reconstituted Joint Commission on Jewish Continuity and its subcommittees:
  - 1. Commission
    - a) Oversee program budgets and recommend allocations for the task force recommendations.
    - b) Coordinate evaluation of new programs.
    - c) Conduct advocacy efforts.
  - 2. Program Subcommittee
    - a) Oversee implementation of task force recommendations.
    - b) Facilitate interagency and congregation-agency cooperation.
    - c) Review other new programs as they are developed and undertake new planning studies (with the creation of special task forces if necessary).
  - 3. Professional Advisory Committee
    - a) Act as a resource to advise community planning in Jewish education.
    - b) Survey national and international Jewish education arena.
    - Foster cohesion of professional educators throughout the community.
  - 4. Other subcommittees as necessary.
- B. MEMBERSHIP

The composition of the Joint Commission on Jewish Continuity and its subcommittees should reflect the unique partnership that has been developed within the commission, including representation from the Federation, the Congregational Plenum, and the communal education agencies. Leadership positions should be shared, with one chairperson designated by Federation and the other by the Plenum.

- 1. The Commission should be composed of the following:
  - a) Commission and program subcommittee co-chairpersons.

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- Federation Budget, CSPC, WFPC, and Endowment chairpersons or their designees.
- c) Congregational Plenum -- four designated representatives.
- BJE, CCJS, and JCC president (board chairmen) or designees.
- The program subcommittee should reflect a broader representation of Tay and professional leaders from the Federation, synagogues, agencies, schools, and proader Dewish community.
- The professional advisory committee should be composed of communal agency directors, Federation planning staff, rabbinic leadership, and professional Jewish educators.

# C. STAFFING

Federation will continue to provide staffing through its Community Services Planning Department.

# D. ALLOCATION OF FUNDS

- The Commission on Jewish Continuity will make annual recommendations to the Federation's Budget Committee for allocation of funds to meet its program needs. These will be in addition to regular annual allocations to beneficiary agencies through the Jewish Welfare Fund. The funds will be targeted for implementing new programs, or expanding existing programs, in accordance with COJC recommendations.
- The COUC executive committee would reserve the right to withhold funcs from organizations that fail to meet its implementation or evaluation standards.

## VIII. EVALUATION

Evaluation must be an integral part of the implementation of the programs outlined above. Because of the varied nature of the programs' goals and auspices, an overall evaluation design should make use of a multiple-method approach. Evaluation should serve to measure the extent to which program goals have been met; provide mid-course feedback which can guide improvement of programs along the way; and provide valuable information on the effectiveness of the relationships between the various partners, including Federation's role as initiator and facilitator of the process.

December 1988 Page 18

#### IX. CONCLUSION

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Our commission is confident that the recommendations outlined in this report are the critical steps that our community must take now to ensure Jewish continuity. Without an ambitious, comprehensive, and integrated approach to the challenges that Cleveland and every Jewish community faces, we will continue to find Jewish identity and commitment growing weaker and weaker. With such an approach, we provide the tools that the community, its institutions, and its families need to bring us forward to a bright Jewish future.

Respectfully submitted,

Joint Federation/Plenum Commission on Jewish Continuity

Setn B. Harris

#### Co-Chairmen

Charles Ratner and James Reich

Members

Howard Amster Dr. David Ariel Edward I. Baker Alan D. Bennett Daniel Biskind Sidney Caplan Michael Diamant Jeffrey Doppelt Hiloa Ezigin Louis Feio Rabbi Yaacov Feitman — Earl Linden Bruce B. Felder Alice Freeman Marc Freimuth Jeffrey Friecman Max R. Frieoman Stuart Gertman Robert Goldperg Henry J. Goodman Tamra Gould Alvin L. Gray Harley Gross Rabbi David S. Hachen Stanley Rothenfeld Irwin S. Haiman

Richard Horvitz Rabbi Benjamin A. Kamin Sue R. Seidman David Kangesser David Kleinman N. Herschel Koblenz Earl Leikin Irving A. Leonard Robert Levin Judith Lichtig Milton Maltz Thelma Maltz Morton L. Mandel Sheldon S. Mann Dr. Arthur J. Naparstek Nathan Oscar Zachary T. Paris Leon Plevin Dan A. Polster Robert S. Reitman Alan Rosskamm Peter Rzepka

Signey J. Schwager Mark A. Schwartz Mona Senkfor Rapbi Jacob Shtull Michael Siedal Barton A. Simon Dr. Lawrence J. Singerman Dr. Bernard Steinberg Jack Stewart Irving I. Stone Peggy Wasserstrom Philip Wasserstrom Penni Weinberg Morry Weiss Sally H. Wertheim Stanley Wertheim Hon. Milton A. Wolf Sandra Wuliger Bennett Yanowitz Donna Yanowitz Rabbi David S. Zlatin Henry L. Zucker

# Staff

Joel Fox

Mark Gurvis

221308

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

# TELEFAX

DATE: December 21, 1992

FROM: Shulamith Elster

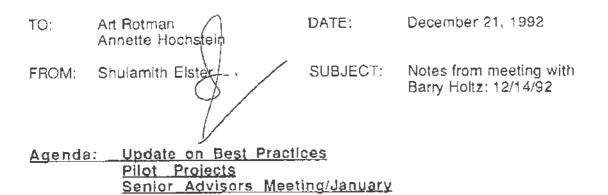
FAX #:

Number of pages (including this sheet) \_\_\_\_\_

TO: ANNETTE HOCHSTEIN

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 • New York, NY 10003 Phone: (212) 532-1961 • FAX: (212) 213-4078

# MEMORANDUM



# I. Best Practices;

A. Barry hopes to produce an 80-85 page report on Best Practices by the end of January. This will be an updated paper, the approach taken by the supplementary school group, executive summary of the reports and the edited reports.

The focus of this work will be educating the community about Best Practices.

- B. Early Childhood reports are underway with a number completed and others to be completed within a relatively short period of time.
- C. Additional work on day schools will wait until January.
- D. SRE will meet with Richard Joel next week regarding Senior Advisors and will talk with him about how CIJE should proceed with the campus division of Best Practices.
- E. Barry introduced the idea of a category called "community-wide initiatives". These would be exemplary special projects carried out by communities. This may be a good "catch-all category" that will cut across other programmatic areas (e.g., Melton funded "Discovery" project in Columbus).
- F. The Cummings grant proposal should be reviewed carefully at this time in light of commitments made to activities funded by the grant. Shulamith will send materials to Barry and put this on the continuing agenda.

Notes from meeting with Barry Holtz: 12/14/92 12/21/92

# II. Pilot Projects

- A. A meeting is scheduled for 12/22 to work on the pilot projects.
- B. Pilot projects will center on the "enabling options" as per discussions during November-December staff meetings.
- C. Pilot projects may make good use of the consultants/educators who participated in the Best Practices work to date.
- D. Importance of the projects to "jump-start" the local efforts.

# III. Senior Advisors Meeting

- A. Suggestions as to how to present Best Practices to this group. Possible reflection by panelist/writer/participants (Carol Ingalt, Joe Reimer) in the process to date.
- B. Shall we share sample reports for the Advisors at the January meeting?
- C. Discussion to be continued at 12/22 meeting and in light of the proposed total agenda that Shulamith will develop later this week.

# IV. Etc.

- A. Barry will visit Milwaukee with Art and also meet with John Colman there in John's capacity as Chairman of the Best Practices Committee of CIJE.
- B. Plans to have Barry visit Baltimore and Atlanta in near future as part of the "launch" and educational effort.

 Mailing address:
 163 Third Avenue #128
 New York, NY 10003

 Phone:
 (212) 532-1961
 FAX:
 (212) 213-4078

# MEMORANDUM

TO: Barry Holtz

DATE: December 18, 1992

cc: Art Rotman

FROM: Shulamith Elster

SUBJECT: Brandeis/Hornstein Program/ Bernie Reisman

As you can see from the date on the attached letter, Bernie Reisman was in touch with me last year following a stay and conversations with Seymour in Israel.

The reason I pulled the letter now is related to our conversations about pilot projects and the possibility that we could use our colleagues at Brandeis in connection with one of our "jump start" projects.

At any rate, let's add this to the growing list of agenda items for next week.

# E. Brancieis

Brancleis University

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March 11, 1992

Dr. Shulamith Elster 5800 Nicholson Lane # 508 Rockville, MD 20852

Dear Shula,

I've just returned from my sabbatical stint in Israel and I've had occasion to read the materials you sent out on the recent developments with CIJE. While I've only been away less than three months, certainly a great deal has happened with CIJE. I read over the materials on the Lead Communities and the minutes of the Senior Policy Advisors in January, and then the annual meeting a week or so later, and there does seem to be some important momentum underway. Earlier I also had a letter from Barry Holtz about his work with Lead Communities and Best Practice. I've also just written a letter with some suggestions to him. I am ready to get involved further as other meetings may be scheduled in the spring months. I will be away finishing up my sabbatical with a stint in Argentina and then in South Africa, working with Jewish communal leaders during the months of May and June.

My work in Israel was very exciting and I think I was helpful. Most of my time was spent both teaching and doing research on the use of informal education with adult groups visiting in Israel. I'm continuing that project now that I'm back home. It relates in many ways to some of the ideas which are beginning to get focused in the CIJE initiatives.

While in Jerusalem I spent some time talking with Seymour Fox. He encouraged me to write to you. I think a particular expertise, both of me and of my colleagues at the Hornstein Program at Brandels, is in the roalm of informal Jewish education and our faculty is determined to make this a central direction for our future growth. The idea which emerged from my conversation with Seymour was the possibility that our Brandels faculty might be a resource for you to think about in some of the training of personnel working on the innovative education projects in the Lead Communities. In addition to informal education, I would list two other realms in which I think we could be helpful. One such area is in the creation of responsive organizational environments which will help educators be more aware of ways of responding to students, young or old, and also of working with families in ways that assure the motivation and commitment of the students. Another area of special competence is the relationship between lay and professionals. Given that our program generically educates Jewish professionals, including educators and more traditional communal workers, we spend a good deal of time on helping people develop good collaborative relationships between volunteers and professionals.

A primary faculty which would be available for this kind of consultative/training work include Susan Shevitz, Joe Reimer and myself. I hope we'll have the opportunity to talk further about these matters at some point in the near future.

Best regards.

Sincerely,

wie. Bernard Reisman

Director

ng

cc: Dr. Seymour Fox

# TELEFAX

DATE: 12/21/92

FROM: Shulamith Elster

h Elster FAX #: Number of pages (including this sheet)

TO: ANNETTE HOCHSTFIN

# MEMORANDUM

TO:	Annette Hochstein	DATE:	December 21, 1992
	Annette Hochstein cc: Art Rotman Shulamith Elster		
FROM:	Shulamith Elster	SUBJECT:	Lead Communities

I know that this is a very busy and productive time for you. I am certain that the Institute Board meetings will go well, as they have always been so carefully planned and executed.

There are a number of items that I feel I should bring to your attention, most particularly since I will be away from the office December 24th through January 3rd, returning for a busy January on the 4th. If there is any action required on the following, please fax or have Shmuel fax or phone.

- 1. See attached memos from Art regarding Atlanta. I was hoping that we might schedule a visit for Barry to meet with either lay leadership or educators in January. How do you think I should proceed now with the scheduling of these visits?
- 2. Re: Best Practices materials to Milwaukee and Atlanta I am meeting with Barry all afternoon tomorrow, and you have already received my memo with the progress report. What do you suggest? Shall Barry call both communities and speak with the planners and give them the status report? This he might do in conjunction with setting a time for a briefing.
- 3. The meeting in Baltimore went well, I thought. Julie was there and will include her observations in her report. There is great interest. There were good questions and a record turnout which may, in part, have been due to the business agenda for the evening as well.

Bob Abramson was in Baltimore for other business last week and reported to me that the local Conservative rabbis and leadership are not yet in the communications loop and know very little about the project. This suggests to me that:

1. We have to get the go-ahead from the Associated to schedule briefings by Barry. Can we go ahead with this now that Art has been to town.

2. We will have to move ahead with our own recommendation for how the concept is to be introduced. I would like to see us move in these directions in Atlanta as well.

I imagine that once Art has a Milwaukee date scheduled that this will proceed very smoothly there.

4. News from Milwaukee Department: Bader Foundation called this morning to say that they were also given an additional \$150,000 for the funding of Jewish education projects in Milwaukee (in addition to the position). Some \$50,000 of this will go to local scholarship funds and the other \$100,000 to fund a variety of other projects...some in connection with our work.

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# MEMORANDUM

To: Shulamith Elster

Date: December 18, 1992

From: Arthur Rotman

I spoke to Steve Gelfand on December 17.

I was following up on a meeting we had scheduled some time ago. Prior to my call, I sent him the enclosed fax.

Steve suggested that it would not be appropriate at this time to consider the meeting with Mandel as his lay people were "impatient with the lack of momentum."

Accordingly, we cancelled my proposed January meeting in Atlanta.

Address: 163 Third Avenue #128

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

BBC: SRE EG

# TELEFAX

TO: Stephen Gelfand

DATE: December 17, 1992

FROM: Art Rotman

FAX #: (404) 874-7043

Number of pages (including this sheet) 1

MESSAGE:

Confirming our meeting in Atlanta on Thursday, January 7, with Dave Sarnat, yourself and whomever else you think appropriate.

I hope to have lunch that day with Gerald Conen who, as you know, is a member of the CLUE Board. I will come over to Federation immediately after, which should be between 1:30 and 2:00 p.m. Please allow up to 4:30 p.m. for our meeting, although my guess is that it may not take that much time. These are my suggestions for the timing of the meeting, but I am flexible. If you have alternatives, let's discuss.

The main agenda item will be the planning for a meeting of those of your top potential funders for local Jewish education projects who would be interested in meeting with Mort Mandel, chairman of CIJE. (Will discuss the date possibilities. Mort Mandel is available to come to Atlanta for the purpose on March 26th.) Another agenda item is the disposition of the suggestion for a \$40,000 one-time grant by CIJE for the hiring of planning staff. If time allows, I am sure we will get into related matters.

Took forward to hearing from you.

# MEMORANDUM

To: Shulamith Elster

Date: December 18, 1992

From: Arthur Rotman

In recent conversations I have with both Milwaukee and Atlanta, they are anxious to get:

- Material on Best Practices

Would you please take it from here.

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People of exceptional intelligence are a prized business asset. But as any manager of a budding or full-blown genius knows, there are pitfalls. One of the most common cries of the anguished manager in this situation is: "How could be have been so at pupil?"
 Why do smart people du dupth things?

Why do smart people do dumb things? Having studied a wide assortment of weird decisions and actions by highly intelligent executives, 1 have formulated a principle: Strong intelligence seeks to subject itself

This theory might help to explain acts of bizarre self-destruction like that of Stephen Chao, the high-flying president of Fox Television Stations and Fox News, who arranged for a male stripper to perform at a high level conference. Among those not amused were Defense Secretary Dick Cheney, National Endowment for the Humanities head Lynn Cheney, and Rupert Murdoch, Mr. Chao's boss, Shortly after the stripper departed, Mr. Chao was flred.

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enterprise loward the plnnacle — or the precipice. One danger is their unwillingness to admit the need to change. "When stnart people all agree with each other about a plan," observes Mr. Wesley, "they're apt to stay with the plan too long, even after others have seen that the direction is wrong."

• Feedback deafness: Most of us rely on feedback-although we may become impatient with it. ("Quit bothering me with facts!") Some bright people are so impatient with their slower associates that they find it impossible to listen to them.

"That impatience," says Robert Shiver, CEO of Senses International, "can

# Manager's Journal

By Mortimer R. Feinberg

be a dangerous frap. Feedback is essential, no matter how brilliant or respected the

people are not always tremendously miture. They may sulk at having their proposals reviewed by those they consider the mental inferiors. But don't be intimidated Be firm in subjecting all thinking, wha ever its origin, to the same standards.

• Provide the genius with structure, just let her do her own thing," says a bos of an unusually brilliant subordinate "You have to allow complete freedom to people like that." This 100% iaissez-fair attitude toward managing brilliance is sometimes a well-intentioned effort at the ating the proper environment for super smart workers. Sometimes, though, it's c cop-out by a boss who doesn't know what else to do. Usually it's a bad idea.

Bright people may resist structure, but they need H. Suspending the rules for your top brains is no favor to them. Apart from, the fact that it makes them the target of resentment by their colleagues, it may encourage their most self-destructive, loose-cannon tendencies.

When smart people are supported by

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

# TELEFAX

DATE: 12/18/92

FROM: Shulamith Elster

FAX #:

Number of pages (including this sheet) \_\_\_\_3

TO: Annotte Hochstein

cc: Art Rotman Barry Holtz Jim Meier

I though you would be interested in seeing this project of the New American Schools Corporation. The expectations of the communities are handled in a very interesting fashion. Perhaps this is a format that we could discuss.

# Community Learning Centers Request For Proposals

#### Introduction

The New American Schools Corporation has awarded a grant to Public School Incentives for its Community Learning Centers Project (CLC). We are looking for communities eager to create new public schools which meet "world class educauonal standards," that is, people who think this is the chance of a lifetime. Our selection of communities is a two stage process:

- From brief applications, we will select communities to receive planning grants to help prepare their final proposal.
- The second stage involves selecting the actual sites from first stage communities. These pilot sites will implement the design for the Community Learning Centers.

American business leaders created the New American Schools Development Corporation as a private, non profit, tax exempt organization to support the design and establishment of new high performance learning environments. The aim is to show how to transform schools for a quantum leap in learning for American children and youth.

We are looking for people and communities who want to create some of the most extraordinary schools in the world. We're looking for people who believe that schools can make an enormous difference in the lives of young people and families; and for people who believe that a school's continued existence should depend on all students achieving at very high levels.

These urban, suburban and rural restructured schools will serve as headquarters for learning for all ages with emphasis prior to and during the K-12 years. They will address national educauon goals by combining effective learning principles with restructured management to produce and be accountable for major gains in student achievement. They will provide integrated on-site social services for pre-schoolers, students, and their families to ensure consistent reinforcement of learning processes and to address the student and family complexities of modern society.

"Community Learning Centers" is the term we use to describe the new schools we will help develop. Our expectations for these Centers are listed below with the grant application process.

# Community Learning Center Expectations

- 1. Students
  - 1.1 Community Learning Centers must serve a cross section of students. These centers may not screen out students on the basis of past achievement or behavior.

- 1.2 A Center's student body must be representative of the community it serves (race, socio-economic status, academic ability). They may not be designed only for "at risk" or "gifted" students.
- 1.3 Students must be treated as resources who will, as part of their studies, contribute to the program and community.
- Each student must have an individualized learning plan.
- 1.5 No student is to be assigned to this program. The family chooses or selects this program.
- 2. Curriculum and Program
  - 2.1 Community Learning Centers will promote cultural diversity as an opportunity, not a problem. They will integrate perspectives from many cultures into the curriculum.
  - 2.2 Each Community Learning Center will adopt "world class standards" and assessment methods approved by the project.
  - 2.3 Tc avoid reverting to the status quo, Community Learning Centers will commit to progress reviews. They will use formative data and make data-driven decisions regarding improvements.
  - Centers will use the total community as the school campus and curriculum.
  - 2.5 Curriculum must include opportunities to help serve others and solve real problems.
  - 2.6 Centers must commut to a new learning design that engages all learners.
  - Graduation must be based on a demonstration of skills and knowledge.
- 3. Personnel and Staffing
  - 3.1 Personnel must be a part of this program by choice.
  - 3.2 Centers must emphasize the role of teacher as facilitator and orchestrator of learning.
  - 3.3 Centers will use alternative staffing patterns and commit to the concept that staff includes licensed/certified teachers, aides, students and others.
  - 3.4 Centers must have a mechanism for counseling out ineffective staff.
  - 3.5 Centers must commit to allocating 20-30 days for staff development each year, every year.
  - 3.6 Centers must actively involve parents as partners in their child's education.
- 4. Relationship to Community and Other Organizations
  - 4.1 Each Community Learning Center will bring together and gain the support of a variety of community groups.
  - 4.2 This support must be broad based, and include representatives from governmental bodies, school administration, local businesses, agencies, parents and other community members.

- 4.3 The centers must integrate social services, preferably at the school site.
- 4.4 Centers must use facilities that meet local health and safety codes.

#### 5. Operational/Financial

- 5.1 Each Community Learning Center will have an explicit contract with a local school board or other legislatively authorized body with continued funding dependent on achieving major improvement in student outcomes.
- 5.2 This contract will give people at the center the power to make decisions on program, personnel and budget.
- 5.3 Community Learning Centers must have all the education dollars a student represents, including local, state categorical and federal. A district may keep five percent for the administrative services it provides. The center may choose to purchase services from the district.
- 5.4 These centers will be open 12 or more hours per day, potentially year round.
- 5.5 These centers must operate at the same per pupil cost, aside from initial start-up costs, as other district schools.

# Grant Application Process-Section I: What are we looking for?

In making planning grant awards, we will look for the following:

- A demonstrated understanding of the extraordinary mission of New American Schools and the CLC project.
- Evidence of significant involvement in planning and support for the proposed center by members of its communities, including parents, students, educators, governance board members, school administrators, business leaders, elected officials and others. The planning group must be representative of the community to be served.
- 3. Creation of a new kind of school. However, no family, student or educator should be assigned to the program: it should be a choice, preferably among several options, but at least between the new CLC and the existing program. If the CLC takes the place of a community's total current programs, other choices must be made available through other means.
- A fundamental rethinking of the way learning, teaching and schooling is organized for students and educators.
- Inclusion of the ideas listed above under <u>CLC Expectations</u> in terms of students, curriculum and program, personnel and staffing, relationship to the community and other organizations, and operational/financial.
- 6. Award winning proposals probably will include some ideas not listed here. We are looking for communities which will combine the best and most powerful approaches available for creating new, comprehensive schools and have educators, parents and community

members ready to make this a reality. Proposals incorporating only one focus (such as TQM, parent participation or youth service) will not be funded.

# Grant Application Process—Section II: What format should the proposal follow?

We require no more than a five-page application post-marked by January 8, 1993. The application should summarize the proposal in one or two paragraphs and then answer the questions below. CLC staff will provide feedback within three weeks.

- Why do people in your community want to do this?
- 2. Who was involved in developing the proposal? What was their role? (Potential sites may be visited. We must have clear evidence of a broad base of support in preparing the proposal and supporting its implementation.)
- 3. What kind of programs do you want to create? How will the ideas in Section I and the expectations listed above be incorporated into your program? How will your project increase student achievement and improve student attitudes? (Please be specific.)
- 4. What is your budget for this project? What local resources have been committed to help you reach your goal?
- S. What local commitment is there to help the program continue after it starts?
- 6. What is your project's time line?
- Who will be the contact person and fiscal agent?

#### Send applications to:

Community Learning Centers 2550 University Ave.W, Suite 347N SL Paul, MN 55114-1052

Based on these applications, we anticipate making up to 20 planning grants. No planning grant will be for more than \$5,000. Each community receiving a planning grant will assemble a planning team, including teachers, administrators, students, parents and other community leaders. These teams will be invited to a two-day workshop to discuss and refine their ideas for the pilot site stage. Detailed guidelines for the final proposals will be provided to all community teams receiving planning grants. We anticipate providing implementation grants to about ten sites to adapt and test the design being developed by us.

Pilot sites will receive additional funding over the next several years, contingent on our continued funding from the New American Schools Corporation. These grants will be for start-up costs (\$100,000 to \$200,000). Sites will also receive on-site technical assistance.

For questions call Wayne Jennings of David Alley at 612-645-0200, Joe Nathan at 612-625-3506. Elaine Salinas at 612-348-8550. For legal questions call John Cairns at 612-334-8532.

221308

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

FAX: (212) 213-4078

# **TELEFAX**

December 17, 1992 DATE:

FROM: Shulamith Elster

FAX #:

Number of pages (including this sheet)

# TO: ANNETTE HOCHSTEIN and the second second

THE FOLLOWING ATTACHED:

1. 10/28/92 Communications Plan: Draft #2

THIS WAS FROM AN OCTOBER A SIGNMENT. THOUGHT YOU WOULD LIKE TO SEE IT.

2. THIS MEMO TO ART WAS BASED ON A MEETING WITH SYLVIA ETTENBERG, ALVIN SCHIFF AND YAAKOV RABINOWITZ EARLY IN NOVEMBER (Memo: National Board of License (12/14/92

3. This is FYI on the Israel Experience

221308

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

## MEMORANDUM

TQ:	CIJE Inner Staff Art Rotman Sol Greenfield Jack Ukeles	DATE:	October 28, 1992
FROM:	Shulamith R. Elster	SUBJECT:	Communications Plan: Draft #2

#### WORKING ASSUMPTIONS

- 1. The CIJE should develop a coordinated communications program to reach the following constituencies:
  - CIJE Board of Directors
  - Large City Federation Executives, selected national agency executives (not included on Senior Advisors, e.g., UJA)
  - National organizations/denominations
  - Senior Advisors
  - Jewish press ( and through it, the Jewish community-at-large)
  - Jewish education community
  - Current and potential funders
- Each requires an approach that will keep them informed about our progress, specific projects and initiatives, and focus attention on key issues related to CIJE goals and agenda.

3. Types of formats for communication include:

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- memoranda, format reports from the CIJE, occasional letters from the Chairman, periodic reports from project directors,
- press releases to announce major events/developments to a wider print `
  audience,

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- oral presentations to groups,
- · visits to communities by leadership and staff,
- public events (e.g., sponsorship of forum at GA in 1991 and 1992).
- The Annual Meeting of the CIJE can also be an important communications activity (such as was held in January 1992).
- Visual representations -- logo, banner, and logo use on letterhead, releases and stationery.
- 6. Print materials -- brochures, information packet, list of printed materials (A Time to Act, Commission papers)
- Responsibility for communications to be assigned with specific and occasional assignments to be undertaken by all staff members, consultants, and sponsoring organizations.

# CONSTITUENCIES

L CIJE Board of Directors

Board members used to receive minutes of meetings and background material for meetings. No minutes have been sent from the August Board meeting. There have been occasional memos from the Chairman, Camper contacts have been generally limited to before and after meetings of the Board.

PROPOSAL: A letter from the Chairman every two months on the following schedule:

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Nov. '92/Jan. '93	Post GA in anticipation of a February Board/
	Annual Meeting
Spring 1993	
June/July 1993	Progress Report/Year in Review in
	anticipation of an August Board meeting

### 2. Large City Federation Executives

Consult with Steve Hoffman and perhaps other Senior Advisors (Shrage, Friedman) and Sarnat to develop best approaches beyond Chairman's letter.

### 3. National Organizations and Denominations

Need to develop list of key organizations -- beyond co-sponsors and denominational groups with which CIJE already has contact -- and formulate plan to reach (if appropriate) this list. Maximize use of Board members and Senior Advisors from these groups.

### 4. Senior Advisors

Senior Advisors meet twice a year, generally a month in advance of Board meetings. Minutes, actually summaries of meetings, were mailed. Background materials are mailed in advance of meetings.

### PROPOSAL

Meetings twice a year in New York where majority of advisors work. Occasional letters or memos from Education Officer. Copy of MLM letter to Board (?)

5. The Jewish Press

Develop roster of key contacts at JTA and national level and at local level (New York, Atlanta, Baltimore, Milwaukee). Press releases keyed to major announcements and meetings. Consider role of Jewish magazines -- independent and those sponsored by sponsoring and other national organizations and denominations. Press packet to be developed. Press clips to be organize

- Jewish Education Community
   Stress communication role of Senior Advisors. Participation in conferences, CIJE as an educational resource may be best approach.
- 7. Potential continental funders

Discuss future approaches with Art Naparstek. Consider special type of occasional letter to this constituency. Importance of personal contacts.

### A CIJE NEWSLETTER

#### PROPOSAL:

This proposal for a newsletter entitled *INITIATIVES* reflects discussions with Jonathan Woocher and a preliminary proposal from JESNA to undertake this assignment.

- 1. PURPOSE:
  - To keep constituencies noted above informed about CIJE work and progress.
  - To highlight specific initiatives being undertaken under CIJE sponsorship or with its collaboration and support.

- To focus attention on key issues related to CIJE goals and activities
- 2. CONTENT:

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add ar de

 A feature article in each issue on a timely aspect of CIJE's work, e.g., Lead Communities, Best Practices

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Updates on other projects

UIJE

- Lead Community activities
- · Profiles of involved lay leadership, consultants, staff
- Insert articles on themes related to CIJE's work such as recent Holtz article on educational change, reprints from educational publications, or from CIJE partners, think pieces by Board members, consultants or staff statements about Jewish education from a variety of sources that provoke thought and comment.
- 3. FORMAT:
  - Eight pages plus inserts (?)
  - Three hole punched for reference
  - Clean layout/easy to read/use of pictures and charts as appropriate

## 4. EDITORIAL PROCESS:

JESNA to compile and edit on behalf of CIJE. A mutually-agreed upon editor will have responsibility for production working under the supervision of Jon Woocher in close consultation with senior staff. A small editorial board of CIJE Board members and educational professionals to be established to deal with overall policy issues.

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5. COST:

Cost will depend on the following factors:

- Circulation (as many as 10,000?)
- Production methods and values (i.e., type set/desktop/type of paper/colors)
- Number, type, and length of inserts
- Editorial and support staff time required
- Availability and cost of outside production assistance.
- 6. FYI:

JESNA Update/staff time, desktop publishing layout, printing, distribution of 2500 copies of two issues per year is approximately \$20,000.

7. SCHEDULE:

Editions two to three times a year. To be coordinated with communications with constituencies.

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COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

# MEMORANDUM

To: Art Rotman Date: December 14, 1992 From: Shulamith R. Elster Re: National Board of License

I was contacted by the National Board of License with a view to how they can work with the CIJE in a manner that both furthers their own particular interests and advances the CIJE's work most especially within the Lead Communities Project. Alvin Schiff wrote to Mort about this last summer, and I have been asked to respond to the inquiry about possible support. I would like to have the benefit of your thinking as to how to best proceed.

The National Board of License (NBL) asked for this meeting to:

- Brief the CIJE on the work of the National Board of License
- Discuss the current status of the National Board of License and the challenges to its survival
- · Explore opportunities to work together with the CIJE
- Explore opportunities for the <u>funding</u> of its activities so as to insure its future

The former AAJE provided support staff and services to the NBL, and, with the creation of JESNA, this was moved to JESNA. Now that JESNA has reordered its own priorities, Paul Flexner's time assigned to the NBL is severely limited. It is unlikely that the NBL will continue to function within JESNA. Thus, the future of licensing and accreditation of teachers through the NBL is truly at a risk.

At a time when discussions of standards, licensing and accreditation are foremost in the thinking of educational leaders, it is interesting that this mechanism for Jewish education is without support.

The National Board of License consists of fourteen professionals who represent fourteen different groups -- training institutions and professional organizations. The NBL meets twice each year and in between formal meetings functions within a committee structure.

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To: Art Rotman

Re: National Board of License

The NBL is literally "fighting for its life" and is in need of support for the following types of activities:

- 1. Professional staff at 1/4 time to manage the NBL and promote its mission and handle its affairs.
- Publications brochures, etc., to promote the licensing of teachers and educators.
- Funding for presentations, a newsletter and advocacy among educator groups, travel to conferences and workshops, and for site visits to the local boards of licensure throughout the country.

I would like to recommend that the CIJE:

- a. Assist in the effort to find funding for the NBL in the interest of the fulfillment of the CIJE's mandate to "build the profession"
- b. Join with the NBL in a pilot effort in the three Lead Communities to advocate licensure, include in our educator survey interviews with teachers and educators to promote counseling for educators seeking certification.

DEC 17 '92 02:26 PM CIJE THE CRB FOUNDATION C/O TEL:212-595-T090

LA FONDATION CRB THE CRB FOUNDATION קרן קרב

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JESNA:	Jon Woocher
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CIJE Res	ource: Shulamith Elster
CRBF:	

Tom Axworthy

John Ruskay Mark Charendoff Barry Chazan A F.Y.I. This has been sent to all Federation exectlyives and directors of savings plans

pages Total\_ 6

Trwin Kola For Information concerning this transmission can. Sheryl Flatt, (212) 595-7087

c/o Alizaham Joshiya Heschel School + 970 West 89th Street + New York City, 10024 (212) 595-7067 + FAX: (212) 595-7090 THE ORB FOUNDATION C/O TEL:212-595-7090

# The Israel Experience Community Initiative Pilot Project

a collaborative effort of The CR13 Joundation. CJJ. JCCA. JCSNA, and UJA

December 15, 1992

Dear Friends,

As you know, The CRB Foundation produced a short video for the recent General Assembly in New York. The video was intended to motivate lay leaders to support Israel youth travel when they returned to their respective communities.

The video was well received, and many of you took the time to convey your very positive reactions. Additionally, you asked about the future use of the video as we collectively promote youth travel to Israel.

We are now working on modifying the GA version for use at other lay leader conferences, conventions, and community functions. This new version, which will include Mr. Bronfman's comments encouraging lay leader support and action at the local level, will be ready in January. Additionally, we are developing collateral material that will outline the most effective ways to present and supplement this "lay leader video".

Regarding the use of video in your own promotional efforts, we are also analyzing the potential of creating a "core consumer video" that generally promotes Israel youth travel to teens and parents. Each agency would be able to supplement the "core consumer video" with its own promotional message.

Please return the questionnaire by January 8 in the enclosed stamped envelope. Thanks for your help. We'll keep you posted on further developments.

incere Peter Geffen Youth Trips Officer, N.A.

cla Abraham Joshua Heschel School • 270 West 89th Street • New York, N.Y. 10024 (212) 595 7087 • fax: (212) 595-7090

a collaborative effort of the CRB Joundation, CYJ. JCCA. JESNA. and UJA

## THE USE OF VIDEO AS A SALES TOOL FOR THE ISRAFL EXPERIENCE FOR TEENS

1. Please list your primary sales tools and rank each according to how important it is to your overall sales efforts. (Sales tools include brochures, ads, video, slides, posters, etc.)

	Least Important			Most Important	
Item	1	2	3	4	5
	1	2	3	4	5
	1	2	3	4	5
	1	2	3	4	5
	1	2	3	4	5
	1	2	3	4	5

If you currently use a video, please continue with <u>Question 2</u>. If you do not currently use a video, please continue with <u>Question 6</u>.

2.	When was your video produced?
	By whom?
	At what cost?
	Running time?
	How often is it shown?
	How many teens see it per year?
	How many parents of teens see it per year?
	When are you planning to produce a new video?

3. How would you summarize the central theme of your video?

a collaborative effort of the CRB Joundation. (47). JCCA, JLSNA, and UJA

4. Who is the primary target of your video?

\_\_\_\_\_Parents \_\_\_\_\_Teens \_\_\_\_Equally parents and teens \_\_\_\_Community leaders

- 5. Do you use your video to encourage community support for your program?
- 6. The CRB Foundation showed a video at the recent General Assembly which was <u>intended to motivate lay leaders to support youth travel to</u> <u>Israel</u>. Would you make use of this video in your local community? If yes, please describe how you would use it.

7. If we were to add a few minutes to the GA video, what additional information would you suggest that might inspire or motivate lay leader support?

a collaborative effort of The CRB Joundation, CJJ, JCCA, JESNA, and UJA

8. If you could produce a personalized ending identifying your program to the CRB video used at the GA for a cost of approximately \$2,000, would you do it? If yes, how might you personalize the video?

9. If The CRB Foundation were to produce another video that generally promotes the Israel Experience to teens and their parents, would you use it?

# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

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

# TELEFAX

BATE: 12-17-92 FROM: ShulaMith TUISTER

FAX #: Number of pages (including this sheet)

TO: Canetle Noch steen

COUNCIL FOR	INITIATIVES IN JEWISH	EDUCATION	
Mailing address:	163 Third Avenue #128	٠	New York, NY
10003			
Phone: (212) 532-	-1961		FAX: (212)
213-4078			

### MEMORANDUM

TO: Art Rotman DATE: December 16, 1992 Annette Hochstein cc: Barry Holtz FROM: Shulamith Elster SUBJECT: Senior Advisors Meeting: January 1993

- 1. The Senior Advisors formerly Senior Policy Advisors -- have not met as a group since January 1992. Individual members of the group undertook assignments during the Lead Communities selection process and several attended the February Annual Meeting of the CIJE, but other than that, we have not made any effort to truly "keep them posted" or involved.
- 2. I think the group has been very helpful in the establishment of the CIJE role as an intermediary -- that is, the CIJE and its agenda have been accepted and encouraged by the organizations, movements and denominations. The public relations value - and some good advice should not be underestimated.
- 3. We now have a new concept evolving. The advisors should perhaps meet only once a year and their role be less deliberative. For real advice, we plan to turn to a small core group. This new group would consist of individuals such as Jack Bieler, Josh Elkin, Elliot Spack, Jon Woocher, Sara Lee, John Ruskay and others yet to be identified.

- 4. For the January meeting: Materials I would like to mail materials two weeks in advance. At the moment, I think they should include the latest papers and reports on Best Practice (Barry may have to do a version of his last report for this particular audience) and Monitoring, Evaluation and Feedback. The group received Adam's paper last year, but it was never an agenda item. I would like to send the paper again-with an update perhaps by Ellen. A copy of the Chairman's Letter to the Board, will bring the group up-to-date on a variety of items.
- 5. Agenda:

<u>Best</u> <u>Practices</u>: Barry and one of the consultants on supplementary schools - possibilities include Carol Ingall, Joe Reimer, Sam Joseph.

Monitoring, Evaluation and Feedback: Ellen and one of the field researchers - Roberta or Julie, or both.

<u>Foundation Approaches</u>: If you think the group can be helpful in either reacting to ideas presented by Art or generating new ones?

<u>Lead Communities: Two Perspectives</u> Planner from one of the communities - Marshall Levin or Howard Neistein.

Educator from one of the communities: Chaim Botwinick (Baltimore) and Stuart Seltzer (whose school was a Best Practice Conservative supplementary school, Ramah veteran, at Chizuk Amuno Congregation)

Cheryl Finkel (Atlanta) who is Chairman of Solomon Schechter Principals Council.

As this appears to be becoming a full agenda, perhaps the Foundation item should be eliminated.

6. I would like to see this as an agenda item for a telecon between Art, Annette and myself very soon.

Fax Memorandum TO: Annette Hochstein cc. A. + Rato FROM: Shulamith Elster RE: Milwaukee DATE: December 17, 199 

I spoke at length yesterday to Howard Neistein who called to tell me about the first meeting of the Steering Committee. Enclosed are notes from the meeting which I think you will find of interest.

We spoke about Barry's visit to the community after the next meeting of the group. This would be sometime February-March. This will, of course, be coordinated with Art's visit- which as of today still has not been confirmed. If possible, a trip by Barry that would combine the lay and educator groups would be ideal.

Today (Thursday) I will be leaving early in the afternoon for Baltimore and on Friday I have a meeting with Richard Joel to help focus the Best Practices- campus work. This is preliminary to my own meeting with Barry on Tuesday about next steps with Best Practice as well as the pilot projects.

I would like to contact Atlanta and Baltimore regarding meetings with educators and particularly presentations by Barry on both Lead Communities and Best Practices. If you think that this is not appropriate at this time, please let me know by fax by Monday (here in New York). I understand that these meetings have to be part of a larger plan, but the way community calendars are set, we may need to schedule now for February-March meetings.

Also, I want to remind you (and Art and myself) that if we are going to use the April CJF Quarterly for lay or professional (or both) meetings, we have to let people know to "hold the date" and we have to begin our own internal work on the agenda, assignments and the like.

Best regards. I am certain your Institute Board meeting will go well.

S,

- P.S. A reminder: Shmuel or Dani was going to send me I. the preliminary work on the Curriculum for the Educated Jew/ goals project 2. your current thinking on the Commissions so that
  - I can integrate it into my own.

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#### Steering Committee for the Commission on Jewish Education Monday, December 14, 1992 5:30 p.m.

#### Summary Notes

Attendance: Dan Bader, Brad Bernstein, Maris Bock, Alan Borsuk, Claudia Cohen, Jane Gellman (Co-Chair), Betsy Green, Judy Guten, Zachary Harris, Stan Jaspan, Rick Marcus, Ina Regosin, Steve Richman, Bonnie Shafrin, Louise Stein (Co-Chair), Jerry Stein, Bonnie Sumner, Jerry Tepper, Eve Joan Zucker, and Howard Neistein, Staff.

#### I. Welcome/Introductions/Opening Remarks

Commission Co-Chair, welcomed Committee Gellman, Jane participants. She explained that in assembling the Steering Committee, an effort was made to include people who have demonstrated a commitment to the community and an appreciation that Jewish Education makes. An attempt was also made to appoint a Steering Committee whose members collectively constitute a balance of perspectives on Jewish Education and have credibility within the Federation and within specific agencies, schools and synagogues. She noted that while each of the members is recognized for having a broad community perspective, that they can enrich the process through their sensitivities toward the institutions and organizations that they are involved in. Mrs. Gellman reviewed the progress to date since the Federation Board had approved Milwaukee's participation in the "Lead Community Project" and thanked the Bader Foundation for its funding support of the Project Coordinator for the first year. She invited all Steering Committee members who were available to participate in the interview process. Committee members requested that there be some standard questions available for Committee members at each interview.

Louise Stein, Commission Co-Chair, presented a Jewish segment piece on the importance of Jewish Education to building community, based upon the writings of Rabbi Irving Greenberg. She noted that a similar segment will be included in each subsequent Committee meetings.

#### II. Visioning

As a precursor to discussion about organizing the Commission on Jewish Education, Jane Gellman asked Committee members to spend some time talking about what outcomes our community should strive for through the project. She asked Committee members to respond to the following questions:

A. How does someone with a positive Jewish identity behave?

CIJE

#### Page 2

- B. What is the role of Jewish Education in contributing to a positive Jewish identity?
- C. What services/programs are necessary to sustain these elements in the community?

Committee members comments included the following:

- A. Elements of a Positive Jewish Identity
  - A knowledge and a positive feeling towards the State of Israel and a desire to go there.
  - Someone who applies Jewish values to daily living.
  - A knowledge of Jewish history.
  - A sense of bonding with others Jews.
  - Participation in the Jewish community.
  - Taking responsibility for others in the Jewish community K'lal Yisrael.
  - Growth through Mitzvot.
  - Carrying one's Judaism into the community.
  - Active studying of Judaism.
  - Jewish pride.
  - Identification through the Bebrew language.
  - Being able to define why it is important to be Jewish.
  - Maintaining a Jewish home.
  - Raising Jewish children.
  - Desire to perpetuate Judaism.
- B. Role of Jewish Education
  - Motivates a desire for Jewish identity.
  - Respect for Jewish learning.
  - Education should lead to doing.
  - Imparting Jewish knowledge "Ignorance is a barrier to education".
  - Baving a basic set of skills to lead a Jewish life.
  - Giving one a sense of comfort in different Jewish community settings.
- C. Communal Opportunities
  - Institutions that compliment one another.
  - An organization that manages the overall structure.
  - Funding.
  - A variety of institutions serving different age groups such as high schools, day schools, preschools, adult education and synagogue schools.
  - An opportunity to come together in a Jewish communal setting.

Page 3

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An opportunity for every person to experience Israel.

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- A diversity of programs that respond to different needs in the community.
- A desire for the pursuit of excellence.
- Qualified personnel in all settings.
- Education that is both affordable and accessible.
- Supplemental opportunities to public schools. Support for Jewish Education in the community and a general feeling that holds learning in high esteem.
- Opportunities that engage people throughout their lifetime.
- III. Mrs. Stein presented a model for organizing the Commission on Jewish Education and outlined roles and responsibilities undertaken by the Commission as a whole, the Steering Committee and various Task Groups that would be created throughout the process. The model envisions a relatively large body of people that who constitute the Commission.

Roles and responsibilities include:

- Primary issues in improving Jewish Education and setting 1. priorities for addressing them.
- Defining what Task Groups are to be formed to address 2. specific issues.
- Adopting an overall 5 year plan and an implementation з. plan for each year.
- Monitoring and evaluating progress of the Project as a 4. whole.
- Identifying sources and approaches for potential funding. 5.
- 6. Communicating progress and results to the community groups in an effective manner.
- 7. Marketing involvement for the process.
- Advocating the importance of Jewish education to the θ. community as a whole.

The Steering Committee would focus its attention on the Commission's process. Specific responsibilities include:

Organizing the Commission and framing its work plan. 1.

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Page 4

- 2. Reeping the Commission focused so that results are achieved.
- 3. Serving as a liaison to the Federation.
- 4. Problem solving/agency relations.

During the process, different Task Groups would be formed around specific issues. Their responsibilities would include:

- 1. Defining the problems and opportunities associated with specific issues.
- 2. Analyzing the issues and the community's ability to address them.
- 3. Identifying goals and objectives for intervention.
- 4. Proposing strategies/program initiatives (possibly in conjunction with "Best Practices").
- 5. Identifying a method of evaluation.

Mrs. Stein emphasized that one of the goals of the Project is to engage as many people within the community as possible both through the formal structure and activities such as focus groups, open meetings, interviews and surveys. It is hoped that the Project will facilitate gaps in service and strengthen what is already in place.

In organizing the Commission, the following questions were addressed to the Steering Committee:

- 1. What should be the size of the Commission? How is representation on the Commission balanced with its ability to function?
- 2. How are professionals utilized throughout the process?
- 3. What is the process for selecting Commission members?
- 4. What decision making authority is given to the Commission as a whole, to the Steering Committee and to individual Task Groups?

A number of Committee members responded that the Commission should be as inclusive as possible and might even be redefined as a Consortium. Its primary function would be to build consensus and to communicate to the community as a whole. Since there would be no "cap" on the size of the Consortium, . . . . .

Page 5

it was felt that either the Steering Committee would in effect be the ultimate decision making body. Others felt that while membership on the "Consortium" would involve a larger group of people, that withholding decision making authority to the group would detract from the quality of participation and the ultimate ownership of changes proposed through the Project. Concern was also expressed about perceptions by the stakeholders that actual decisions were being made behind "closed doors". They felt that while the Commission as a whole may be larger than is traditionally thought to be effective in decision making, it still must be empowered to do so.

It was agreed that the Steering Committee's first job would be to form the larger Commission/Consortium and that the actual model be further discussed at its next meeting on Monday, January 18, 5:30 p.m. Committee members were asked to begin compiling names to be involved in the process as a whole and discussion would focus at the next meeting on how people's energies could be best utilized. It was noted that the input of names to the process required consultation with a broader base of people that are currently on the Steering Committee. It was also pointed out that the consultation process to form the Commission could be an opportunity to help build support for the Project. The question of authority for decision making will be discussed further. Further instructions and materials are to be distributed prior to the next meeting.

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Page 18

Steering committee - Commission on Jewish Education

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	The Israel Experience
	Community Initiative Pilot Project Q M ( M ~
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	Fax # Fax #
	AGENDA MANAGEMENT GROUP MEETING 11:00 A.M. to 1:00 P.M.
1.	Conclusive Selection of Pilot Communities
	AMERICAB: JEWISH
2.	Challenge Grants: criteria and amounts Discussion and approval of Brian and Vicki's proposal
3.	Staffing structure and assignments
4.	Evaluation mechanism
5.	Setting of additional meetings
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# Proposed Operational Plan (as of Wed. 12.2.92)

# December, 1992:

Meeting of Consortium staff to plan agenda for community visits (December 15, 9am- 2pm). Evaluation methodology will be part of this discussion, with participation from Mr. Murray Glow of A.R.A. Consultants, Toronto, Ontario who has advised CRBF on several important evaluation projects in the past.

Meeting will to be scheduled towards the end of December of Advisory Committee made up of representatives of AZYF and members of the NAJYD Association.

# January ,1993:

Visit to community (two days) by 2-3 member team. Visit is preceded by receipt of key community data supplied by local Federation. Community is asked to schedule meetings over the two day period with all individuals, committees, agencies whom they feel are essential to the successful mobilization of community. Agenda for those meetings is open-ended, fact-finding in nature, with goal of accumulating as much data on local community as possible. Our goal is a diagnostic one: to determine the strengths and weaknesses of the local apparatus with the goal of returning with a proposed agenda leading towards an operational plan for that community.

# February, 1993:

Staff of Consortium holds several meetings with advisors (information/experience sources) from consortium members' appropriate staffs to piece together plan for the individual communities. This will be done for all four communities at the same time, thus allowing for efficient scheduling of staff visits, timing of development of materials, etc., financial planning consultation, feasibility studies of new local program initiatives, etc.

# March, 1993:

CRBF annual conference to which pilot projects will have been asked to send 5-6 representatives. An afternoon orientation session is planned for these people to meet each other and gain a broader perspective of the continental project.

Return 2-3 day visit from team assigned to community. General presentation of recommendations. Recommendations are not final directive. They are agenda setting in nature and begin a local process of focussed discussion and planning.

n collaborative offert of The CRB Joundation, CJJ, JCCA, JESNA, and MJA

April-June, 1993: Local communities schedule monthly meetings of Israel Experience Committee to which a Consortium staff member is available if needed. The period includes telephone conference time and much "hand-holding". Visits may be necessary by Management execs for fund-raising purposes and other leadership purposes.

Management group will meet monthly.

Staff group will meet every 2-3 weeks, or more often, as needed.

# **Consortium suitcase:**

1. Consultation services (scheduled through PG's office in NY) are available from the following staff members:

Vicki Agron	Mark Charendoff
Norbert Fruchauf	Barry Chazan
Len Rubin	Peter Geffen
Leora Issacs or Art Vernon	Irwin Kula
	Jay Levenberg
	John Ruskay

In addition, Brian Lurie has indicated his willingness to attend both events and meetings in pilot communities. It is suggested that other management execs do so as well. Personal involvement and participation of Charles and Andy Bronfman will also be most helpful to the task of motivating local leadership.

2. Topics include (but are not limited to):

New Trip Development Financial Planning: Savings Plans, scholarship endowment development, Bar Mitzvah Registry Local marketing studies Advertising/Publicity approaches Educational material development Promotional Video: maximizing usage, preferred settings, follow-up

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a collaborative effort of The CRB Joundation, CJJ, JCCA, JESNA, and UJA

Staff Training Evaluation and Research Program modules in Israel: identification, use, funding Placing the Israel Experience in the context of Jewish education Development of comprehensive pre and post programs Philosophical issues related to the place of Israel in NA Jewish life. Field visits to groups programs in Israel

3. Video is being completed for local community use. Exploration of recruitment video for parents and for teens is in process.

4. Proposal has been solicited from Comet International (Lewis Bernstein, President) for provision of a portion of marketing services and production of educational materials (video, interactive video, etc.)

5. Program for continental Savings Plan program is being presented to CRBF for final approvals. This program would be administered by Bank Leumi, thereby eliminating the enormous staff drain on smaller local communities in establishing incentive plans.

6. Marketing experience from the first and second years of the Joint Authority/CRBF marketing Initiative is being collected and prepared for use by the pilot communities.

7. Winnipeg will make its program available as a resource.

8. Bar/Bat Mitzvah registry programs currently being developed should be ready for pilot communities trials by June 1992. These represent important potential of inclusion of new, outside capital to the funding process.

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### Staff Deployment:

Each community will have a basic team of 3-5 who will work with that community through the three year period. Each team will have one coordinator who will work more closely with Peter as well as serve as the contact person for the community staff and lay people. Not more than 3 people would comprise an individual visitation team.

One model for the initial communities is: (\* indicates coordinator)

Atlanta	New York	Palm Beach	Toronto
Barry Chazan	Vicki Agron*	John Ruskay*	Mark Charendoff
Mark Charendoff*	Irwin Kula	Barry Chazan	Art Vernon
Len Rubin	Barry Chazan	Vicki Agron	Irwin Kula*
Peter Geffen	Peter Geffen	Peter Geffen	Peter Geffen
Norbert Fruehauf	Mark Charendoff	Irwin Kula	John Ruskay

Jay Levenberg will be brought in for marketing seminars and consultations as needed. CRBF will be funding Jay's services.

Page 1

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COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing Address: 163 Third Avenue #128 Phone (212: 532: 961 New York, NY 10003 FAX: (212: 213: 4078

TELEFAX

DATE: 12-15.92 FROM: Skilamita Cloten

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# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

## MEMORANDUM

TO: Art Rotman Annette Hochstein cc: Barry Holtz FROM: Shulamith Elster

### I. WORKING ASSUMPTIONS

- A. Pilot projects are important, in and of themselves, but also for their potential in providing a "jump start" for energizing activity within the local community.
- B. Pilot projects are to be developed around the "enabling options" so as to provide important building blocks for future work in the community in the critical areas of: mobilizing and building community support for Jewish education, personnel and Israel experiences.
- C. Pilot projects also afford an opportunity for the C JE to establish itself as a critical, important, able and effective resource to the community.

## II. DEVELOPING PILOT PROJECTS

- A. Barry and Seymour met (11/29) to discuss possible pilot projects and the process by which they will be introduced to the Lead Communities.
- B. Barry will assume responsibility for the content of the pilot projects and for the process.
  - 1. Projects are to include both formal and informal education.
  - Initial projects are to be developed around the three enabling options.

To: Art Rotman, Annette Hochstein

Agenda Item #2: Pilot Projects December 15, 1992

- C. Among the projects discussed at the 11/29-30, 12/1 meetings were possible activities in the following areas:
  - 1. in-service training of personnel -- focus on principals, initially
  - 2. seminars for members of school Boards
  - possibility for Israel-based seminars for all groups

#### ASSIGNMENTS:

- proposal for the content of pilot projects (Barry)
- 2. design for the introduction of projects into the communities (Barry)

#### III. TO BE DISCUSSED

- A. Role of local communities in the planning of pilot projects
- B. Relationship to work being done by Art Naparstek in funding foundation linkages

### ASSIGNMENTS;

- Proposal for involving local communities
- 2. Arrange meeting with Art Naparstek and Barry (Shulamith)

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#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing Address: 163 Third Avenue #128 •

Phone: (212) 532-1961

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

# TELEFAX

DATE: 12-15-92 FROM: Skilamita Cloter

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To: anite HOckstein

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# COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

## MEMORANDUM

 TO:
 Art Rotman Annette Hochstein
 DATE:
 December 15, 1992

 cc:
 Barry Holtz
 Ester Subject:
 Agenda Item #2: Pilot Projects

### I. WORKING ASSUMPTIONS

- A. Pilot projects are important, in and of themselves, but also for their potential in providing a "jump start" for energizing activity within the local community.
- B. Pilot projects are to be developed around the "enabling options" so as to provide important building blocks for future work in the community in the critical areas of: mobilizing and building community support for Jewish education, personnel and Israel experiences.
- C. Pilot projects also afford an opportunity for the CIJE to establish itself as a critical, important, able and effective resource to the community.

### II. DEVELOPING PILOT PROJECTS

- A. Barry and Seymour met (11/29) to discuss possible pilot projects and the process by which they will be introduced to the Lead Communities.
- B. Barry will assume responsibility for the content of the pilot projects and for the process.
  - 1. Projects are to include both formal and informal education.
  - 2. Initial projects are to be developed around the three enabling options.

To: Art Rotman, Annette Hochstein

Agenda Item #2: Pilot Projects December 15, 1992

- C. Among the projects discussed at the 11/29-30, 12/1 meetings were possible activities in the following areas:
  - 1. in-service training of personnel -- focus on principals, initially
  - 2. seminars for members of school Boards
  - 3. possibility for Israel-based seminars for all groups

#### ASSIGNMENTS:

- 1. proposal for the content of pilot projects (Barry)
- 2. design for the introduction of projects into the communities (Barry)

#### III. TO BE DISCUSSED

- A. Role of local communities in the planning of pilot projects
- B. Relationship to work being done by Art Naparstek in funding foundation linkages

#### ASSIGNMENTS:

- 1. Proposal for involving local communities
- 2. Arrange meeting with Art Naparstek and Barry (Shulamith)

SRE:jl

#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing Address: 163 Third Avenue #128 New York, NY, 10003

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

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

# TELEFAX

DATE: December 15, 1992

FROM: Shulamith Elster

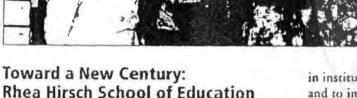
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TO: Annette Hochstein

This article from a recent edition of the HUC-JIR Annual Report will be helpful as we think of the special "contribution" to the Lead Communities Project that can be made by the training institutions.

Also attached the most recent list of Senior Advisors.

# EDUCATION AND JUDAIC STUDIES



#### Sara Lee, Director

During this past year, the Rhea Hirsch School of Education had the opportunity to evaluate its achievements since its founding 20 years ago and to chart its course for the decade ahead. The School and its faculty engaged in a strategic planning process, supported by a grant from the Mandel Associated Foundations of Cleveland, and completed a Master Plan for the Rhea Hirsch School in June, 1992. The mission statement in this plan teaffirms the following goals for the Rhea Hirsch School: to prepare future educational leaders for the expanding field of Jewish education: to enhance the leadership capability of professionals currently in the fit , to stimulate experimentation and contribute to change Sara Lee (back, left), Director, Rhea Hirsch School of Education, with RHSOE faculty and M.A. in Jewish Education recipients (front, from left) Cheryl Seidman, Dr. Isa E. Aron, Tamara Lawson, Carol Hjulberg, (back, from right) Dr. William Cutter, Scott Stineman, and Dr. Michael Zeldin

in institutions in which Reform Jews are educated; and to improve the state of Jewish education and to elevate its status within the North American Jewish community, through research and public discourse. These four goals derive from the belief that Jewish education has a vital role to play in insuring the continuity and vitality of the Jewish people through re-acquainting Jews with their heritage and deepening their knowledge of and commitment to Jewish tradition and texts.

To achieve these goals the Rhea Hirsch School seeks to build upon its achievements of the past two decades and undertake new initiatives in response to the challenges and opportunities presented by emerging trends in the Jewish community and in Jewish education. The current graduate degree programs at both the M.A. and Ph.D. level have contributed greatly to setting a high standar in the preparation of professional leaders for Jewish education. In the next decade professionals will be required to exercise their leadership in diverse educational settings, and the Jewish community will require many more Jewish educators, well educated and prepared to meet new challenges. To this end, the Rhea Hirsch School will expand its curriculum of academic and clinical education to prepare students for a variety of professional paths in Jewish education, while developing strategies to attract more committed individuals to its graduate programs and subsequent careers as professional leaders within Jewish education.

As a graduate professional school the Rhea Hirsch School has always felt a responsibility to work with other arms of the Reform movement to enhance the educational expertise of the movement's professionals. The School has cooperated with the National Association of Temple Educators, the Union of American Hebrew Congregations and the Central Conference of American Rabbis to respond to the needs of professionals in the area of Jewish education. As the instirutions which provide Jewish learning to Reform Jews confront new challenges, and as innovative structures and programs for Jewish learning emerge. the need for continuing professional education in new skills, knowledge and areas of practice is greatly expanded. The Master Plan of the Rhea Hirsch School responds to this need with proposed initiatives in continuing professional development and new opportunities for post-graduate study.

To enable Jewish education to be a vital force is the continuity of the Jewish community and people requires both a deeper understanding of Jewish education as it currently exists, as well as the development of new conceptions of what Jewish education might become. Through research, scholarship and participation in public discourse about issues is Jewish education, the Rhea Hirsch School has estal



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lished itself as a place of both analysis and action, a place where theory and practice unite in the service. of enhancing Jewish education. The papers written and delivered by the faculty, the participation of faculty in major national commissions and committees dealing with Jewish education, and the contribution of the faculty to large-scale inquiries about the state of Jewish education indicate the important role the Schoul plays in adding to public knowledge about Jewish education and in raising critical questions and issues which must be confronted. In the next decade of rapid change, growing complexity, and unique challenges within Jewish life, the Rhea Hirsch School will expand its capacity as a center of research and deliberation about the state of Jewish education and the conditions necessary to improve and enhance the contribution fewish education can make. The goals and program initiatives set forth in the Master Plan of the Rhea Hirsch School have been endorsed by the Mandel Associated Foundations, which awarded a four-year grant in the amount of \$750,000 to the School in June, 1992.

### School of Education, New York

Dr. Kerry M. Olitzky, Director

Jewish education, Talmud Tarah, is understood at the New York School of Education in its widest possible definition. Thus, not only do we offer prugrams in the discipline of Jewish education in the form of an M.A. program, but we also provide a variety of programs and services which transcend the norm. These range from the Miller High School Honors Program (which meets on Sundays), to the Institute of Jewish Studies at Washington Square which is an advanced program of adult studies cosponsored by the Skirball Department of Hebrew and Judaie Studies at New York University. Indepth series on archaeology are programmed each fall and spring. These archaeology programs provide the public a forum for dialogue over recent discoveries in the ancient Near Fast (primarily in Israel), and brings to light the discoveries at the College-Institute's own excavations,

Dr. Kerry M. Olitzky (from left), Director, School of Education, NY, and M.A.R.E. recipients Deborah Wasserman and Nancy Bossov.



The School of Education sees itself martuning non-traditional students and thus offers non-traditional models of education. For example, the M.A. program in religious education is primarily designed. for training people who are already supplementary school principals or who may be making a midcareer change, especially those moving from secular education into the field of Jewish education. It is the only graduate program in Jewish education at the College-Institute that offers students the opportunity to gu to school part time, acknowledging the fact that not all can move directly from undergraduate to graduate school on a full time basis. In the future, we would like to move even beyond this flexible model by offering cluster models of study. throughout the tri-state area so that students con study closer to home and study at the HUC-JIR. campus in periods of intensive summer study.

As part of our efforts in Jewish education, we have worked very closely with the Department of Religious Education of the Union of American Hebrew Congregations. Our work together on behall of the Movement is perhaps the most interesting and exciting of projects over the last few years. COMPASS magazine, the Movement magazine for teachers, is co-sponsored by the Department of Religious Education and the New York School of Education, It has been the vehicle for study seminars in which area teachers and educators are brnight together for workshop training and other programs. This past academic year, two exciting non-traditional seminars were offered by our School with Rabbi Howard Bogot of the UAHC for educators specifically desirous of training in the Steppung Stones Program (for intermatried families) and the Liheyor Program (for special needs learners). Other joint projects include a series of teacher training films and a Torth Tapes Project in which a liberal commentary is offered by leading HUC JIR teach

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#### EDUCATION AND JUDAIC STUDIES

ers on the weekly *Torah* portion. These and other ongoing HUC-JIR/UAHC programs are intrinsic to the vitality and growth of education programs in the Reform Movement.

#### Jerome H. Loucheim School of Judaic Studies

#### Dr. David H. Ellenson, Director

The Jerome H. Louchheim School of Judaic Studies provides undergraduate instruction in Hebrew and Judaic Studies for students at the University of Southern California. Coorses cover a wide range of topics. During the 1991-92 academic year, in addition to four levels of Hebrew language instruction, courses were offered on "Judaism and Christian Beginnings," "Holocaust," "American Jewish Fiction," "Evil, Suffering, and Goodness in the Jewish Tradition," "American Jewish Identity," "Zionism and Israel," "Jews and Their Contribution to the Creation of the Modern West," "Introduction to Jewish History," and "Introduction to Judaism." The latter two courses were subvented by a grant from the Jewish Chatauqua Society of the National Federation of Temple Brotherhoods. Five hundred undergraduate students were enrolled in these courses, making Judaic Studies one of the most popular departments on the USC campus.

In offering these courses at USC, the College-Institute has broadened its mission in Los Angeles to forge a relationship that is virtually unique in the annals of higher education in the United States. It is not uncommon for experts in Judaica to serve as adjunct professors in neighboring institutions. Nor is it unprecedented for universities to allow their students to enroll in courses in adjacent Jewish institutions on a consortium type atrangement. However, HUC-JIR and USC may have the only atrangement in the United States in which a Jewish

Dr. David H. Ellenson, Director, Louchheim School of Judaic Studies, teaching the undergraduate Jewish studies classes attended by more than 500 students of all faiths at neighboring USC.



seminary provides exclusive instruction in Judaica for students at the university.

The Louchheim School is, for all intents and purposes, the Jewish Studies Department of the University of Southern California, Teaching in the School is an integral part of the duties and responbilities of HUC-JIR's Los Angeles faculty member and our faculty serve on a wide variety of USC fac ulty committees and staff a significant number of USC academic programs. In so doing, the College lostitute affirms its commitment to a pluralistic society and sees its origoing mission, in part, as co tributing to the education and character development of Jewish students and undergraduates of a faiths in a highly complex, highly diverse urban setting. Given the prominence and pressige of Us in the city, the nation, and the world, the Louchheim School takes this commitment seriou and sees its task of educating undergraduates at USC as a major part of its goal of serving the Jew people and our country as we embark on the 215 century.

The Louchheim School constantly reevaluat its curricula offerings, and 1991-92 was no exception. The course on "Jews and Their Contributito-the Creation of the Modern West," taught by Professor Norman Mirsky, was developed in response to perceived needs in the undergraduate curriculum of the university. Other courses, suc "Jewish Aesthetics" and "Black-Jewish Relationthe United States," are currently under consideration.

In the meantime, the Fouchheim School cotinues to be a vital part of USC. It constitutes a essential component of the College Institute's rsion in Los Angeles as it strives to fulfill its acae and communal responsibilities to the Jewish peand the Luger community as our nation faces tchallenges of the contemporary world.

#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION SENIOR POLICY ADVISORS (As of 8/10/92)

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Rabbi Joshua Fishman Torah Umesorah 160 Broadway New York, NY 10038 Phone: (212) 227-1000 FAX: (212) 406-6934

Mr. Darrell D. Friedman The Associated: Jewish Charities and Welfare Fund 101 W. Mt. Royal Avenue Baltimore, MD 21201 Phone: (301) 727-4828 FAX: (301) 752-1177

Rabbi Irving Greenberg - ----National Jewish Center for Learning and Leadership 99 Park Avenue New York, NY 10016 Phone: (212) 279-2525 FAX: (212) 465-8425

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Mr. Gene Greenzweig Central Agency for Jewish Education 4200 Biscayne Boulevard Miami, FL 33137 Phone: (305) 576-4030 FAX: (305) 576-0307

Rabbi Robert Hirt () -Yeshiva University 500 West 185th Street New York, NY 10033 Phone: (212) 960-5263 FAX: (212) 960-5228

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Mr. Richard Joel B'nai B'rith Hillel Foundation 1640 Rhode Island Ave., NW Washington, DC 20036 Phone: (202) 857-6560 FAX: (202) 857-6693

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Mr. Martin Kraar Council of Jewish Federations 730 Broadway New York, NY 10003 Phone: (212) 598-3505 FAX: (212) 529-5842

Ms. Sara Lee Rhea Hirsch School of Education Hebrew Union College 3077 Universtiy Avenue Los Angeles, CA 90007-3796 Phone: (213) 749-3424 FAX: (213) 747-6128 Dr. Daniel Pekarsky Cleveland College of Jewish Studies 26500 Shaker Boulevard Beachwood, OH 44122 Phone: (216) 464-4050 FAX: (216) 464-5827

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Fax Memorandum

TO: AI	nette Hochstein 011-9724619951	
FROM:	Shulamith Elster/ CIJE   .	
DATE:	December 14, 1992 0	•
RE:	ETC	

1. I have not been sending Shmuel duplicate copies of the various materials sent to you assuming that you will pass along the information that he needs to proceeed with his aspect of the work.

2. Later today Judy will fax you the second of the agenda items - Pilot Projects. 5' is attending a class today and when she returns it will come your way.

5. I meet with Barry in a few hours to continue our work on Best Practices and to begin our work together on the pilot projects. When we speak in the morning, I will report to you.

4. Jim Meier and I will be meeting tomorrow afternoon to begin work on the materials that you want UAI to produce. If you have any specific guidance on the matter that you would like me to convey, please either send a fax to arrive in the morning or let us include it in our conversation in the morning.

5. I've not spoken to Art since his trip to Baltimore on Friday but I am very interested in hearing about it.

6. Regarding the local commissions, I will phone today to get status reports from Atlanta and also from Milwaukee (assuming that Art has the latest from Baltimore). I am also awaiting word from Milwaukee as to the results of the meetings of the Bader Foundation and the request for funding for the CIJE/ Lead Communities position in Milwaukee.

BL . regards.

cc: Arthur Rotman

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### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

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

#### MEMORANDUM

TO: Art Rotman Annette Hochstein DATE: [

December 11, 1992

cc: Barry Holtz Shmuel Wygoda

FROM: Shulamith Elster SUBJECT: December Workplan

In our most recent meetings, Annette and I developed a ten point agenda for our work on the Lead Communities Project.

These items are as follows:

- 1. Local commissions
- 2. Design of pilot projects
- 3. Best Practices
- 4. Monitoring, Evaluation and Feedback
- 5. Materials
- 6. Communications and Networking
- Survey of educators in communities
- 8. Goals project
- 9. The CIJE
- 10. How to introduce ideas into the Lead Communities

My plan is to develop individual memoranda on these topics which will serve as the basis for our ongoing work. Since they were prioritized during the 11/30 and 12/1 meetings, they will be developed in the order noted above.

Through the copies of these outlines to Shmuel and Barry, I can keep all of "our team" informed. Comments and suggestions are always most welcome.

A memorandum on the Local Commissions follows very shortly. I would like for Local Commissions to be the main item on the agenda for the telecon now scheduled for Tuesday, December 15, at 8:30 A.M.

#### <u>Annette</u>:

May I assume that the telecon is going to take place "as scheduled" and that you will place the call to me at 212-532-196l. If this is not the case, please let me know early in the day on Monday. I have a meeting with Barry at 3 P.M. and we will discuss #2 Pilot Projects and #3 Best Practices.

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### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

	MEN	10 co.	rand fax transmittal i	Co. Skulemith
TO:	Art Rotman Annette Hochstein	Fax#		Phone #
FROM:	Shulamith Elster	SUBJECT:	For Discussic Agenda Item Local Commi	#1:

#### I. UNDERLYING ASSUMPTIONS

- A. The CIJE should provide a framework for the work of the local commissions in the Lead Communities.
- B. Local commissions are particularly of concern, for decision-making on the community level will rest with this group.
- C. The composition of the local commission will include top communal lay leadership, rabbis and educators.
- D. The CIJE can benefit from the experience of communities that have had successful local commission experiences.
- E. Atlanta, Baltimore and Milwaukee have each had experience to date with local planning commissions. The Lead Communities Project should build on this experience.

#### ASSIGNMENTS:

Preparation of framework for the work of the local commissions (to be determined)

· Report on Cleveland experience (Shulamith)

#### 11. STATUS REPORT: ATLANTA, BALTIMORE AND MILWAUKEE

- A. What is the current status of the community's effort to develop local commissions?
  - 1. How can the local commissions best be organized?
  - 2. What role can/should CIJE play?
- B. 1. Who has been recruited to lead the effort?
  - 2. Who has been appointed to the commissions to date?
  - 3. Do these individuals represent top lay and professional leadership?
  - 4. What role can CIJE lay leadership play in recruiting local leadership?
  - 5. How will this be accomplished?
- C. What knowledge do members have about the Lead Communities concept? How has this been communicated?
- D. What plans are in place for presentations on the concept to the commission members?

#### **ASSIGNMENTS:**

- Preparation of status report for each of the communities (Shulamith)
  - a. report from Art from trips to the communities
  - b. interviews with planners.
- Plan for local presentations (Shulamith)

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#### TELEFAX

To: Annette Hochstein Date: December 10, 1992

From: Arthur Rotman FAX #: 011 972 2 619 951

Number of pages (including this sheet) \_\_\_\_\_

MESSAGE:

I will need to meet with you during the time I am in Israel. Please call so we can schedule.

Your memos of December 7 on my visits to the communities and Jack Ukeles assignments are very helpful.

In a letter dated December 7, you provided background material on the forthcoming meetings in Israel. You indicated this schedule would be available "on arrival." It is much too late for me as I must spend time doing other things as well. Please let me know what you have in mind for the schedule so that I can make plans accordingly. Also, please provide Don Scher, at our office, with a copy as well.

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## COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address 163 Third Avenue #128 • New York, NY 10003 Phone (212) 532-1961

FAX: (212) 213-4078

#### MEMORANDUM

December 10, 1992 DATE: Art Rotman TO: cc: Annette Hochstein 🖌 Barry Holtz FROM: Shulamith Elster SUBJECT: Baltimore Briefing #2 The Reasons Why!

To review:

#### Lay Leadership

- Experienced
- Agencies and groups have all been involved in the strategic planning process for the community led by the Associated

#### Professional Leadership

- Federation executive and senior staff are outstanding.
- Friedman and Bernstein are an exemplary "outside-inside" team
- Planning staff for Lead Communities Project includes three educators -Levin, Kutler and Botwinick. All have backgrounds and experience in both community planning and education, in a variety of settings.

#### Quality and extent of Jewish education network

- There is a wide variety of schools denominations (within the denominations), approaches, settings and sponsorship
- There is a strong, informal education network Jewish Family Service, Pearlstone Family Life Institute, JCC
- Local Jewish university in transition but with potential
- Solid central agency staffed to serve needs of institutions
- Potential for training in collaboration with other institutions

#### **Financial Resources**

- Record of support for education
- Specific foundation support: Hirschhorn and Blaustein, and other family foundations - Meyerhoff and Kreiger

#### Financial Prospects

- From memo of August 24, 1992 from Darrell Friedman to Charles Bronfman

"The Weinberg Foundation has put forth an offer of a \$10 million challenge grant to be used for Jewish education. Of the \$20 million available if the grant is matched, 50% is to be used for formal classroom day school education. The federation is insisting that the other 50%, based on strategic planning for Jewish education, be used for purposes such as informal Jewish education, Israel programs, and the other types of community education activities outside the formal classroom setting."

#### Status of Local Commission

 A separate group is to be formed as a sub-group of the existing Commission to guide the Lead Communities project. The present commission has, in their words, "engaged and incorporated multiple providers (stakeholders) of Jewish education, both formal and informal in all its deliberations". LeRoy Hoffberger will chair the local commission.

#### Attachments:

Fiscal Year 1993 Allocation to Jewish Education 2/92: Strategic Planning for Jewish Education

6/1/92: nd

#### Mandel Institute

Tel. 972-2-617 418; 618 728

Fax: 972-2-619 951

#### **Facsimile Transmission**

To:	Art Rotman	Date: November 6, 1992
From:	Annette Hochstein	No. Pages:3
<sup>:</sup> ax Nuπ	nber:	

Dear Art,

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

1. The letter of understanding:

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

2. Upcoming staff meeting

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

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

- a. Introduce lead community idea into the community
- b. Prepare plans including:
  - 1. Educational self assessment
  - 2. Lead Community plan (5-year plan)

c. Year 1 workplan - including:

1. Introduce monitoring, evaluation, feedback project and set up feedback process

2. Implementation of several projects in each of the key areas of endeavor (personnel, community)

3. Launch vision/goals project with particular reference to Monitoring Evaluation and Feedback project.

4. Learning best practices

Here is a very brief elaboration on each:

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

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

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

2. Preparation of a five-year plan. This would be the outcome of the work of the local mechanism, whatever its form (committee, commission, subgroups, planner, etc..); together with the joint CIJE-Lead Community seminar. It would include all the elements of plan from the definition of needs and targets, through the implementation plan. c. Year-1 workplan.

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

\* \* \* \* \* \* \*

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

Annette Best regards

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION         Mailing address:       163 Third Avenue #128         Phone:       (212) 532-1961					
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TO:	Art Rotman cc: Annette Hochstein Barry Holtz	DATE:	December 10, 1992		
FROM:	Shulamith R. Elster	SUBJECT:	Baltimore Briefing #1 Lay and Professional Leadership		

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As you prepare for your visit to Baltimore, I thought it would be helpful for you to have the names of the individuals with whom we have already been in contact regarding the Lead Communities Project.

#### I. Lay Leadership

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Individuals with whom we met during the site visit and since August 1992.

Alfred I. Coplan LeRoy Hoffberger David Hirschhorn	Chairman of the Board of the Associated Chairman, Commission on Jewish Education Member, Baltimore's Commission on Jewish Education, Commission on Jewish Education in North America and CIJE Board and Lead Communities Committee
Alvin D. Katz	Chairman, Community Planning and Budgeting
Richard Lansburgh	First Vice Chairman of the Board (will follow Coplan and be next Chairman)
Richard Manekin	Chairman, Subcommittee on Jewish Day School Education
Morton J. Macks	Chairman, Joint Commission on Synagogue/ Associated Relations
Ilene C. Vogelstein	President, Board of Jewish Education and Chairman, Subcommittee on Congregational School Education

II. Membership of Commission on Jewish Education of the Associated (pre-Lead Communities Project)

#### MEMBERS AT LARGE

LeRoy Hoffberger, Chairman \* Rosalee Davison Jonathan M. Genn Dr. Leonard Golombek Rabbi Floyd Herman David Hirschhorn\* Judy Hoffberger Dean Laurence Katz Roger Lipitz Richard Manekin \* Rabbi Herman Neuberger\* Jeffrey Picker Frederica K. Saxon Harry D. Shapiro Eve Steinberg Hannah Storch Jack Tucker Peggy Wolf Rabbi Joel Zaiman

#### AGENCY DELEGATES

Rabbi Donald Berlin - Synagogue Council William H. Engelman - Baltimore Jewish Council Allan J. Gibber - Council on Jewish Day School Education Louis J. Glick - Synagogue Council Florene Goldner - Council on Jewish Day School Education Alice Levin - Jewish Community Center Miriam Lowenberg - Jewish Historical Society Searle E. Mitnick - Board of Jewish Education Beverly Penn - Baltimore Hebrew University Ben Schuster - Baltimore Hebrew University Joan Sobkov - Jewish Family Services Ilene Vogelstein - Board of Jewish Education \*

#### EX-OFFICIO

Alfred I. Coplan - Chairman of the Board \* Michael Hettleman - Chairman, Strategic Planning Implementation Council Samuel K. Himmelrich - Chairman, Endowment Fund Board of Governors, 1989 - 1991 Alvin D. Katz - Chairman, Community Planning and Budgeting \* Richard Lansburgh - Vice Chairman, Community Planning and Budgeting \*

#### PROFESSIONAL STAFF

Darrell D. Friedman, President William S. Bernstein, Senior Vice President Marshall S. Levin, Director, Community Planning and Budgeting Nancy R. Kutler, Associate Director, Community Planning and Budgeting Dr. Chaim Y. Botwinick, Executive Director, Board of Jewish Education

\*has participated in CIJE Lead Communities meetings

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III. Educational Leadership (Reform-Conservative-Orthodox, formal and informal education, pre school through adult)

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Dr. Chaim Y. Botwinick	Executive Director, BJE
Rabbi Joseph Braver	BJE Director of Human Resources
	and Professional Development
Barbara Cohen	Judaic Head Teacher, Solomon Schechter Day School
Rabbi Heshy Dachs	Principal, Talmudical Academy
Elayne Fedder	Assistant Executive Director, JCC
Dr. Norma Furst	Interim President, Baltimore Hebrew University
Rachel Glazer	Principal, Beth Israel Religious School (Conservative)
Judy Grossman	Director, Early Childhood, JCC
Judy Meltzer	Dean-Undergraduate & Continuing Education, Baltimore Hebrew University
Rabbi Herman Neuberger	President, Ner Israel Rabbinical College
Roberta Orman	Co-chair-Principal's Association and Director of Religious Education of Reform Congregation Ohev Shalom
Carol Pristoop	Director, Jack Pearlstone Institute for Living Judaism
Zipora Schorr	Director of Education, Beth Tfiloh Community School (Orthodox)
Rabbi Stuart Seltzer	Principal, Chizuk Amuno Religious School (Conservative)
Dr. Lucy Y. Steinitz	Executive Director, Jewish Family Services

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#### MEMORANDUM

TO:	Art Rotman cc: Annette Hochstein ¥ Barry Holtz	DATE:	December 10, 1992
FROM:	Shulamith Elster	SUBJECT:	Baltimore Briefing #2 The Reasons Why!

review:

#### Lay Leadership

- Experienced
- Agencies and groups have all been involved in the strategic planning process for the community led by the Associated

#### Professional Leadership

- Federation executive and senior staff are outstanding
- Friedman and Bernstein are an exemplary "outside-inside" team
- Planning staff for Lead Communities Project includes three educators -Levin, Kutler and Botwinick. All have backgrounds and experience in both community planning and education, in a variety of settings.

#### Juality and extent of Jewish education network

- There is a wide variety of schools denominations (within the denominations), approaches, settings and sponsorship
- There is a strong, informal education network Jewish Family Service, Pearlstone Family Life Institute, JCC
- Local Jewish university in transition but with potential
- Solid central agency staffed to serve needs of institutions
- Potential for training in collaboration with other institutions

#### nancial Resources

- Record of support for education
- Specific foundation support: Hirschhorn and Blaustein, and other family foundations - Meyerhoff and Kreiger

#### Financial Prospects

- From memo of August 24, 1992 from Darrell Friedman to Charles Bronfman

"The Weinberg Foundation has put forth an offer of a \$10 million challenge grant to be used for Jewish education. Of the \$20 million available if the grant is matched, 50% is to be used for formal classroom day school education. The federation is insisting that the other 50%, based on strategic planning for Jewish education, be used for purposes such as informal Jewish education, Israel programs, and the other types of community education activities outside the formal classroom setting."

#### Status of Local Commission

 A separate group is to be formed as a sub-group of the existing Commission to guide the Lead Communities project. The prosont commission has, in their words, "engaged and incorporated multiple providers (stakeholders) of Jewish education, both formal and informal in all its deliberations". LeRoy Hoffberger will chair the local commission.

#### Attachments:

Fiscal Year 1993 Allocation to Jewish Education 2/92: Strategic Planning for Jewish Education

Poge Beitimer

STRATEGIC PLANNING FOR JEWISH EDUCATION

Priority Recommendations from the Subcommittees on:

- Congregation and Communal Religious School Education
  - Jewish Day School Education
- Informal Jewish Education

Approved by the Commission on Jewish Education, 2/3/92

#### KEY FOR INTERPRETING ATTACHED LIST OF RECOMMENDATIONS

- All of the recommendations are listed in priority order within their core area (Personnel, Programs/Initiatives, Special Populations) as ranked by members of the Commission on February 3, 1992. Two items sharing the same ranking indicates that they both received the same number of votes.
- Before each recommendation, you will note either 1, 2, or 3 asterisks. These asterisks indicate the following:
  - denotes a recommendation which appeared in one of the subcommittee reports to the Commission.
  - \*\* denotes a recommendation which appeared in 2 subcommittee reports.
  - \*\*\* denotes a recommendation which appeared in 3
     subcommittee reports.
- In the case of recommendations which appeared in more than one report, the original language has been modified to create a single integrated recommendation.
- A series of code letters appear in parenthesis after each recommendation. These letters are abbreviations for the constituencies which are impacted by that particular recommendation. The letters represent the following:

EC		Early Childhood
С	-	Children
Adol	≓	Adolescents
CAY	-	College Age Youth
λ	Ξ	Adults
F	=	Families
ALL	=	All of the above constituencies

oa/ personnel

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\*\*\* 1. Increase teacher <u>salaries</u> and enhance <u>benefits</u>. New salary standards should be established by upgrading salaries for existing personnel and ensuring appropriate salary levels for newly created positions. (EC, C, Adol, A, F)

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- \*\*\* 2. Develop and utilize <u>professional growth</u> opportunities for <u>in-service training</u> of both teachers and principals via classes, credit courses,workshops, seminars, and educational experiences on the local, national and international level. (EC, C, Adol, A, F)
- \*\*\* 2. Develop and establish an intensive <u>recruitment</u> program to identify potential teachers/educators and monitor and assist them with their educational training and ultimate <u>placement</u> within a school. (EC, C, Adol, A, F)
  - \* a) Use the BJE in assisting the schools in identifying and recruiting teachers in <u>specialty</u> <u>areas</u> such as art education, music education, family education, remediation as well as specific curriculum areas. (EC, C, Adol, F)
- \*\* 3. Provide teachers/educators with <u>incentive grants</u> in order to encourage and reward excellence. (EC, C, Adol)
  - Create more <u>full-time teaching positions</u> in order to make the field of Jewish education a primary vocational focus, rather than a supplementary position to other jobs in the community. (EC, C, Adol)
- 4. Enhance community <u>recognition</u> of teachers to express esteem and to elevate the status of teachers in the community. (EC, C, Adol)
- 5. Examine the personnel impact of the structure and funding guidelines of <u>Synagogue Council and Joint</u> <u>Commission</u> programs in order to determine whether these two programs meet the current needs of the Jewish educational community. (EC, C, Adol)
- Envestigate the feasibility of establishing a community or school-based <u>day care</u> program for children of teachers. (EC, C, Adol)
- 7. Provide more intensive educational <u>consultation</u> services to teachers and pupils. (EC, C, Adol)

PERSONNEL-NK-TW

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- \*\* 1. Assist in making possible an <u>experience in Israel</u> for members of the Baltimore Jewish community. This should include the development and funding of pre-and post-trip educational programs, maximizing the Jewish identity-affirming impact of the experience in Israel. (Adol, CAY, A, F)
  - a) Develop an endowment fund to support educational experiences in <u>Israel for Secondary Education</u> students. (Adol)
- \*\* 1. Develop a <u>comprehensive outreach</u> campaign to extend to a wider segment of our community. New creative approaches must be identified to address the Jewish needs of the vast numbers of Jews who are marginally affiliated with or are not participating in existing Jewish institutions and their programs. Specific constituencies targeted for outreach should be school age children not currently enrolled in a Jewish school and unaffiliated college youth. (ALL)
- Commit funds on a <u>multi-year basis</u> in order to ensure the long-term viability of programs. (ALL)
- Increase staff and program resources on <u>college campuses</u> in the Baltimore area in a coordinated and unified manner. (CAY)
- \*\* 4. Provide <u>consultative services</u> from THE ASSOCIATED to the schools in financial resource development to assist in areas of capital needs, endowment development, fiscal planning and grantmaking. (ALL)
- S. Continue to provide financial support for the <u>day schools'</u> <u>operating needs</u>. (C, Adol)
- 6. Encourage <u>interagency collaborative</u> projects, with synagogues participating as full partners, especially in community-wide events. (ALL)
- \* 7. Implement effective models for <u>family education</u>. (F)

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- \* 8. Increase the number of hours of the BJE Resource Center to provide more intensive educational consultation services to teachers and pupils. (EC, C, Adol)
- \* 9. Establish <u>an informational resource</u> whose role would be to take responsibility for: (ALL)
  - a) Identifying gaps in our existing education system and advocating for the development of new programs;
  - b) Serving as a community resource for available programs/services, and enhancing the Jewish component of programs; and

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- c) Identifying opportunities for interagency collaboration on programming and reducing possible redundancies.
- Utilize marketing resources of THE ASSOCIATED to determine the desired needs of various population groups and to inform people about available programs. (ALL)
- 10. Increase <u>capitation grants to the day schools</u> based upon the number of students enrolled in the day schools. (C, Adol)
- \* 11. Expand <u>BJE Resource Center materials</u> to include a greater variety of educational resource material as well as a resource bank of personnel in specialized areas. (EC, C, Adol)
- Provide schools with <u>ongoing information and data</u> regarding effective educational models which have the potential for replication in school setting. (EC, C, Adol)
- \* 13. Investigate feasibility for providing students with a community-wide school <u>transportation system</u>. (C, Adol)
- 13. Develop <u>recognition/incentives</u> to stimulate academic excellence of students. (C, Adol)
- Provide more intensive guidance and assistance to schools in the areas of program planning and development by the BJE. (EC, C, Adol)
- \* 14. Ensure the <u>transition</u> of pupils from preschool programs to elementary school. (EC, C)
- \* 14. Assist principals in developing measures of accountability for their congregational schools. (EC, C, Adol)
- \* 15. Offer new ventures and experiments in <u>adult education</u>. (A)
- 15. Focus BJE's <u>curriculum service program</u> on the specific needs of each congregational school via assigned BJE consultants. (EC, C, Adol)
- 15. Explore various educational <u>formats and methodology</u> in order to successfully implement the goals and objectives suggested in the Report of Subcommittee on Congregational and Communal Religious School Education. (EC, C, Adol)
- 15. Provide ongoing <u>analysis</u> of congregational school-based educational needs. (EC, C, Adol)
- \* 16. Organize, market, and coordinate all programs for singles. (CAY,  $\lambda$ )
- 16. Assist schools in the critical areas of experiential and informal Jewish educational programming. (EC, C, Adol)
- 17. Provide schools with more source material relevant to their individual <u>curricular needs</u> through a BJE consultant. (EC, C, Adol)

INITIATIVES-NK-TW

#### SPECIAL POPULATIONS

- \*\*\* 1. Increase <u>scholarship and loan funds</u> available, enabling students from families with limited financial resources and/or new immigrant families and/or families with multiple children to experience Jewish education programs of their choice (e.g. day schools, congregational schools, higher Jewish education, Israel experience). (F)
- \*\* 2. Meet needs of children with <u>special educational</u> <u>needs</u> by: (EC,C,Adol)
  - a) enhancing the quality and scope of services;
  - b) strengthening community advocacy for special learning needs; and
  - encouraging interschool sharing of information and coordination of programs.
- Increase funding for <u>immigrant support services</u> such as ESL classes and other tutorial programs. (C,Adol)

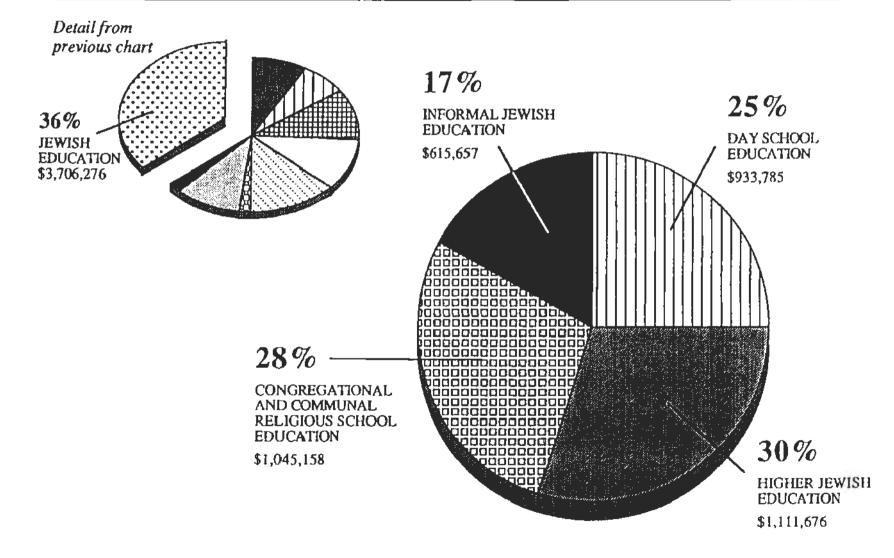
**SPECIALPOPULATIONSNK** 

### STRATEGIC PLAN FOR JEWISH EDUCATION

#### CONCEPTUAL FRAMEWORK

	PERSONNEL	EDUCATIONAL PROGRAMS/ INITIATIVES	SPECIAL POPULATIONS
EARLY CHILDHOOD			
CHILDREN			
ADOLESCENTS			
COLLEGE-AGE YOUTH			
ADULTS			
FAMILIES			

# FY 93 ALLOCATION TO JEWISH EDUCATION



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	MEM	OFi			
TO:	Art Rotman Annette Hochstein Barry Holtz	DAT	E:	December 9, 19	92
FROM:	Shulamith Elster	SUE	BJECT:	Jack Bieler/Seni	or Advisors

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As part of my ongoing effort to keep the CIJE advisors and colleagues in the field abreast of developments in our work, I met last Friday atternoon with Jack Bieler.

As you will recall, Jack was a member of the Commission and has been an active participant in the meetings of the Senior (Policy) Advisors of the CIJE. Jack is on the administrative staff of the Hebrew Academy in Washington with specific responsibilities for the high school curriculum. His professional activities include writing for T'en Da'at, a publication that reaches the "modern" Orthodox day school educators. Unfortunately, no more funding is available for this publication - a real loss for this educator community.

I briefed Jack on the current status of our work, particularly on the Lead Communities and Best Practices and Monitoring, Evaluation and Feedback Projects, and on the Educated Jew Project and its relationship to the goals project in the Lead Communities.

He had some comments that I think are of special interest.

- 1. He wants to stay actively involved with the work of the CIJE as an advisor and as one of the "small group" of advisors that we are now developing. He sees a role in the Best Practices Project, especially the oay school division. I will speak personally to Barry about how to best use him as a resource.
- 2. When we spoke about the model of "self-nomination" for the day school division of Best Practices, Jack noted that both this and the "goals" project will suffer because of the fact that we have not devoted sufficient attention to training teachers and educators to be reflective practitioners for example, will educators really know what they have that is worthy of export to other day schools? Do educators know how to analyze their own work well enough to make the type of contribution to our project that would be beneficial to other settings?

Jack feels that we ought to undertake an effort (similar to a Melton Retreat Program) to train reflective practitioners and this within the context of the Best Practices Project.

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Page 2

Jack is working on a piece (inspired in part by Sara Lee's introduction of David Schoen's work) on reflective practice in Jewish education. Alas, there will be no T'en Da'at publication - again, lack of funding - to bring this work to an audience that needs it!

#### For CIJE Agenda:

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- 1. Conversation with Jack and Barry regarding Best Practices in day schools.
- 2. Consideration of in-service for educators in day schools on reflective practice so as to enhance the day school component of the Best Practices Project. Can Melton do this for us? Can it include educators from the three Lead Communities as well as others from the broader field?
- 3. Can we help T'en Da'at find funding? Pressure YU (through MAF leverage) to find some money for this educational publication?
- 4. How to use Jack in the Lead Communities -- the Educated Jew project and the goals extension, in-service for educators, community lectures?

I welcome your reactions and responses.

SRE:jl

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		fress: 163 Third		New York	EDUCATION NY 10003 2) 213-4078				
	MEMORANDUM								
	TO:	Art Rotman		DATE:	December 9, 1992				
	FROM:	Shulamith E	Elster	SUBJECT:	Foundations and the Lead Communities				

As I reflect further on our November meetings, I think it important to begin a discussion of how to best communicate and work with the communities regarding the various projects that Art has undertaken and now has on the "drawing board".

While I fully understand and well appreciate the necessity of obtaining funding to support the core CIJE budget and advance the cause of scholarship and research, it is important that our role as "broker-facilitator" - as outlined in <u>A Time to Act</u> and in the discussions with the communities -- come alive.

I'm hopeful that we can think along the following lines:

- 1. Art Naparstek to communicate with the planners in each of the three communities to bring them up-to-date and to schedule a visit to communities for meetings with staff, with chairs of the local commissions and with a small working group.
- 2. The purpose of these meetings would be to acquaint Art with the local scene, the local foundation world and local priorities.
- 3. The benefits to both the CIJE and the communities are several beyond public relations. The local communities have good ideas, some contacts in the foundation world (local and outside) and these conversations may also result in the development of projects (pilot project as in Barry's work) or others that could involve all three communities.

I plan to be in Cleveland for other work on January 14th and plan to meet with Art. If we have an idea about how you would like to proceed, we can use some of that time to plan for these local meetings.

#### cc: Annette Hochstein Art Naparstek

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#### MEMORANDUM

TO:	Art Rotman	DATE:	December 9, 1992
FROM:	Shulamith Elster	SUBJECT:	BALTIMORE

As you prepare for your visit to Baltimore, I want to review the contacts that I have had with the community since its selection as a Lead Community at the end of August.

- Planning meeting with Marshall, Nancy and Chaim regarding "conceptions of the lead community" - our image of how the community will need to mobilize and gear up for the challenge now posed by CIJE.
- Meeting to introduce Julie as our field researcher and for Julie to introduce the Monitoring, Evaluation and Feedback Project. This meeting included Marshall, Nancy and Chaim as the "point people" for the community.
- Meeting with Jack to discuss the then Letter of Understanding and its elements. Bill Bernstein participated in this meeting with Marshall and Chaim and Darrell dropped into the discussion for a time.
- 4. I attended an Institute sponsored by the Board of Jewish Education on the topic of "Visions of Jewish Education". The Lead Community project was noted, I was recognized and David Hirschhorn attended the session. Five supplementary school principals made <u>outstanding</u> presentations.
- 5. I have been invited to brief the Board of Jewish Education on the Lead Communities Project at its December 17th meeting. Eileen Vøgelstein (who just happens to be Shoshana Cardin's daughter) is the Chairman of the Board. I will also lead the Board's study session at a dinner that precedes the meeting...after all, teaching is "where it's at".

As an aside, Dr. Norma Furst, the acting president of the Baltimore Hebrew University, is a long-time colleague, and I met with her - on another occasion - to try to ascertain if the BHU had resources that we could use as a part of our effort. On the same trip to Baltimore, I met with Chaim at the BJE to better understand the strengths of the central agency as a part of my own inventory of local assets.

I hope that this is helpful. Is there anything I can do in advance of your trip at the end of the week?

cc: Annette Hochstein 1

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a collaborative effort of The CRB Joundation, CJJ, 9CCA, 9ESNA, and UJA

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#### AGENDA MANAGEMENT GROUP MEETING 11:00 A.M. to 1:00 P.M.

- 1. Conclusive Selection of Pilot Communities
- 2. Challenge Grants: criteria and amounts Discussion and approval of Brian and Vicki's proposal
- 3. Staffing structure and assignments
- 4. Evaluation mechanism
- 5. Setting of additional meetings

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### Proposed Operational Plan (as of Wed. 12.2.92)

#### December, 1992:

Meeting of Consortium staff to plan agenda for community visits (December 15, 9am- 2pm). Evaluation methodology will be part of this discussion, with participation from Mr. Murray Glow of A.R.A. Consultants, Toronto, Ontario who has advised CRBF on several important evaluation projects in the past.

Meeting will to be scheduled towards the end of December of Advisory Committee made up of representatives of AZYF and members of the NAJYD Association.

#### January ,1993;

Visit to community (two days) by 2-3 member team. Visit is preceded by receipt of key community data supplied by local Federation. Community is asked to schedule meetings over the two day period with all individuals, committees, agencies whom they feel are essential to the successful mobilization of community. Agenda for those meetings is open-ended, fact-finding in nature, with goal of accumulating as much data on local community as possible. Our goal is a diagnostic one: to determine the strengths and weaknesses of the local apparatus with the goal of returning with a proposed agenda leading towards an operational plan for that community.

#### February, 1993:

Staff of Consortium holds several meetings with advisors (information/experience sources) from consortium members' appropriate staffs to piece together plan for the individual communities. This will be done for all four communities at the same time, thus allowing for efficient scheduling of staff visits, timing of development of materials, etc., financial planning consultation, feasibility studies of new local program initiatives, etc.

#### March, 1993:

CRBF annual conference to which pilot projects will have been asked to send 5-6 representatives. An afternoon orientation session is planned for these people to meet each other and gain a broader perspective of the continental project.

Return 2-3 day visit from team assigned to community. General presentation of recommendations. Recommendations are not final directive. They are agenda setting in nature and begin a local process of focussed discussion and planning.

a collaborative effort of The CRB Joundation, CJJ, JCCA, JESNA, and MJA

**April-June, 1993:** Local communities schedule monthly meetings of Israel Experience Committee to which a Consortium staff member is available if needed. The period includes telephone conference time and much "hand-holding". Visits may be necessary by Management execs for fund-raising purposes and other leadership purposes.

Management group will meet monthly.

Staff group will meet every 2-3 weeks, or more often, as needed.

#### Consortium suitcase:

1. Consultation services (scheduled through PG's office in NY) are available from the following staff members:

Vicki Agron	Mark Charendoff
Norbert Fruehauf	Barry Chazan
Len Rubin	Peter Geffen
Leora Issacs or Art Vernon	Irwin Kula
	Jay Levenberg
	John Ruskay

In addition, Brian Lurie has indicated his willingness to attend both events and meetings in pilot communities. It is suggested that other management execs do so as well. Personal involvement and participation of Charles and Andy Bronfman will also be most helpful to the task of motivating local leadership.

2. Topics include (but are not limited to):

New Trip Development Financial Planning: Savings Plans, scholarship endowment development, Bar Mitzvah Registry Local marketing studies Advertising/Publicity approaches Educational material development Promotional Video: maximizing usage, preferred settings, follow-up

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#### Staff Training

Evaluation and Research Program modules in Israel: identification, use, funding Placing the Israel Experience in the context of Jewish education Development of comprehensive pre and post programs Philosophical issues related to the place of Israel in NA Jewish life. Field visits to groups programs in Israel

3. Video is being completed for local community use. Exploration of recruitment video for parents and for teens is in process.

4. Proposal has been solicited from Comet International (Lewis Bernstein, President) for provision of a portion of marketing services and production of educational materials (video, interactive video, etc.)

5. Program for continental Savings Plan program is being presented to CRBF for final approvals. This program would be administered by Bank Leumi, thereby eliminating the enormous staff drain on smaller local communities in establishing incentive plans.

6. Marketing experience from the first and second years of the Joint Authority/CRBF marketing Initiative is being collected and prepared for use by the pilot communities.

7. Winnipeg will make its program available as a resource.

8. Bar/Bat Mitzvah registry programs currently being developed should be ready for pilot communities trials by June 1992. These represent important potential of inclusion of new, outside capital to the funding process.

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#### Staff Deployment:

Each community will have a basic team of 3-5 who will work with that community through the three year period. Each team will have one coordinator who will work more closely with Peter as well as serve as the contact person for the community staff and lay people. Not more than 3 people would comprise an individual visitation team.

One model for the initial communities is: (\* indicates coordinator)

Atlanta	New York	Palm Beach	Toronto
Barry Chazan	Vicki Agron*	John Ruskay*	Mark Charendoff
Mark Charendoff*	Irwin Kula	Barry Chazan	Art Vernon
Len Rubin	Barry Chazan	Vicki Agren	Irwin Kula*
Peter Geffen	Peter Geffen	Peter Geffen	Peter Geffen
Norbert Fruehauf	Mark Charendoff	Irwin Kula	John Ruskay

Jay Levenberg will be brought in for marketing seminars and consultations as needed. CRBF will be funding Jay's services.

#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 New York, NY 10003

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## MEMORANDUM

To: The File Date: December 2, 1992

Shulamith R. Elster From:

Subject: Notes from meeting with Seymour Fox, Annette Hochstein, Art Rotman and Barry Holtz, December 1, 1992

#### 1. Pilot Projects

- A. Enabling options
  - 1. AH: Details of in-service training of personnel have to be worked out 2. AR: Would there be pilot projects in each of the Best Practices areas?
- B. Integration of formal and informal education
- C. Staffing of local seminars in enabling options
  - 1. Academic coordinators: BH & SE
  - 2. Possible local or national presenters
  - 3. Composition of local groups
  - 4. Early '93: Proposal
  - 5. September '93: Implementation of plan based on work with principals
  - 6. Summer '93: Israel seminar (?)
    - a. Participants
      - Local people from the Commissions
      - 2. Educators
    - b. Content
      - 1. Specific to groups above
      - 2. Israel experience

- D. Refer to chart from AH's presentation re: 4-6 pilot projects
  - 1. New hires talented new people for community
  - 2. Two from the list for implementation
- E. Community Mobilization
  - Curriculum for lay leadership in Jewish education

     CLAL, JESNA, denominations
  - 2. Rabbis discrete group
  - 3. Communal workers federations
  - 4. Public community forum
    - a. Scholars from The Educated Jewish Project
    - b. BH on Best Practices
- II. Reflections on SF meeting with BH (Barry Holtz)
  - A. Need to work on:
    - 1. Level of understanding in community about what LC means
    - 2. Individual approaches
      - a. Staffing CIJE staff, others
    - 3. "Gatekeeping" by federation staff
      - a. Remains an issue in access
      - b. Strategies for introduction
- III. Seminars in Israel/Harvard
  - A. "Educated Jew" lay and professional
  - B. Training re: goals

#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 New York, NY 10003 Phone: (212) 532-1961

FAX: (212) 213-4078

## MEMORANDUM

TO: Shulamith Elster DATE: December 2, 1992

> CC: Annette Hochstein

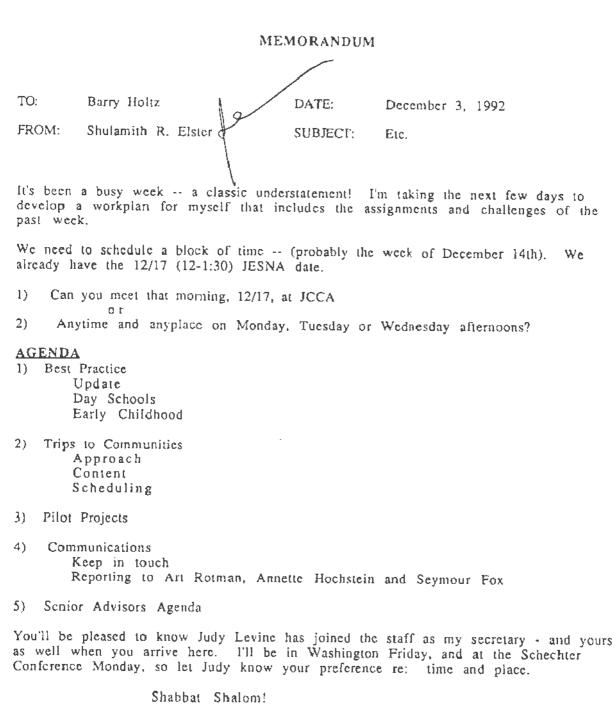
FROM: Art Rotman SUBJECT: Senior Policy Advisorys

Re the Senior Policy Advisors meeting on January 21:

- 1. The 10:00 a.m. to 3:00 p.m. sounds like a long stretch. I suggest a shorter time frame.
- 2. I would also suggest that we get a group of five or six of the "Senior Advisors" (i.e., Josh Elkin, etc.) to come together to help you prepare for the meeting. Our hidden agenda is, of course, that this could be the beginning of a real advisory group.

I

COUNCIL FOR INITIATIVES IN JEWISH EDUCATIONMailing address:163 Third Avenue #128Phone:(212) 532-1961FAX:(212) 213-4078

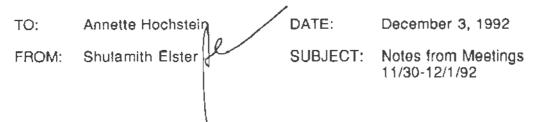


cc: Art Rotman Annette Hochstein

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COUNCIL FOR INITIATIVES IN JEWISH EDUCATION Mailing address: 163 Third Avenue #128 Phone: (212) 532-1961 New York, NY 10003 FAX: (212) 213-4078

## MEMORANDUM



I hope that you and Seymour and Shmuel had a safe and uneventful trip home. For certain, there was much for you to talk about and ponder on the way.

Enclosed are my "working notes" from our meetings. They are, at best, a way to jog the memory. As promised I will use them as the basis for my own work in the coming month.

I will be meeting with Art very shortly to discuss his trips to the communities and how I can be helpful with that assignment.

Best regards.

cc: Art Rotman

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Notes from LC project meeting with Annette Hochstein and Shmuel Wygoda/November 30, 1992

Agenoa items for 11/30 and 12/1 meetings:

- 1. Local commissions
- 2. Design of pilot projects
- 3. Best Practice
- 4. Monitoring, Evaluation and Feedback
- 5. Materials
- 6. Communications and Networking
- 7. Survey of educators in communities
- 8. Goals project
- 9. The CIJE
- 10. How to introduce ideas into the lead communities

The following items from the above agenda were discussed. Notes under each item are just major points of the discussions.

III. Local Commissions

The following questions were raised: Who is the leadership? Who is involved in the local process at this time? How can the community be mobilized? What role can the CIJE board play in recruiting local leadership? How can the local commissions best be organized? possible task forces or working groups on specific issues- e.g., pilot projects, personnel

Comments:

a. CIJE has to provide a framework for the local commissions and communities act within it.

b. Local commissions are particularly important because decisions are not made by the planners alone.

c. Are the individuals who now chair the commissions in Atlanta, Baltimore and Milwaukee the people who can muster the "wall-to-wall" coalitions?

d. Local commission must include top leadership, educators and rabbis.

e. AH suggests contacting Mark Gurvis in Cleveland regarding the Cleveland process. It may be the most advanced that has been done- participation of groups, involvement of academics.

IV. Design of Pilot Projects

1.Specific pilot projects are important as they can "jump start" the local lead community.

2. Barry and Seymour meeting 11/29 to come up with pilot projects and the process by which they will be introduced.

3. Barry will take the lead in the content of pilot projects and the process. Project to cover both formal and informal education.

4. Possible projects may include community mobilization and leadership training.

5. Important role of pilot projects in building credibility

V. Monitoring, Evaluation and Feedback

l.Steering Committee for project now includes: Colman, Inbar, Gamoran, Fox, Hochstein.

2.Researchers will send reports to Adam/Ellen who will submit them to Steering Committee/report then goes to Art and Art will decide how it gets to each community.

3. January report may be limited, interim document or delayed in light of new timetable for launch in local communities.

4. Feedback loop needs to be fine-tuned so as to find a way for useful information to get to the communities.

VI. Materials: Package of Materials- CIJE Resources resources to include: handbook and reference books

1. need for guide/ guide within a guide

Planners know elements of a plan and the required process.

2. need to infuse plan and process with specific content of the lead communities. Draft of guidelines lacks specificity.

3. goals include desire to create a more reflective community

 can be achieved with attention to on-going process of selfassessment (studying selves and developing tools and mechanisms for this assessment)

5. year one: profiles, inventory

year two: achievement measures, client surveys

6. Planning is to be the main task of the local commissionfirst the immediate plan an then the preparation of a five

year plan.

Comments: With what message and by whom does the word of the LC project get to the communities? (See reference in section on communications)

VII, Communications and Networking

(Just the beginning of the discussion)

1. Who is the most likely to be successful in attracting top leadership to the LC project? role of CIJE leadership and board in this process

2. As an example, CIJE leadership can be successful in the effort to get "dedicated staff" for the project in each of the communities. Also in area of funding.

VIII. Educator Survey

1. The earlier the survey takes place, the better.

2.It has utility in the planning of in-service activities and in the planning piece for educators.

3.Isa did work for the commission on educator surveys. LA, Philadelphia, and Miami had surveys at that time.

4. Woocher and others may know of more recent ones.

5. Meier may know of others used in general education.

Assignment: research what exists beyond those cited in Isa's work for the commission.

## NOTES FROM LEAD COMMUNITY PROJECT MEETING December 1, 1992

Participants: Annette Hochstein, Shulamith Elster, Shmuel Wygoda

#### I. Goals Project: Combines two Mandel Institute projects and initiatives

A. The Educated Jew Project

Revised papers now accompanied by an interpretive piece (Maron & Fox)

# B. <u>Training Institutions</u> What will their involvement be in the application of principles in educational endeavors?

- C. At what point will this impact schools-educational institutions? SW not certain regarding classrooms but feels very soon with curriculum planning and development.
- D. Evidence from general education is that without a vision, content, goals, etc. reform will not happen. AG in discussions regarding MEF Project that without goals, difficult to evaluate.
  - 1. Community deliberations on Goals at the Level of:
    - a. institution (principals)
    - b. continuity leadership

2

2. How to introduce :

(Fox and Maron paper)

A descriptive project paper

## E. One year from now -- question from SE to AH:

- 1. public introduction -- speakers
- 2. vision statement

"Seriousness and richness of the project" suggests its power at the level of community.

## II. The Five-Year Plan and Ongoing Self-Study

- A. We know very little about what is happening and what works. Communities should take the lead, in the development of instruments, and make a contribution in this area as they learn about their own community and use information for informed decison-making.
- B. Need for credible, valid knowledge base for educational system. Concern for status of achievment testing assessment.
- C. JU assigned: Guidelines, self-assessment for looking at the system, background material for the communities.
- D. Art to visit each community around Letter of Understanding and the staffing issues.

#### III. Communication and Networking

- \* A. CIJE and Lead Communities
  - 1. What do we want to say to them?
  - 2. Interpretive Piece and JU's assignment to produce handbook
  - 3. Optimum frequency and format
- \*B. Board-Chairman's Letter (AR to develop system)
- C. Between communities -- Networking Advantages and possible "down side" of networking
- D. Communications

AH to review draft #2 of Communications memo

## \* PRIORITY

#### IV. Working with the Community

- A. Next steps
  - 1. AR to call, visit, communicate about:
    - a. next steps work plan
    - b. staffing
    - c. letter of understanding
    - d. congruence

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- 2. Start up Activity
  - a. content
    - I. Pilot Projects
    - ii. Best Practice
    - iii. Goals
  - b. Process
    - i. mobilization of leadership
    - ii. further introduction
    - ili. Commission
      - mandate
      - composition
      - planning assignment
- B. Intelligence at the level of community
  - 1. local talent scouting -- leading and interpreting
  - 2. introduction of concept of key groups
    - a. principals
    - b. rabbis
    - c. planners-federation pros
    - d. lay leadership
    - e. et al.

\*\*\*3. How should this happen in the community? Educators -- BH and SE Planners - AR and SE Other Groups - ? and SE

SE to decide how this should be organized. SE to review composition of local commissions in relationship to intelligence about opinion leaders in each Lead Community.

(?) When will local Commissions be ready to go?

- C. Pilot Projects:
- D. Best Practices:
- E. Fund Raising:

#### \*\*\* MAIN ASSIGNMENT = highest priorty

#### V. Community Scenario: Next Steps in the Community -- One Scenario

- A. Planner
  - 1. has received Best Practices papers
  - invite Barry to community to bring content "into motion" in the community
  - 3. will convene group regarding pilot projects

- B. Arrange Ongoing Seminar with Principals:
  - 1. In-service training of teachers
  - 2. Best Practices

Result will be part of planning!

- C. Concurrent meetings on local level with key groups
- VI. Interpretive Piece Specific comments by AH:
  - A. Role as a talk piece
  - B. One of CIJE resource pieces
  - C. Needs to be more specific and closer to the original message of A Time To Act
  - D. Personnel needs to be up front
  - E. Omit sections on "all groups" and "settings"

TO: ANNETTO HAR HISTOR

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Notes from LC project meeting with Annette Hochstein and Shmuel Wygods/November 30, 1992

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	Date 11/24/92
	PAPERS ARE REFERRED
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Remarks / Stuart E. Eigenstat Council // Jawish Federations Council for Initiatives in Jawish Education New York, New York Novamber 12, 1992

We all carry the heavy burden of having failed to react more urgently to the pieces of evidence which filtered into the United States before and during World War II about Nazi intentions to destroy the Jews of Europe. In the process, we lost a third of the Jews in the world.

Faced hoday with a very different threat, one more subtle, without clear external enemies, but a threat nevertheless to the survival of meaningful Jewish identity in the United States, we continue to act as if no crisis is upon us. Yet, a huge bombshell has been dropped in our midst--the CJF National Jewish Population Survey. Yet our Jewish institutions and leadership has reacted as it only a popgun had counded.

Stuart E. Eizenstat was Assistant to the President for Domestic Affairs and Policy and Executive Director of the White House Domestic Policy Staff from 1977-1981. He is a partner and Vice Chairman of the law firm of Powell, Goldstein, Frazer & Murphy in Washington, D.C., and an adjunct lecturer at the Kennedy School of Government, Harvard University. Mr. Eizenstat appreciates the excellent research assistance of Mr. H. Andrew Schwartz and the help of Mrs. Shulamit Elster, Jewish Education Service of North America, Inc. (JESNA).

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Only a major sea chance in the priorities of the American Tewish community, which will place Jewish education--a systemically reformed Jowish education--at the top of the agenda, can provide hope against the mounting tidal wave of assimilation which threatens to engulf us.

#### \*\*\*\*\*\*\*\*\*\*

We have been doluded by the increasing Jewish commitment of a core of American Jowry, obviously including this audience, into believing that we are thriving as a religion, rather than being weakened internally. We are mesmerized, even blinded, by our own very real accomplishments in this great and good country.

• There has been an explosion in the Jewish Day School movement, with over 500 full-time day schools, no longer limited to the Orthodox community. Of the approximately 550 day schools, 14.5 percent describe themselves as Communal, 14.7 percent as Conservative, 28.3 percent as Orthodox, and 2.5 percent as Reform. With regard to enrollment, 5.9 percent of the nearly 168,000 day school students are enrolled in schools under Communal sponsorship, 9.8 percent in Conservative schools, 83.1 percent in Orthodox, 1.2 percent in Reform schools. (Issace, p. 66). Reform day schools are opening in cities like Atlanta. For those parents wishing to provide a Jewish education for their children, over one third are opting for the more intensive

oducation a Jewish Day school provides. (36 percent). From 1957 until 1987, the number of day schools more than doubled from 248 to nearly 550, and day school enrollment increased fourfold from 42, 650 to over 168,000. In 1987, "fewer than 8 percent of those enrolled in Jewish schools were in day schools, compared to nearly 36 percent in 1987." (What We Know About Jewish Education, ed. by Dr. Stuart L. Kelman, from the article "What We Know About...Enrollment", Leora W. Issacs, p. 64).

 Between 1931 and 1982, there was an 8 percent increase in the total number of Jewish schools and a 26 percent increase in the number of students in Jewish Day schools, supplementary schools and independent preschools.

• More American Jews than ever engage in overt religious practices--from almost one in five families keeping a kosher household to wore kipct in public to an increase in religious tradition across denominational lines.

• American Jewish political influence is at its zenith, with more than 90 Jewish-oriented political action committees raising over two million dollars annually to support candidates with pro-Israel and pro-Jewish agendas, and with organizations like AIPAC and the Conference of Presidents of Major Jewish Organizations effectively advocating Jewish interests. We vote in high numbers. We were 4 percent of the total vote this November 3,

more than twice our percontage of the population, and we were deeply involved in both major party's presidential campaigns.

• You at UJA Federation raise the staggering sum of close to \$700 million annually, not counting the special appeals for Jews from the former Soviet Union, while Israel Bonds raised \$1 billion last year.

• Linkages with Israel are growing. In 1990, 10,000 American Jewish high school and college students studied in Tsrael. Benior citizens, young adults and teenagers are participating in volunteer programs which are helping strengthen the Third Jewish Commonwealth.

But these positive developments are occurring only within the core minority of the American Jewish community. As the CJF study and others have dramatized, there are long-term danger signals because a larger number of American Jews are disaffiliating from the Jewish community and its institutions. Too many American Jews are misusing the freedom our country has given us and the unparalled access we have been given, particularly since the 1960s, to fully participate in the mainstream of American life. We have failed to recognize that the greatest gift we can make to America is to retain out identity, culture, religion and traditions so that we can

continue to enrich the diverse cosaic of our country, which is our nation's distinguishing feature.

• Only a minority of American Jewish school age children (ages 2 to 17)--46 percent--are enrolled in any organized program of Jewish education. Eighteen (13 percent) of all school age children are in day schools and 28 percent are in supplementary schools.

• While supplementary schools are the predominant form of Jewish education, with nearly two-thirds of the students in Jewish schools, the total number of these schools, as well as their enrollments, has declined dramatically over the past decade. In 1987, "there were 1,879 supplementary schools throughout the U.S., as compared to a peak of 3,154 schools in 1957, and supplementary school enrollment has declined 43 percent from 511,000 to 207,000" from 1957 to 1987. (What We Know About Jewish Education, ed. by Dr. Stuart L. Kolman, from the article, what We Know About... Enroliment", Leora W. Isaacc, . 64).

In great part this decrease in enrollment is due to the declining birthrates, together with the growth in the day school movement. But it also reflects the dichotomy in American Jowish life: the periphery is abandoning Judaism and the core is increasingly engaged in intensive Jewish activity.

One of the most serious signs of the deterioration in Jewish aducation is the diminished intensity with which supplementary

schools, still the avenue for the vast majority of American Jewish youth who come into contact with Jewish education, teach our children. There have been "significant decreases in the numbers of both one-day-a week and five-day-a-week supplementary schools and an increase in the three-day-a-week form. In 1946, 62.7 percent of students enrolled in supplementary schools attended five days per week; in 1958, 66percent of the students attended three days and only 6 percent attended five days. By 1970 there were almost no five-day supplementary schools left. Meanwhile, there has been a growing tendency away from one-day-aweek only supplementary programs. These have become most common for young (ages three to mine years) and post-Bar/Bat Mitzvah students and under reform congressional sponsorship." ( Isaacs, Four Decades of Jewish Education, p. 5).

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• Less than a third of American Jewry has visited Israel even once, even though we waited two millennia for the rebirth of a Jewish state in our lifetime.

 Less than half of us belong to any Jewish institution or contribute to any local UJA Federation or practice any consistent pattern of ritual observance.

• Our birthrate is the lowest of any group in American society and is at zero population growth. As the CJF study informs us, only 4.3 million Americans--1.8 percent of the U.S. population

(one-half the percentage of the U.S. population in 1930) -identify themselves as Jews by religion, one and half million less than we assumed.

• Since 1935, interfaith marriages involving a Jewish spouse exceeded 50 percent, up from 30 percent as recently as 1970. To compound matters, conversion rates by the non-Jewish spouses are down to rock bottom--6 percent. As many Jews convert to Christianity as Christians convert to Judaism, while 600,000 Americans born or raised as Jews now have either no religion or have another religion.

Your own CJF study documents that where there are not conversions, less than one third of the children of mixed marriages are raised as Jews. A Philadelphia study showed that virtually none of the grandchildren of mixed marriages without conversions to Judaism identified themselves as Jews.

\*\*\*\*\*\*\*\*\*\*\*\*\*\*

A bell tolled last year when the CJF study was published, but most of our Jewish institutions and leaders have failed to react as if it tolled for us. We continue to pursue business as usual.

I believe that the Council of Jewish Pederations nationally and UJA Federations locally, must lead the way in responding with urgancy and a new sense of priorities.

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What has made the U.S. the most upwardly mobile society in wheth history has been a commitment to a quality education for all of our children, as a virtual secular religion. We Americans have always believed that a good education was the most important ingredient we as a society can provide to our children, to make them contributing and productive citizens to our democracy.

We do not have a similar attitude toward Jewish education, . but wo must.

While there is no single antidote to the threat of assimilation and intermarriage without conversion, surely the most effective is Jewish education, broadly defined, at every level and for every age group--a lifetime experience. This will only become a reality if we undergo a major change in our attitudes and priorities and this, in turn, leads to systemic changes in the funding, quality, and organization of Jewish education.

Jewish education is the vchicle through which we transmit our history, our culture, our heritage, our religious practices. our teachings, our ethics and values from one generation to the next. If these are not firmly rooted in our children by parents and grandparents, then they will not be armed with the tools to understand the beauties of our religion, the meaning it can provide to enrich our lives, its practical utility in dealing with life's challenges. They will be left defenseless against the temptations of assimilation. They will have no reason to

presarve our particular America and deprive our

preserve our particularity; they will melt into the landscape of America and deprive our country of our distinctiveness.

And you and I and our generation will bear responsibility for the spiritual loss of Jews by our inaction, as an earlier generation failed to act to save the physical lives of Jews in World War II.

I was fortunate to be a member of the Commission on Jewish Education in North America, which, thanks to the remarkable leadership and generosity of Mort Mandel, took the most in-depth, comprehensive look at Jewish education in modern American history, with a broad range of Jewish educators and educational leaders. Its report, <u>A Time to Act</u>, noted a Jewish education system beset by "sporadic participation; deficiencies in educational content; an underdeveloped profession of Jewish education; inadequate community support; the absence of a research function to monitor results, allocate results, and plan improvements."

From my own personal perspective I would be more blunt. The Jewish supplemental school system of Hebrew and Sunday schools is disastrously inadequate. The Day school system, while a major improvement, still has a long way to go. In many communities it does not extend to the high school grades. Its graduates frequently have no fluency in Hebrew. Adult education programs, while sprouting-up on many Jowish community centers and synagogues is uneven, at best.

This report was the Jewish equivalent of the dramatic report, <u>A Nation At Risk: The Imperative for Educational Reform</u>, a report to the nation and to the U.S. Secretary of Education by the Commission on Excellence in Education in 1983. This landmark report sparked the nationwide movement for education reform, which reached the level of the President, with his Year 2000 goals.

The problem is that the Jewish community and its leaders have not reacted to the crisis in Jewish education presented in A Time to Act with anything approaching the urgency that Governors, Members of Congress, labor and business leaders, and the President of the United States have done in response to A Nation At Risk.

The Commission in <u>A Time to Act</u>, developed a plan to begin to address these problems, including:

 <u>Building a profession of Jewish education</u>, so that talented people are attracted to the field; faculties are expanded; training, salaries, and benefits are dramatically upgraded; new career-track opportunities are opened-up.

 Mobilizing community support by raising Jewish education to the top of the communal agenda; recruiting top community leaders to the cause of Jewish education; and providing substantially increased funding from federations, private foundations and other sources.

• <u>Developing a research capability</u> and a comprehensive research agenda to monitor results and make informed decisions and to conduct on-going studies on the state of Jewish education.

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• Establishing three to five Lead Communities to function as local laboratories for Jewish education, and to determine, based on local initiatives, the educational practices and policies which work best.

• <u>Creating the Council for Initiatives in Jewish Education</u> to operate as a catalytic agent to help assure implementation of the Commission's plan; to help secure funding; oversee the establishment of the Lead Communities; and to help replicate the successful experiences from the Lead Communities throughout North America.

The Council, again thanks to the dynamic leadership and vision of Mort Mandel, is beginning the difficult process of carrying-out the agenda of <u>A Time to Act</u>. Fifty seven (57) North American communities were invited to participate in the selection process for Lead Communities; twenty three (23) submitted proposals from which nine (9) finalists were selected. The Council Board reviewed these nine proposals, consulted with educators and lay leaders and made site visits. Three (3) Lead Communities were selected after this exhaustive process--Atlanta (70,000 Jews), Baltimore (90,000), Milwaukee (28,000).

The thesis of the Lead Communities project is that "the best way to generate positive change at the continental scale is to mobilize the commitment and energy of local communities to create successes that stand as testimony to what is possible. (Lead Communities Program Guidelines, p. 8 ). Rather than emphasize individual programs or schools an entire community was selected because "lasting educational reform involves the interaction of school, family and community...One needs to effect the entire system, not just a single setting, program or age group." (Program Guidelines, p. 9).

Our Commission on Jewish Education in North America recommended that lead communities focus on two "enabling option" activities, which enable broader change to occur: empowering the personnel who make-up the Jewish educational system and broadening community support for Jewish education.

#### \*\*\*\*\*\*

Permit me to offer suggestions about how to achieve the systemic changes in Jewish education which the Commission recommended and which are imperative for Jewish continuity in the United States:

1. The first imperative is for our Jewish leadership, particularly the UJA Federation leadership which is the backbone

of the Jewish community around the nation, to place Jewish education at the very top of their list of priorities. It would do little good for Israel in the long run if we continue to sap our strength in the United States, which is so vital to their support.

2.14/18

Again, neither <u>A Time to Act</u> nor the CJF Population Survey has yet had the impact it should. If the United States is a nation at risk because our education system is inadequate to the challenges of the global economy of the 21st century against competitors with a far better education system, then how much more are we as a Jewish community at risk because of our woefully inadequate Jewish education system in the competition against assimilation and indifference?

2. <u>Priorities cannot be established by rhetoric. They must be</u> <u>demonstrated by money</u>. Jewish education is under funded in our Jewish communities throughout the country. This is not to suggest that there has been no progress. Between 1987 and 1991, total dollars allocated for Jewish education by federations nationwide has increased by 14.5 percent, although this has flattened out in the past year given the economic problems of the country. But even this increase is not substantially above inflation over this four year period.

Now about 26 percent of moneys spent locally by federations go to Jewish education. This is insufficient. <u>A goal should be</u>

set to achieve an allocation level of 40 percent of local funds for Jewish education by the year 2000.

Day Schools are clearly the most promising form of Jewish education given the intensity of Jewish education they can provide. Additional community funding of day schools can both help them improve their faculties and facilities and can help keep costs down to levels which make it accessible to more hardstrapped parents as a viable option to public or secular private schools.

To help achieve the goal of additional local federation funds for education, I recommend that <u>CJF consider suggesting to</u> <u>their local federations that there be an additional, optional,</u> <u>line on pledge cards which will permit donors to designate a</u> <u>portion of their contribution for Jewish education</u>.

As an alternative, if this would interfere too greatly with the ability of federations to allocate resources, a special thr. year nationwide campaign should be launched by 1997, when most Jews from the former Soviet Union will have settled in Israel, to build up a large trust fund for Jewish education. This would be patterned after the special campaigns like Operation Exodus and Operation Moses and previous special appeals. There is a crisis and this would dramatize it.

3. Jewish supplementary schools still educate over 60 percent of the Jewish children receiving any form of Jewish education. For obvious reasons, there is a reluctance to use community funds

for individual congregational-based schools. However, to encourage the efficient use of limited resources and to upgrade the supplementary school system, local federations should provide funding to encourage "magnet supplementary schools" formed by several congregations or other communal groups which are willing to bool their limited resources.

4. <u>Israel must be challenged to play an even bigger role in</u> <u>American Jewish education</u>. Israel will soon have the largest Jewish population in the world, as their population swells with relatively high birthrates and continued emigration from Eastern Europe and the former Soviet Union, where 1.2 million Jews have already filled-out applications to be united with families already in Israel.

Israel is the center of Jewish life and has an obligation to help fight assimilation. The WZO spends some \$34 million on Jewish education in the Diaspora and helps provide teachers, materials and technical assistance. I am aware of the enormous budget pressures on the Jewish Agency and the WZO. But more money must be allocated to Diaspora Jewish education.

The Jewish Agency and WZO should organize an Israeli Teacher Corps in which communities, kibbutzim, and Israeli universities would be challenged to send, with UJA Federation assistance, gualified people to help teach in American Jewish schools for up to two years.

5. We should take a page from American Mormons, who expect their children to serve on a mission abroad, by establishing a <u>one-year mission for our children in Israel either as part of</u> <u>their high school education or between bigh school and college.</u> <u>as part of the obligation of being a Jewish parent. This should</u> <u>become expected and routine</u>.

It is absolutely clear that study and travel in Israel are life-forming experiences in experiential learning and education which build-in strong Jewish identification.

Local federations can encourage this activity by providing a few, coveted scholarships, based on merit, for study in Israel. This will demonstrate UJA Federation's commitment to Jewish education in general, and to travel in Israel in particular.

6. <u>Goals should be set in terms of Hebrew fluency</u>. A working knowledge of Hebrew builds in a strong sense of Jewish identity. Day Schools should expect, as a condition of graduation that their students can pass an examination in Hebrew fluency. Supplementary schools should do their best to introduce Hebrew language studies so that students can at least carry-on an elementary conversation in Hebrew.

Even our day schools fall far short of these goals. If students took French, Spanish, German, Russian or Japanese for twelve years, or even six, in a public or private school there is little doubt they would be fluent. In Canadian day schools, students by and large acquire a fluency in Hebrew as a spoken

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language. Not so in many of our Jewish day schools. This will require an attitudinal change by Jewish educators, so that, for example, Judaic courses in day schools are taught in Hebrew from the first grade on. Hebrew must be seen as a living, spoken language.

7. To encourage more adult Jewish education, Jewish Community Centers should be encouraged through federation funding to provide the type of serious adult Jewish programming that the JCC of Greater Washington has developed, in addition to concentrated certificate-granting education programs within the JCC context. The Florence Melton Adult Minischool program is an excellent model. It exists in a score of cities and grants a Certificate in Jewish Studies from the Hebrew University for a two year program, taught one night per week for 30 weeks.

8. To set an example and to assure that our Jewish leaders are themselves educated in Judaica. it should be a condition of accepting the presidency of every major Jewish organization, whether at the local or national level, that in-service Jewish education be provided and accepted. Organizations like Rabbi Irving Greenberg's CLAL should be encouraged to widen their reach in educating emerging Jewish leaders.

The time to act is now. We cannot delay any longer.

Received: by HUJIVMS (HUYMail-V6j); Tue, 10 Nov 92 22:45:56 +0200 Date: Tue, 10 Nov 92 22:45 +0200 From: <ANNETTE@HUJIVMS> To: bat@CUNYVMS1.BITNET Cc: annette@hujivms Subject: Re: hello again

Dear Barry,

Seymour and I are coming to the US next Wednesday -- our goal is to work with all involved to get the Lead Communities project further into the communities. In order to do the work we would like to meet with you, both prior to - and again after - the workshops of November 19/20 and 23/24 -- depending of course on availability. Seymour asks if you could meet with him on Wednesday the 18th at 12pm at the JCCA. If possible this would be followed by a meeting of the three of us and possibly others - we'd like to continue until 4 or 5 pm.

Looking forward to fruitful work together

Regards to Bethamy and to your children

Annette

p.s. Please let me know - any technology will do.



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

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Date:	Vd.	10				
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\*If you experience difficulty transmitting to this FAX number, please use the JTS main FAX number as an alternate:(212) 678-8947. Kindly indicate that this message should be forwarded to the Melton Research Center. Thank you. i

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To: Seymour

From: Barry Holtz

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

1) Shulamith and I have talked about the two of us meeting with you on Wednesday, November 18th from 3 to 5 PM.

2) Do you think you could find time to meet with Edy and me to talk about Melton issues -- in particular thought you might have about us approaching Sam and Florence for funding; future directions for the Center, etc.

3) My friend Alan Mintz, now a Professor of Hebrew lit at Brandeis has a very interesting proposal about setting up some work at Brandeis in dealing with the Hebrew issue for Jewish education. He would like to talk to you about this with the thought that this might tie in to CIJE work, Mandel institute interests, Mort's interests, etc. I would personally appreciate it if you could meet or talk with him.

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

UKELES	ASSOCIATES	TIMESHEET
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WEEK OF	<u>J. UKELES</u>	J. MEIER	ASSOCIATES	TOTAL
Aug. 25-28	5.00	0.00	0.00	5.00
Sept. 8-11	5.50	.25	0.00	5.75
Sept. 13-18	5.25	2.75	0.00	8.00
Sept. 20-25	16.50	5.00	0.00	21.50
Sept. 27-Oct. 2	9.50	1.00	0.00	10.50
Oct. 4-11	7.00	4.00	0.00	11.00
Oct. 12-18	3.75	3.00	0.00	6.75
Oct. 19-25	11.00	7.75	0.00	18.75
Oct. 26-31	4.50	14.75	0.00	19.25
Nov. 1-6	9.00	16.50	0.00	25.50
Nov. 8-13	10.00	6.50	0.00	16,50
Nov. 15-20	7.25	10.50	0.00	17.75





Dec. 02 1992 4:40PM P01

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# MEMORANDUM

To:	Art Rotman Jack Ukeles Grade
From	Jack Ukeles Chance
Date:	12/1/92 0
Re:	Draft Letter of Understanding
ee Anne	te 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 cales by . All new material is in italics.

I changed the format slightly instead of a Dear Million, 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 for their contribution to be use of Baltimore reflects the language proposed by them 1, is not close to the bed or gravity - they added a "commit our best efforts to the or close to the bed by the local resources in the 40% increment that they will by the state of the bed by proposed for Atlanta. The language Milwaukee proposed is the bed by the bed by the state of the difference would fly in Atlanta or Baltimore. The bed by the difference would fly in Atlanta or Baltimore. The best for the difference would fly in Atlanta or Baltimore. The best for the difference would fly in Atlanta or Baltimore. The best for the difference would fly an Atlanta or Baltimore. The best for the difference would fly an Atlanta or Baltimore.

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If CIJE is now prepared to provide resources to be used for either conduction or staffing (as per the communities request at the Workshop), that this prograph needs to be amended to reflect CIJE support for staff or consultants (see page 7). In which case, I think we will have no problem with the change.

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4. Atlanta expressed concern also if the lack of parity in language. "There is specific language regarding expectations of visit." The consistency of anguage is preferred." I have not addressed their concern.

\* UKELES ASSOCIATES INC.

From : Ukeles Associates Inc.

PHONE No. : 12122608760

Dec. 02 1992 4:42PM P03

DRAFT

## COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

L AD COMMUNITIES PROJECT Malang Address

163 Third Avenue K123 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 to the initial vesting Towish Education (CHE) have agreed to participate in a joint book concentration to the book concentration of the concentration of the book denses in Jewish education, called the Lead Communities Project

The Commission on Jewish Education Notificial entropy of the second of the best way to generate positive change at the community of the second of the second of the second of the second communities.

The lead community is expected to function to a reactive range of the when education, to determine the educational practices and equivalent to determine the education through a wide array of intensive programs in determine whet can happen when there is an infestion of edistanding personatel the the education system. Alth a high level of community support and with the necessary handing "<sup>3</sup> 2.

The Jewish community of Beltimore has excepted at Compassion of level Education of THE ASSOCIATED. The community new start for the start of the procession operation, to break new ground in one strategic planary pla

This letter is a summary of discussion of the can the Council for Introduces on Jewish Ellocation (CIJE), and the Baltimore Jewish Federation inspergeous is to clarify can initial expectations with regard to the implementation of the Lond Continenties Project on Bultimore

This letter covers the period to August 31, 1995 Cover Covers

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

A Time to Act (University Press of A that have been been press of the above of 69

See also Lead Contractives Dr. government and planetty 1995, per \* 11

During 1992-93, the lewish community of Hottimore will the advice and assistance of CHE, will prepare a five year plan for improving lowish education. The plan will include: a needs assessment, mission or vision statement(s), program provides, 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 recorporate appropriate elements of work already completed.

Along with the five year plan, the community will also propage 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 suppresentation of the first year's Action Program and prepare an Action Program for 1994-95.

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

In support of these effores, CLIF agrees to

- Offer models of successful programs and experience in the last Practices Project. Best practices will be identified in a variety of areas, including. Supplementary Education, Early Childhood Education, 300 programs, Israel Experience, Day School, Campus Programs, Camping, and Article Education and entitlet of on all areas will be made available between December 1992 and the summer of 1995. The lead community will consider adapting and antroducing these models of the light of local needs and interests during the Action Years of the project with the advance of Cill.
- Provide technical assistance in patiency and educational development.
- Work to focus continental resources for lewish education on the lead communities, specifically, the CIJE will introduce potencies 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 Lond Community and CUE.
- Convene lead community leadership for periodic directings or commen concerns.

The Lead Community agrees to:

- Establish a Lead Community Communice to direct the project. The Commune will be made up of top community leadership representing all elements of the community --Federation, congregations, instructions involved in tarinal and informal education, and the full spectrum of religious movements represented on the community. The Committee will be chaired by LeRoy Hoffberger.
- Provide opportunities (such as town meetings or subcommutees) for stakeholders from all sectors of the community is meaningfully participate in the platning process -including consumers of Jewish calculation, (e.g., parents and students), educators, board members and Rabbis.
- Appoint a Lead Communities Planning Director to sufficient and to its numbers Commutee and to coordinate the work of concentrate and planning processional resources in the community on the Plan. Sense professionals of the community (e.g. the Planning Director of Federation and the concentrate of the Blit) and expected to be fully involved in the process.
- Prepare a five-year plan, one atrian accord programs (as described above).
- Appoint a Lead Communities Director to direct the Action Program for 1993-94 onward.
- Integrate the findings of the Best Produces Program appropriate to the Least Community (as discussed above).
- Identity and begin one or more experimental parameters 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 possinces committed to Jewish education. Based on one community's experience in implementing the recommendations of its Commission on lewish continuity, significant expansion" should result in a target of at least a 40% intercise in communal resources for Jewish education by the fluid year action program. The definition of communal resources endorsed and underscored here includes the rotal dottary from which funds would be allocated, including regular allocations, local and non-local foundation grams, endowment funds raised through its Fund for Jewish Education, and off of sources of funds.
- Collaborate with CIFE on the monitoring, evaluation and tendout's system, and utilize the results.

Work with CIJF to disseminate the feadly 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 summated at the end of one of these reviews if it appears to either partner that the other has tailed to perform in relation to this agreement.

CIJE		Federation	
By:	AMERI	CAN BYENNISH	÷.
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From : Likeles Associates Inc.

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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 commonity of MalantPand the Control for invition second lewish Education (CUE) have agreed to participate in a joint local-continential collaboration for excellence in lewish education, called the Lead Communities Project.

The Commission on Jewist Educator in North America, CORPOR found that the best way to generate positive change at the community scale as to not here are constitutioned and energy of local communities to Jewist communities.

The lead community is expected to function as a local abitatory of Jewish education, to determine the educational practices and polivice has work loss, to redesign and improve Jewish education through a wide array of intensive programs, to containshate what can happen when there is an infusion of outstanding privative into the education system, with a high level of community support and with the necessary functing.

The Jewish community of Atlanta has established a Councer for Jewish Community. The community views the Lead Communities Project as an opportantly we derive significantly the quantity and quality of Jewish education services areally, a well as to act as a model for other Jewish communities in North America of how devich education can be improved in order to have a measurable effect on Jewish continuity.

This letter is a summary of discussions between the Control for initiatives on lewish Education (CIJE), and the Atlanta Jewish Federation. Its purpose is to classify out musual expectations with regard to the implementation of the Lend 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

A Time to Act (University Press of American Landam, Vid. 1980, p. 17, see also pp. 67-69.

See also Lead Communities Program Unidennes (January, 1992) pp. 7-11.

A REAL PROPERTY AND A REAL

During 1992-93, the Jewish community of Atlanta with the advice and assistance of CHE, 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 provides, and a strategy for financial and human resource development. The plan will boild 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 ordine of the 5 year plan identifying the major topics to be covered, preliminary findings, and program ideats.

The community will also prepare an Action Program for 1993-04 which will include the schedule of the specific improvements to be undertaken, and the closes us not revenues associated with each specific improvement effort.

During 1993-94, the contraonity will carry out the orple second of the first court's Action Program and prepare an Action Program for 1994 9<sup>e</sup>

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In support of these efforts, CHE agrees to:

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- Provide technical assistance or printing and reaction development, it mucost to the community.
- Work to focus continental resources for Jewish education on the Lead Communities Specifically, the CHE will introduce potential funders to the community – including continental foundations incorrected to specific project areas.
- Negotiate with foundations, organizations, and placeders of programs training institutions, JCCA and JESNA -- to define the matter of their involvement and their contribution to Lead Communities
- Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CUE.
- Convene lead community leadership for periodic meetings of 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 rown meetings of subcommittees) for succheders from all sectors of the community to meetinghely participate in the planning process -including consumers of lewish education (e.g. parents and students), educators, board members and Rabbis.
- Appoint staff to the Council for Earth Contract, and to conclusive the work of educational and planning protections are seen and the Plan. Senior professionals in the communication of the BJE, are expected to be fully moved at the process.
- Prepare a five-year plan, and manual action programs, or described above).
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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.

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PHONE No. : 12122608760

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## COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

LEAD COMMUNITIES PROJECT - Mailing Address 163 Trikit Avenue #123 - New York, NY 10003 Icl. (212) 532-1961 - Tax. (212) 213-4078

December 2, 1992

#### LETTER OF UNDERSTANDING

The Jewish community of Milwauker and the Control to a four street in Jewish Longaints (CIIL) have agreed to participate in a joint local-contracted to the boundary for excellence in Jewish education, called the Lead Communities Project.

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<sup>\*</sup> See also Lead Communities: Program Guidelines (January, 1992) pp. 7-11.

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#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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The Lead Community agrees to:

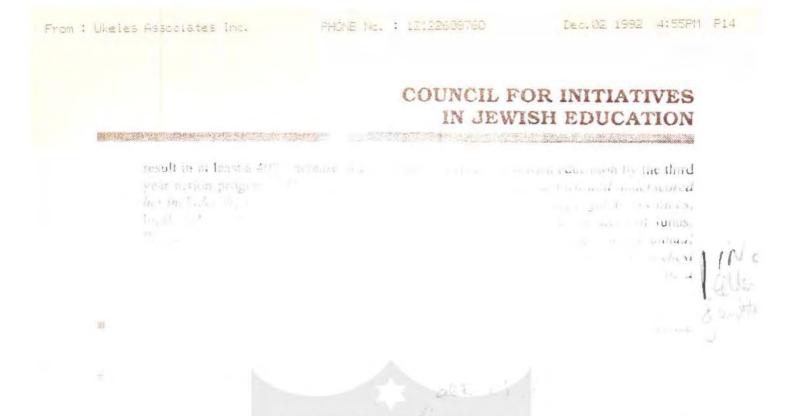
- Establish a Commission on fourty Education to choose the project. The Commission will be made up of top commonly loaders op operatoring di caractus of the community --Federation, congregation, motivity of the effective and an enclarate valueation, and the fall spectrum of triber a second provide the commission will be charted by I can't Share and once enclusion
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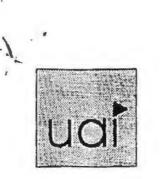
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UKELES ASSOCIATES INC. 611 Broadway, suite 505 · New York, NY 10012 tel (212) 260-8758 · Jax (212) 260-8760

## FACSIMILE TRANSMITTAL SHEET

	DATE: 12/2/92
ro: Annette Hochstein	FROM: Jack Ukeles
COMPANY: Inter-Continental	PAGES (including cover):
FAX #: (212) 644.0079	FAX #: (212) 260-8760

MESSAGE:

If there is a problem with this transmission

please call \_\_\_\_\_\_ at (212) 260-8758.

#### MEMORANDUM

To: From:	Art Rotman Jack Ukeles	Joile
Date:	12/1/92	v
Re:		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.

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, 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 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.

- DRAFT

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."<sup>1, 2</sup>

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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<sup>2</sup> See also Lead Communities: Program Guidelines (January, 1992) pp. 7-11.

<sup>&</sup>lt;sup>1</sup> A Time to Act (University Press of America, Lanham, Md., 1990), p. 17; see also pp. 67 - 69.

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

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Title: Date:

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

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## 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

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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.

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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

<sup>&</sup>lt;sup>1</sup> A Time to Act (University Press of America, Lanham, Md., 1990), p. 17; see also pp. 67 - 69.

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- 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.
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- 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 ; Associates Inc.

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#### COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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- 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.

Federation	
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## MEMORANDUM

To: Arthur Rotman Shulamith Elster Sol Greenfield Mitchell Jaffe

c/o Johnn Schaffer

From: Jim Meier

Date: November 13, 1992

Re: Draft in progress of planning manual

The attached draft in progress is just that. While incomplete and in rough form, I would like your reactions both to ensure early course corrections and because we will soon need to present it to the lead community planners.

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#### - DRAFT IN PROGRESS -

FOR INTERNAL DISCUSSION ONLY

#### LEAD COMMUNITIES PLANNING GUIDELINES

#### 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 long before CIJE came on the scene. 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 implementation can begin in the Fall-of-1993, and

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

• 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 want 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. 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

<u>Rationale</u>: First steps refers to preparations, attending to everything that can be done in advance to allow for smooth sailing once the serious work gets underway.

<u>Deliverables</u>: The most important objectives of this phase have already been accomplished by the lead communities:

Leadership has been identified, and

• The planning committee has been established

#### Benchmarks/tasks

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• Compile packets of background information and distribute to each of the committee members. Box 1 contains a selection of materials that might be useful for this purpose.

• Establish a detailed timetable for the project by working backward from the year 1 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. Don't forget to scan major Jewish and national holidays for conflicts. (See Box 2 for sample schedule)

iducational Deaders

2 for sample schedule.) Contout revew + establishmer & gub - ctess + cleans • Consider if sub-committees should be organized, and if so, in what areas. For example:

. In major Jewish education program areas such as supplementary schools, day schools, informal education, higher education, adult education.

. In major functional areas such as personnel, funding, programs, coalition building.

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

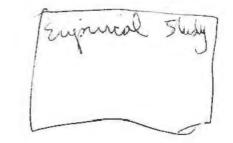
**Box 1: Examples of Background Materials** 41 Juds · A Time To Act - -11 1 1. 11 · Draft of CIJE letter of agreement · Previous planning documents, particularly on Jewish education or continuity, prepared by your community. · Summary of most recent Jewish population study for your community.

hase	Time table (months)	Deliverable	Committee Meeting Subject	1
l. Start-up	0-1	<ul> <li>Form committee</li> <li>Detailed workplan</li> </ul>	Ia. Major issues in Jewish $M$ Education $S$ Ib. Review of workplan	20
2. Needs Analysis and Profile	1.5 L	<ul> <li>Design scheme</li> <li>Profile of Jewish education;</li> <li>strengths and weaknesses</li> <li>Report on findings</li> </ul>	2a. Design of needs survey ? 2b. Presentation of profile ? 2c. Discussion of findings	it in
3. Critical Issues	4-6	<ul> <li>Formulate issues</li> <li>Draft community mission statement</li> </ul>	3a. Resolve strategic issues 3b. Approve mission/vision statement(s)	
4. Recommend- ations and Prioritics	7-8	<ul> <li>List of recommendations with priority rankings and priority sequencing</li> </ul>	4. Recommendations	
5. Programs	6-9	<ul> <li>Draft guidelines</li> <li>Define program priority areas</li> <li>Issue call for program proposals</li> </ul>	5a. Define program priorities	
6. Implement- ation Plan	8-10	<ul> <li>Draft budget with resource objectives</li> <li>Compile summaries of program options</li> <li>Prepare first year implementation plan</li> </ul>	6a. Set resource objectives (\$) 6b. Select programs for next year 6c. Approve overall implementation plan	

Time Guideline: Allow 3 - 4 weeks for the start-up phase of work.

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#### **II. ANALYSIS OF NEEDS**



1:D

Rationale

The foundation of the plan is an assessment of the needs for Jewish education by potential users. A well-done needs analysis serves the process in the following ways:

• 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.
- Can help to establish 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 potential users of the service.

#### Issues

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?

1. <u>Targeting</u>: 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 groups to be the focus of research.

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

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- · Early childhood
- Ages 5-13
- · Post Bar/Bat Mitzvah
- · Jewish educators, formal and informal
- · Families of young children

#### **Box 3: Targeting**

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

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

• **Priority**: How high a priority is the 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?

2. 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 4.

#### Box 4: 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 clsewhere 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.

#### 3. 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 cubacks).

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? If enrollment is low 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.

Given the imperative to get underway quickly, we would encourage you to rely on existing information on quality and effectiveness, to the extent possible. Generally speaking, three types of measures can be used: (1) input, (2) output or performance, and (3) outcomes. See Box 5 for examples of measures you might want 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 5: 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 levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, per cent of eligible population participating in formal and informal Jewish education by age group, 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.