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CJENA correspondence, meetings, reports, and commissioner  
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8 RH	4-14-89	Peter Szanton, "The Intermediaries -- Some Early Observations" plus C.V.

MI-G

28051  
March 29, 1989

DRAFT - FOR DISCUSSION ONLY -- NOT FOR QUOTATION

## **A Mechanism for Initiatives in Jewish Education**

**S. Fox & A. Hochstein**

### **I. BACKGROUND**

Between August and December 1988, the Commission on Jewish Education in North America engaged in a decision-making process aimed at identifying those areas where intervention could significantly affect the impact of Jewish education in North America.

A wide variety of possible options were considered. The Commission opted for focusing its work initially on two topics:

1. Dealing with the shortage of qualified personnel for Jewish education; and
2. Dealing with the community -- its structures, leadership and funding, as keys to across-the-board improvements in Jewish education.

At the same time, many commissioners urged that work also be undertaken in various programmatic areas (e.g. early childhood, informal education, programs for college students, day schools, supplementary schools).

### **II. THE CHALLENGE**

The wide consensus among commissioners on the importance of dealing with personnel and the community did not alleviate the concern expressed by some as to whether ways can be found to significantly improve the situation in these two areas. Indeed, a number of commissioners suggested that agreement that these areas were in need of improvement has existed for a long time among educators and community leaders. Ideas have been suggested; articles have been written; conferences have been held; some programs have been tried. Yet significant improvement has not come about. Some claim that we seem to know what the problems are, but have not yet devised a workable strategy for addressing them effectively in the field.

The challenge now facing the Commission is to develop creative, effective and feasible approaches for dealing with the topics at hand (personnel, the community - and later programmatic options) and to launch the process that will bring across-the-board improvement and change.

### III. SOME UNDERLYING ASSUMPTION

1. To respond to the above challenge it is necessary to demonstrate that the personnel and community options can indeed be acted upon in the comprehensive manner that they were formulated. For personnel this involves recruitment, training, retention and profession-building. For the community this involves recruiting outstanding leadership, changing the climate and generating significant additional funding.

2. It is difficult to meet this challenge on the national level because it is too complex and too vast.

3. On the other hand there is good cause to believe that it could be undertaken on the local level, for the following reasons:

a. much of education takes place only on the local level

b. the scope of a local undertaking that would be comprehensive could be manageable. There is sufficient energy and there are enough people to undertake such a project.

c. The results of a local undertaking would be tangible and visible and could generate interest and reactions that might lead to a national debate on the important issues of Jewish education.

d. a local project could be managed in a hands-on manner. Therefore it could be constantly improved and fine-tuned.

e. there are ideas and programs (best practice) that if brought together, integrated and implemented in one site could have significantly greater impact than they have today when implementation is fragmented. The whole is greater than the sum of its parts.

f. visions of Jewish education could be translated and experimented with in a limited and manageable way.

g. national institutions and organizations could be mobilized for such experimental programs. They would view this as an



opportunity to test and develop new conceptions for Jewish education.

h. people could be recruited and mobilized for tangible local demonstrations. The pool could be expanded to include - in addition to the current cadre of outstanding educators :

1. Rabbis
2. Scholars of Judaica (Twersky, etc)
3. Federation executives
4. Jewish scholars in the humanities and sciences (Scheffler, Schon, Lipsett, Ginzburg, etc...)

4. Local sites could be networked for greater impact.

5. Working on the local scene could take advantage of working both from the "bottom-up" and from the "top-down".

#### IV. BRINGING ABOUT CHANGE

##### A. From Options to Community Action Sites

The theoretical basis for undertaking the personnel and community options has been debated by commissioners, staff and outside experts. Though the deliberation will continue throughout, the Commission decided the time has come to deal with the translation of these options into programs and projects.

A number of assumptions have guided our work as we have begun to consider implementation:

1. The community and personnel options are interrelated and a joint strategy involving both must be devised. Indeed, dedicated and qualified personnel is likely to affect the attitude of community leaders towards education. Similarly, if the community ranks education high on its list of priorities, more outstanding personnel is likely to be attracted to the field.

2. Dealing effectively with the personnel issue will probably require a comprehensive approach: recruitment, training, profession-building and retention will all have to be dealt with simultaneously.

3. In addition to the complex package of initiatives and interventions required by (1) and (2) above, the issue of the time necessary to introduce change will have to be addressed. This will require deciding on an appropriate balance between

short, medium and long-term results.

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4. All key stakeholders will need to be appropriately involved from the very beginning of this process. This includes commissioners, national organizations and institutions, local organizations and institutions, professionals (local and national), and funding sources.

5. Significant questions concerning innovation and implementation of the two enabling options - and of the programmatic options when they will be addressed - can only be resolved in real-life situations, through the dynamics of thinking for implementation, and in the actual act of implementing.



6. For all these reasons, we suggest that the Commission work with communities that wish to become Community Action Sites where we can deal with the community and personnel options.

7. By Community Action Site we mean a site (a community, a network of institutions, one major institution, etc.) where some of the best ideas and programs in Jewish education would be initiated in as comprehensive a form as possible. It would be a site where the ideas and programs that have succeeded, as well as new ideas and experimental programs, would be undertaken. Work at this site will be guided by a vision of what Jewish education at its best can be.

9. The assumption implicit in the suggestion of a Community Action Site is that other communities would be able to see what a successful approach to the community and personnel options could be like, and would be inspired to apply the lessons learned to their programs, in their own communities.

#### **B. From Community Action Sites to a Mechanism for Initiatives in Jewish Education**

1. As Community Action Sites were being considered, a number of questions and issues related to their implementation arose:

2. Implicit in the notions of change, innovation, new initiatives, demonstration, is the assumption that one knows what should and can be changed and demonstrated. However, at this time some of what should and can be changed, innovated, demonstrated in Jewish education needs to be developed or created.

3. Programs for implementation are seldom successful when they are "top-down" programs. Communities must play a major role in the initiation of the idea, they must be full partners in the design of programs and in their implementation.

4. Numerous questions need to be addressed in considering the Community Action Sites approach: Who will undertake the strategic thinking? Who will plan and ensure that the standards and goals of the Commission are maintained? Who will actively accompany the ideas through their stages of development and implementation? Who will deal with the unresolved issues as they arise in implementation? Who will see that things work, and that they can be replicated? Who will consider issues of change and replication of change throughout the universe of Jewish education?



5. A strong case exists for initiating change through Community Action Sites. However, as the above issues were being considered by the staff -- in extensive consultation with experts -- it became clear that a means, a mechanism, is needed to deal with Community Action Sites. A way to mediate between ideas and implementation needs to be devised.

6. The possible role of this mechanism can be illustrated by way of an analogy borrowed from industry: the mechanism will be analogous to the unit that designs, develops and builds the prototype of a new product, improving upon it until that product works. When problems and issues arise during the process of constructing the prototype, they are dealt with and resolved in the unit. Lessons learned from implementation are absorbed and used to change, adapt and modify the product; the product is adapted to specific local needs, etc.

7. It is therefore suggested that a mechanism for implementation be created to be called (for lack of a better name at this time) the mechanism for "Initiatives in Jewish Education" (IJE).

#### IV. THE MECHANISM FOR INITIATIVES IN JEWISH EDUCATION (IJE)

##### A. The Mission

1. The IJE will be a free-standing mechanism for the initiation and promotion of change and innovation in Jewish education. As such, it should be a center guided by vision, together with rigorous work and creative thinking. If successful, it will be a source of ideas, characterized by an atmosphere of ferment, search and creativity. It will be the driving force for systemic change.

2. The IJE will design and revise development strategies - generally in concert with other persons and institutions. It will be a full-time catalyst for development efforts for Jewish education.

3. The IJE will undertake the assignment of creating Community Action Sites. These Community Action Sites will deal minimally with the two enabling options - where personnel will include: recruitment, training, profession building and retention, and community will include : bringing strong leadership into Jewish education, changing the climate and generating additional funding for education. Through personnel and the community, it will also be dealing with programmatic



options, e.g. as it recruits and trains personnel for early childhood programs, for the day schools, for informal programs, etc.

4. The goal of the Community Action Site is to bring about major change in the quality of Jewish education in that Site, through a successful approach to the options of personnel and the community. The importance of a site resides both in the possibility to effect and demonstrate change there, and in being the basis for inspiring change elsewhere.

5. The Community Action Site will be a joint endeavour of an interested local community and the IJE. The IJE will assist, if needed, in setting up the local mechanism (local IJE) that will undertake responsibility for the Community Action Site. Each Site will have its local mechanism. Together, the local mechanisms will network for the promotion of change and the diffusion of innovation. The IJE will act as facilitator to create a network of such local mechanisms.

6. Conditions are bound to change as a result of the work of the IJE. As work proceeds, existing institutions may want to respond to emerging needs. The IJE may cause new institutions to be established - when no viable alternative exists.

7. In addition to this initial focus on Community Action Sites, the IJE will assist funders, as appropriate, in moving ahead with programmatic options in which they have an interest by acting as a consultant and professional resource. The IJE will be a central address for funding sources and for institutions who wish to work cooperatively with the IJE in their own development efforts. It may also help local IJE's find funding for their initiatives.

8. Much of the definition of the IJE will evolve during the actual process of implementation.

## **B. The IJE At Work**

The following is one possible scenario of the IJE at work:

### **1. Staff and Governance**

a. The IJE will be a free standing mechanism. It will have a staff to perform multiple functions and will be governed by a Board of Trustees (see Appendix 1).

b. There will be a director, responsible for all of the work of the IJE. He/she will be an outstanding, high-level professional, committed to Jewish continuity, knowledgeable of the Jewish community of North America. He/she may be an educator, a manager, or both (to be determined.)

c. In addition to the director, a team of outstanding professionals will staff the IJE (size and composition to be determined).

d. Governance of the IJE will be in the hands of a board composed of lay leaders, scholars and professionals, blending experience, knowledge and financial strength.

e. The authority of the IJE will derive from the ideas that guide it and the prestige, status and effectiveness of its Board and staff.

## **2. Functions**

a. In order to meet the complex tasks involved, the IJE will undertake various functions. They will be linked organically and will complement each other. They may include:

- i. research, data collection, planning and policy analysis;
- ii. community interface (for demonstration sites);
- iii. funding facilitation;
- iv. monitoring, evaluation and feedback;
- v. diffusion of innovations.

b. The work of the IJE will be guided on an ongoing basis by the vision, the educational content and the philosophy contained in the final report of the Commission. To insure the above ongoing inputs will be received from the staff of the IJE, consultants throughout the world, institutions, scholars and community leaders. A Professional Advisory Board will be established to stimulate this activity.

c. Some of the content and rationale for items i-v above include:

### **i. research, data collection, planning and policy analysis**

\* This may be viewed as the research and planning arm of the IJE. It will improve and maximize the knowledge-base upon which decisions for Jewish education are made. The work may be commissioned, done in-house or others may be encouraged to do various parts. The necessary data bases will be created here; major issues will be studied, key questions will be researched



(e.g. create inventories of Jewish educational resources; undertake needs analyses; set norms and standards for training; assess the quality of existing training; analyze community structures in relationship to Jewish education, etc.).

\* To provide the analysis needed for informed decisions. (E.g. What are relevant criteria for the selection of Community Action Sites? What is the nature of the problem/s in that site? What are the political and institutional givens relevant to change in the Community Action Site? Who are the stakeholders and how can they be involved? What are the financial and financing possibilities?)

\* To provide the knowledge and planning support needed and wanted by the Community Action Sites; to work with the local IJE in the Community Action Sites and provide expertise that may be needed; to help ensure the level and quality of the work intended.

\* To be the arm of the IJE for planning and strategic thinking. It is here that development plans will be designed and strategies will be defined and revised on an ongoing basis. This work will extensively involve other persons and institutions.

#### **ii. community interface (for Community Action Sites)**

\* The IJE will work extensively with the communities where Community Action Sites are located. It will do so by means of local mechanisms that will be established.

The community interface function may deal with:

\* Initiation of negotiations with relevant stakeholders and community leaders about undertaking the process of becoming Community Action Sites.

\* Help the local community establish a mechanism for its Community Action Sites and assist in recruiting staff for such mechanisms.

\* Ongoing facilitation during implementation - as needed (e.g. assistance in negotiations with national training institutions, universities, organizations, etc.). The IJE staff will be proactive in its support of the local management of the Community Action Sites. Relevant IJE staff will maintain ongoing contact with the local team.

#### **iii. funding facilitation**

This function may include the following:

\* To undertake as appropriate, brokering between various possible sources of funding (foundations, national organizations,

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local sources of funds, federations, individuals) and the Community Action Sites.

- \* To be a central address both for funding sources and for relevant institutions who will seek guidance in accomplishing their objectives.

- \* To seek to link high priority pieces of work with various funders and competent implementors.

- \* To assist funders in moving ahead with programmatic options in which they have an interest, acting as a consultant, and providing professional assistance as appropriate.

#### **iv. monitoring, evaluation and feedback**

The purpose of this function is threefold:

- \* To monitor activity of each Community Action Site.

- \* To evaluate - in whatever form or forms deemed most relevant - the progress of Community Action Sites.

- \* To create and activate feedback loops to connect practical results with a process of re-thinking, re-planning and implementation.

#### **v. diffusion of innovation**

The goal of the Commission on Jewish Education in North America is to bring about across-the-board systemic change in Jewish education, by initially dealing with the areas of personnel and the community. The IJE will deal with the complex issue of the diffusion of innovation from one or more Community Action Sites to many or all communities. Strategies will be devised to maximize change throughout the community.

### **3. Organization of Functions**

In order for each of the above five functions to be given the attention needed, and that none be overwhelmed or overtaken by pressing needs of other functions, they should probably be structured as distinct units. The staff of any one may be as small as a part-time person or as large as a full team - as needed - however each function should have autonomous importance and authority.

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**4. How will the IJE begin its work?**

a. Once the notion of an IJE is adopted by the Commission, a comprehensive plan will be developed to launch the IJE. At the appropriate time a Board will be constituted and a director will be hired.



April 13, 1989

From: Morton L. Mandel

To: Seymour Fox

Here are some more thoughts on possible outcomes of the Commission on Jewish Education. Let's discuss on April 18th telecon.

Outcome #1 The IJE (1.1.)

Outcome #2 Community Action Sites: From Demonstration to Implementation

Organized or assisted by IJE, these would be partnerships and coalitions of local and continental bodies, generally under the local Federation flag, to test programs, leading to diffusion.

Outcome #3 Personnel: Building a Profession

A permanent ongoing process led by IJE, with multiple demonstration and pilot projects, to develop and test methods that facilitate personnel recruitment, training, and retention (generally performed at Community Action Sites).

Outcome #4 Federation: A key factor for Jewish continuity

An organized, long-term effort to achieve consensus that the local federation is the key convenor and sponsor of local programs to enhance Jewish continuity (e.g., Cleveland Commission). IJE to work closely with CJF to activate federations to take up this cause.

Outcome #5 The North American Support System: A New Design

A permanent process led by IJE and CJF to harmonize all the continental players (JWB, JESNA, Seminaries, etc.), in a way that brings them to a high level of effectiveness, overall or in selected areas.

Outcome #6 Programmatic Options: Implementation

A permanent ongoing process led by IJE to work with "champions" of programmatic options, as they can be identified, to develop fully those options:

1. - Champion is Chair of a Commission (e.g. Eli Evans)
2. - Champion finances Commission or obtains financing)
3. - IJE helps select and approves all Commission members
4. - IJE helps select and approves Commission staff
5. - IJE monitors and exercises quality control on each Commission

Outcome #7 Research, Publications, etc.

A permanent ongoing element of IJE. (To be designed).

April 13, 1989

TO: Annette Hochstein

FROM: Joe Reimer

RE: Our conversation in Boston

A whole week has flown by and been filled with duties of the heart (family) and obligations at the office. I trust your trip home and adjustment were smooth. I admire your strength and persistence.

It took me two days after our conversation to realize that I was in shock from it. You warned me, but since I was captivated by your ideas, I didn't realize how much was involved or how far it took us from the IJE - where my mind was. I work slowly - because I do feel overwhelmed. But I listened carefully and am gradually unfolding what was said in an hour's conversation.

I'll be frank in declaring I cannot possibly do all that you asked of me. Much of the assignment is new to me - substantively and procedurally. I'm attracted intellectually, but scared emotionally. Also, I don't work at even half your pace and have a sixty percent commitment to Brandeis and very practical concerns about home and Pesach. I may not be the person for this job, I realize. But I will try to do the small part that I can - at a pace I can live with.

We were talking of five or six papers. Let me comment on each in a preliminary way.

1. State of the field. Let's build on the option papers and think of the field as being made up of clusters - such as day schools, supplementary schools, informal education, adult and family education, pre-school. Within each cluster we can generate a set of empirical, informational questions (who is serviced by whom in what contexts and ways) as well as directional questions (what are the recent trends, what are the descriptive worlds like). We may commission a paper for each cluster, with an editor to direct, synchronize and edit.

2. An organizational or institutional analysis of the field. As Woocher and Schiff claimed at our meeting, the "community" that encompasses Jewish education is complex. We need a carefully analysis of the institutional "system" of Jewish education: how the denominations, federations, BJE's, JCC's, schools and synagogues inter-relate, how that "system" has evolved over time and is changing, how it may differ locality to locality and what the implications are for a theory of change. We need to put on paper the complex maps that a Schiff carries in his head about these matters - in a historical and theoretical context.

Annette Hochstein  
P. 2, April 13, 1989

3. Jewish continuity and Jewish education. There is both an empirical and a conceptual piece here. Empirically what is the evidence about the relationship between receiving a Jewish education and manifesting Jewish behavioral commitments. Conceptually what are our assumptions when we link these two: what sorts of relationships do we envision? I'd think here of a sociologist and a philosopher each writing a paper.

4. Best practices. Here I have yet to think about the issue of criteria of selection (e.g., The Good High School) to learn from.

5. and 6. Enhancing the options papers on personnel and community. I think these are the crucial links because they begin to operationalize what we mean by the enabling options. I've yet to give it thought.

I'll be talking to people next week and communicating once before Pesach.





**Nativ Policy and Planning Consultants**  
Jerusalem, Israel

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ירושלים

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**FACSIMILE TRANSMISSION**

TO: ART NAPARSTEK  
FROM: ANNETTE HOCHSTEIN

DATE: APRIL 13, 1989

NO. PAGES: 1

FAX NUMBER: 001-216-391-8327

Dear Art,

We will try to call you today between  
1:00 - 2:00 p.m. Cleveland time.



Nativ Policy and Planning Consultants  
Jerusalem, Israel

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ירושלים

Tel.: 972-2-662 296; 699 951  
Fax: 972-2-699 951

FACSIMILE TRANSMISSION

TO: ART NAPARSTEK & GINNY LEVY  
FROM: ANNETTE HOCHSTEIN  
FAX NUMBER: 001-216-391-8327

DATE: APRIL 10, 1989  
NO. PAGES: 4

RE: Meeting with Esther Leah Ritz

I had a long meeting with Esther Leah Ritz on the 5th of April 1989. The substance of that meeting dealt with MI-G. It was not possible for me to take up MI-NA, the way we would have liked it discussed. Therefore, I will have to see Esther Leah before the next Commission meeting, or we will have to find some other way to involve her towards the next Commission meeting. As you may recall, she could not attend the 2nd Commission meeting. I briefed her following that meeting.

Best regards,

*Annette*

1846



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TYPE (USING DOUBLE SPACES) OR PRINT CLEARLY

TO: SEYMOUR FOX  
NAME ANNETTE HOCHSTEIN  
COMPANY NATIV  
STREET ADDRESS \_\_\_\_\_  
CITY, STATE, ZIP JERUSALEM  
PHONE NUMBER \_\_\_\_\_

FROM: \_\_\_\_\_  
NAME ARTHUR NAPARSTEK  
COMPANY PREMIER  
DEPARTMENT \_\_\_\_\_  
COST CENTER 090

TELEX NO.: 6873015 PREMI UW

FAX NO.: 2163918327

TIME SENT:

## MESSAGE:

Seymour and Annette,

Could you get me a more precise budget for your operations in Israel.

Art

AMERICAN JEWISH  
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APR 12 '89 14:35

PREMIER CORP

PAGE.01



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NAME SEYMOUR FOX  
COMPANY NATIV  
STREET ADDRESS \_\_\_\_\_  
CITY, STATE, ZIP JERUSALEM  
PHONE NUMBER \_\_\_\_\_

FROM: \_\_\_\_\_  
NAME ARTHUR NAPARSTEK  
COMPANY PREMIER  
DEPARTMENT \_\_\_\_\_  
COST CENTER 090

TELEX NO.: 6873015 PREMI UW

FAX NO.: 2163918327

TIME SENT:

## MESSAGE:

Annette and Seymour:

Annette, I followed up on Debbie's and Ms. Kaplamb's check. They were mailed from Federation on March 30th. Let me know if they do not arrive.

I had a good talk with Reimer. Need to debrief both of you on Thursday or Friday. Let's set a time.

I received the suggested schedule. It looks good. I'll review it and get back to you.

FAX SENT

DATE:

12.4.89

Nativ Policy and Planning Consultants  
Jerusalem, Israel

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FACSIMILE TRANSMISSION

TO: ART NAPARSTEK  
FROM: ANNETTE HOCHSTEIN

DATE: APRIL 12, 1989

NO. PAGES: 5

FAX NUMBER: 001-216-391-8327

Dear Art,

It was nice speaking with you yesterday. As promised, Seymour, Debbie and I finished the suggested interview schedule for the Wednesday deadline.

Regarding our conversation, payments arrived.

Best Regards,

Annette

P.S. We think you should inform HUC - Gottshalk's secretary ~~know~~ that the meeting will not be there. No one will be insulted. (definitely)  
We DO think the BJE unsuitable for the meeting!

Regards

A.



TOWARDS THE THIRD COMMISSION MEETING:

INTERVIEW OF COMMISSIONERS  
SUGGESTED SCHEDULE

203 BM

1. The purpose of this interview is to bring the commissioner up to date on the developments since the second meeting of the Commission. These developments can be seen in the following stages, which might serve as a framework for structuring the interview:

- a. Much work has been done since December 13th (meetings of the planning group and the senior policy advisors, consultations with experts, etc.).
- b. How we moved from the personnel and community options to the notion of demonstration center/community action site - doing it in the field. The Commission, we felt, agreed to these options on the condition that ideas, projects and programs could be developed and implemented that would make a difference and lead to systemic change.
- c. As we did this we had to grapple with difficult questions such as: Who will carry out the work? Who could be responsible for the implementation of demonstration projects?
- d. For all of this, we need input from the commissioners.

2. A sample of interviews conducted recently revealed that different commissioners have very different conceptions of how the Commission is proceeding; the interview will have to be adapted to the individual situation. Although the concept of the IJE is still tentative, with some commissioners it might be desirable to cover the major ideas behind it. With others it may be more useful to deal with the challenge of moving from the decisions of December 13th to the idea of community action sites. In interviews conducted until now, we have found that commissioners tend to concern themselves with particular issues of importance to them. For example, heads of training institutions may be mainly interested in the training component of a demonstration project, where foundation principals may want to understand how their foundation's specific area of interest can be addressed.

3. Irrespective of these differences, we suggest that the following points be covered with all commissioners. They may be presented as questions to which the response or views of the commissioner are sought:

- \* a. Review where we were at the end of the second meeting:
  - an agreement to go ahead on personnel and the community as first items (as enabling, as pre-conditions)
  - continued interest in programmatic options
  - some concern and possible skepticism as to how the personnel and community options can be implemented.
  
- \* b. We see the challenge for the next meeting of the Commission as answering the question of how to bring about significant, across-the-board change through personnel and the community.
  
- \* c. In thinking about implementation, we realized that because education takes place on the local level, we would have to get involved in the local scene. This would require some type of demonstration - a community, a network of institutions, or possibly one major institution where some of the best ideas and programs in Jewish education would be initiated in as comprehensive a form as possible. It would be a site where the ideas and programs that have succeeded, as well as new ideas and experimental programs, would be undertaken. Work at this site will be guided by a vision of what Jewish education at its best can be.

In a demonstration center, a community would have to grapple with such issues as: in-service training, the recruitment of educators, the status and salaries of its teachers. In a sense, Cleveland's Commission might be seen as a useful example of the beginning of a comprehensive approach, an important new development in educational planning and funding.

While education is mainly a local enterprise, we also realize that several factors will have to be dealt with nationally. For example, some training needs to be done on a regional or national level. Furthermore, across-the-board change can only be achieved if local change is implemented in enough places and becomes nationally accepted policy.

- \* d. The demonstration center idea leads to a crucial question: Who will do the work? Who will be responsible for the planning and execution of the demonstration projects? In trying to answer this question the idea is emerging that some form of team or mechanism that will enhance and facilitate implementation may be needed.



- \* e. You may want to discuss this issue with the commissioner in some detail and look at the functions that such a team or mechanism may fulfill.
- \* f. If a mechanism were to be established, it will be necessary to deal with issues such as:
  - What are the criteria for choosing a community action site? What should its size be? What are the important characteristics?
  - How do we guarantee that the projects are of the quality that the Commission aspires to?
  - How will negotiations with the existing institutions in the community be conducted? What kind of local mechanism will need to be established to run the community action site?
  - How will appropriate funding sources be matched with specific projects?
  - What kind of monitoring and evaluation should accompany the implementation of projects? How can feedback be effectively incorporated into the ongoing work?
  - How will innovations be diffused from one community action site to other communities?
  - How will a central mechanism work with local communities to help them rise to their full stature without imposing something on them from the top down?
- \* g. You may want to remind the commissioners of what the Commission has already achieved - in two meetings and eight months:
  - Created a pluralistic, private/communal forum for dealing with the issue of Jewish education-Jewish continuity;
  - Charted out what the commissioners perceive as the major areas in need of intervention and development (options);
  - Differentiated between programmatic and enabling options: start with enabling but link to programmatic.
  - Is beginning to consider what content (for personnel and community) and mechanisms are needed to bring about significant change and improvement.



- \* h. It is important to emphasize that we need the commissioners' input concerning each of the elements mentioned above.
- \* i. Check attendance on June 14.



FAX SEN

DATE:

11.4.89

נתיב יועצים

DATE:

תאריך

תיק

Nativ Policy and Planning Consultants  
Jerusalem, Israel

נתיב-יועצים למדיניות ותכנון  
ירושלים

Tel.: 972-2-662 296; 699 951

Fax: 972-2-699 951

FACSIMILE TRANSMISSION

TO: Joseph Reimer, Hornstein Program

FROM: Debbie Meline

FAX NUMBER: 001-617-736-4724

DATE: April 11, 1989

NO. PAGES: 2



April 11, 1989

Dear Joe,

'Tis the season for making seder. My pre-Pesach house (office) cleaning has included a search for loose "crumbs" in the MI-NA files, minutes and memos.

I thought it may be useful for you if I told you what I found in the Options file. We have four half-baked (i.e. drafts that have yet to be corrected and approved) options:

- knowledge base
- early childhood age group
- young adults
- elementary age group

The option papers that still need to be written are:

- college age group
- retired/elderly age group
- Hebrew language
- eliminate tuition
- physical plant
- innovations in Jewish education

I will work with Prof. Fox on amending and editing the former group, and I believe that you are responsible for drafting the latter. Also, the personnel and community options need to be revised in light of the IJE idea.

I wish you and your family and the Hornstein gang a chag kasher v'sameach.

Warm Regards,



Debbie

1839 ✓



FAX SENT

DATE: 10.4.89

Nativ Policy and Planning Consultants  
Jerusalem, Israel

נתיב-יועצים למדיניות ותכנון  
ירושלים

Tel.: 972-2-662 296; 699 951

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FACSIMILE TRANSMISSION

TO: PROF S. FOX  
FROM: Annette Hochstein  
FAX NUMBER: 322211

DATE: 10/4/89  
NO. PAGES: 4

Dear Seymour,

The fruits of this morning's laban.  
I promised Art that he would  
receive this tomorrow.

A.

66 I

*Supervisor*

TOWARDS THE THIRD COMMISSION MEETING:

INTERVIEW OF COMMISSIONERS

SUGGESTED SCHEDULE

1. The purpose of this interview is to walk the commissioner through the process from where the second Commission meeting ended to our practical suggestions on implementation.

2. A sample of interviews conducted recently reveals that different commissioners have very different conceptions of how the Commission is proceeding; the interview will have to be adapted to the individual situation. With some commissioners it will be possible and desirable to cover the major ideas of the IJE. *young from Dec 13 To see challenge of IJE* With others it may be more useful to remain with the illustration of demonstration projects. *might* Heads of training institutions may be mainly interested in the significance of the training component for their institutions; foundation principals may want to understand how their foundation's specific area of interest can be addressed. *challenge*

3. Irrespective of these differences, we suggest that the following points be covered with all commissioners. They may be presented as questions to which the response or views of the commissioner are sought:

- \* a. Review where we were at the end of the second meeting:
  - *limited go-ahead* on personnel and the community *as far as items*
  - *individual* interest in programmatic options
  - some skepticism as to how these good ideas can be implemented *personnel of city*

- \* b. We see the challenge as answering the question of how to do this: how to bring about significant, across-the-board change in personnel and the community. *for the next meeting of the commission*

*through*

\*\*\* you may choose to elaborate on each of these elements

- \* c. First we thought about demonstration centers: illustrate what personnel and the community could mean in a demonstration center. Use both the options papers and the ii - IJE paper to assist you. Explain what the role of national training institutions could be; how personnel can only be implemented locally (as that is where educators work) and can only be implemented in programs (thus the programmatic implications of personnel). However personnel training needs to be regional or national.

Further illustration could include : improving the status of teachers could involve increased salaries. This may require developing local federation funds for

education. Use the example of the funding of Cleveland's Commission as an example of important new developments.

- \* d. Discuss the strengths and weaknesses of the demonstration center idea (see the IJE paper). Issues that arise before starting -e.g. how large should a demonstration center be? What should the characteristics of the community be? How important is the time factor? Is there a major university in the vicinity? What about major metropolitan areas? etc.
- \* e. Explain how the absence of a link between ideas and implementation is always the stumbling block in education.
- \* f. Explain the need to translate the idea into a design for implementation and then into actual implementation; to correct the idea on the basis of what is learned in implementation and then to re-design implementation.
- \* g. Introduce the analogy of the prototype: the need for a team - a mechanism - that will develop the prototype.
- \* h. The possible functions of the IJE and their detail. (See ~~IJE chart and paper~~) *Detail*
- \* i. ~~Key issues:~~  
*how do we make sure that*
  - Working with local communities rather than imposing a ready-made plan on them.
  - The IJE does not deliver services. It does not replace national institutions; rather, it is a resource for their development.
- \* j. You may want to remind the commissioners of what the Commission has already achieved - in two meetings and eight months:
  - Created a pluralistic, private/communal forum for dealing with the issue of Jewish education-Jewish continuity;
  - Charted out what the Commissioners perceive as the major areas in need of intervention and development (options);
  - Differentiated between programmatic and enabling options: start with enabling but link to programmatic.
  - Has begun to design mechanisms for bringing about significant change and improvement.



- \* k. Check attendance on June 14





PREMIER INDUSTRIAL CORPORATION

## REQUEST FOR TELEX/MAILGRAM/FAX

72343 (REV. 2/88) PRINTED IN U.S.A.

SPECIFY HOW TO SEND MESSAGE

DATE REQUESTED

4/14/89

☐ TELEX NO.☐ MAILGRAM☒ FAX NO. 9722699951NO. OF PGS. 25  
(INCL. COVER SHEET)☒ URGENT - Time sensitive - must go at once☐ REGULAR - Send at time rates are most economical

TYPE (USING DOUBLE SPACES) OR PRINT CLEARLY

TO: SEYMOUR FOX  
 NAME ANNETTE HOCHSTEIN  
 COMPANY NATIV  
 STREET ADDRESS  
 CITY, STATE, ZIP JERUSALEM  
 PHONE NUMBER

FROM: ARTHUR NAPARSTEK  
 NAME  
 COMPANY PREMIER  
 DEPARTMENT  
 COST CENTER 090

TELEX NO.: 6873015 PREMI UW

FAX NO.: 2163918327

TIME SENT:

## MESSAGE:

Seymour & Annette,  
 I look forward to speaking with you on Sunday at  
 11:30 or 1:00 P.M. <sup>EST</sup> We are having a draft of what could  
 become VCU's letter to Commissioners. Could you  
 work on it, if necessary make changes, I would like to get  
 it to them on Monday.  
 Also, I have the essay Peter Szanton did on intermediaries.  
 It came in today (4/14). I've put aside my concept  
 paper. This is ~~much~~ better. I am also sending his resume.  
 Best regards  
 Art



1800

4/14/89 DRAFT (commletter)

Letter to Commissioners from MLM

141 BM

With the third meeting of the Commission less than two months away (June 14, 10 a.m. to 4 p.m., \_\_\_\_\_ place ), I would like to bring you up to date on developments since the meeting of December 13, 1988. Staff members have been hard at work developing ideas put forth at that meeting. They have consulted with experts in the field and met with the Commission senior policy advisors and are now anxious to consult with you in preparation for June.

At the last meeting of the Commission a number of options were considered. The Commission opted to focus its work initially on two topics: (1) the shortage of qualified personnel for Jewish education and, (2) the community--its structure, leadership, and funding as keys to across-the-board improvements in Jewish education. At the same time, many commissioners urged that work also be undertaken in various programmatic areas i.e., early childhood, day schools, supplemental schools, the Israel experience, etc.

The challenge facing us now is to develop creative, effective, and feasible approaches for dealing with the enabling options of personnel and community in relation to various programmatic areas. We need to devise a workable strategy so that we can demonstrate that personnel and community can indeed be acted upon in a comprehensive manner. In personnel this involves recruitment, training, retention, and profession building. For the community, it involves recruiting outstanding leadership, changing the climate, and generating significant additional funding.



As the work of the staff, policy advisors and others has unfolded, several assumptions have guided our deliberations. We now believe it is difficult to meet the challenge of change on a national level alone because the field of Jewish education is too complex and vast. We need to look at a strategy that allows us the flexibility to work both from a top down as well as a bottom up perspective. A number of experts in the field believe that real change must be undertaken on the local level. It is argued that local initiatives make sense for the following reasons:

1. Much of education takes place only on the local level.
2. The scope of a comprehensive local undertaking would be manageable; there is sufficient energy and enough people to undertake such a project.
3. The results of the local undertaking would be tangible and visible and could generate interest and reactions that might lead to a national debate on the important issues of Jewish education.
4. A local project would be managed in a hands-on manner, permitting constant improvement and fine-tuning.
5. Ideas and programs, when integrated and implemented in one site, can have significantly greater impact than they have today when successful approaches are isolated. The whole is greater than the sum of its parts.
6. Visions of Jewish education could be translated and experimented with in a limited and manageable way.

7. National institutions and organizations could be mobilized for such experimental programs. They would view this as an opportunity to test and develop new approaches to Jewish education.
8. People could be recruited and mobilized for tangible local demonstrations. The pool could be expanded to include, in addition to the current cadre of outstanding educators, (1) rabbis, (2) scholars of Judaica, (3) federation executives, (4) Jewish scholars in the secular and academic world.

Thus, we have moved from the personnel and community options to the notion of developing initiatives on local sites. At its December meeting, the Commission agreed to the conceptual framework of enabling and programmatic options on the condition that ideas, projects, and programs could be developed and implemented that would make a difference and lead to systemic change. The assumption implicit in utilizing local sites is that other communities would be able to see a successful approach to the community and options, and would be inspired to apply the lessons learned to their own communities.

Implementation are seldom successful when they are top down  
communities must play a major role in the initiation

Page 4

of the idea. They must be full partners in the design of programs and in their implementation. Thus, as we are developing these ideas, we have to grapple with such difficult questions as: Who will carry out the work? Who will undertake the strategic thinking? Who will plan and ensure that the standards and goals of the Commission are maintained? Who will or can be responsible for the implementation of local projects? For all of this, we need input from the commissioners.

Therefore, I believe that it is important for us to respond to these ideas and consider our next steps together. At the suggestion of a number of Commissioners, we propose to follow the individual interview format which we have used in the past. I have asked staff to set appointments with each of you to get your thoughts. Your thinking is crucial as we begin to develop the agenda for the June 14th meeting.

I know that most commissioners share my belief that a mechanism for change is a critical outcome of this Commission. I look forward to learning, through the interview process, your thoughts on the direction we propose.

Sincerely,

Morton L. Mandel



BY: PETER SZANTON

1

## THE INTERMEDIARIES - SOME EARLY OBSERVATIONS

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With Foundation support, I have undertaken a brief reconnaissance of the field of so-called intermediaries. I have visited the offices, interviewed key personnel and read a variety of materials by and about High/Scope, the Manpower Demonstration Research Corporation, the Police Foundation, Public/Private Ventures, the RAND Corporation (as to its Housing Allowance Supply Experiment work only), the Remediation and Training Institute, and the Vera Institute of Justice. I have also reviewed much of the recent literature on social experimentation, and some of the voluminous writings on the relation of knowledge to policy.

The purpose of this work was mainly to determine the kind of effort required to produce a useful book about those institutions. The book would specify their purposes, sketch their histories, and assess their contributions to knowledge, to social policy and to program operation. It would also attempt to elicit from their experience some lessons about the deliberate development of policy-relevant knowledge, about barriers to the use of such knowledge and about possible future evolution of the roles of intermediaries. Accordingly, the products of the reconnaissance were to be an outline of the proposed book, a workplan, schedule and budget for producing it, and an essay setting out some hypotheses and observations that the book might much more fully test.

What follows is that essay. It groups its observations under four general headings: traits the intermediaries share, dimensions in which they differ, the form and degree of their impact, and questions about their future. Because these comments flow from a brief review of eight distinctive institutions by an observer previously unfamiliar with most of them, it will not advance the understanding of those who have followed those institutions closely. Nor can it be depended on to forecast the final judgments of the book. Those judgments would certainly be more numerous, more fully informed, and perhaps quite different. But the essay will at least suggest some of the concerns and presumptions on which the next stage of the work would be based.

# I. THEY HAVE MUCH IN COMMON

a. Similar ends and means. Each of the intermediaries are not-for-profits whose purpose is to help identify effective ways of resolving or ameliorating significant social problems, and which serve that purpose, at least in part, by:

- (1) designing and operating (or supervising the operation of) experiments or demonstrations of some scale;
- (2) subjecting the results of the experiments or demonstrations to more or less rigorous evaluation, and
- (3) disseminating the results. *all three.*

They may act autonomously and directly, or in collaboration with others, or indirectly through others - evaluation subcontractors, for example - but they have normally taken some responsibility for all three kinds of activity.

b. Recency. All are creatures of the last quarter-century. Vera was formed in 1961; High/Scope effectively in 1962 (though not formally until later); The Police Foundation in 1970; MDRC in 1974; P/PV in 1978; RTI in 1982-83. RAND, though founded in the late 1940s, began the Housing Allowance Supply Experiment (hereafter HASE), its first such venture, in 1973. All of these organizations, in short, are products of a period in which the US was becoming conscious of social problems which were not yielding to the general rise in incomes, not yielding much even to a very rapid rise in federal social expenditures, and whose roots, therefore, seemed deep, probably intertwined, and difficult even to clearly identify.

Equally, that history means that, on average, the intermediaries have been operating for roughly a decade and a half. And since much of their work has involved longitudinal studies whose results were not available until well after their founding dates (the most striking results from High/Scope's Perry Preschool Project, for example, were published in 1984) the time that most of them have had to affect events has been considerably shorter. Given the inevitably slow pace of significant social change, one implication of that fact is that, while interim judgments on these organizations may be timely and useful, no full assessment of their impact will be possible for many years.



c. Lengthened Shadows. Most of the intermediaries strongly confirm Emerson's dictum that an institution is the lengthened shadow of a man. Though most have by now undergone, and survived, transitions in leadership, many began by being inseparable from the concerns and entrepreneurship of unusual individuals. High/Scope, Vera and RTI are each organizations hard to imagine apart from their founding directors. HASE is similarly inseparable from the analytic concerns and policy interests of Jack Lowry. Several of the other intermediaries would not have come into being except for the entrepreneurial sponsorship of a single foundation executive. (Vicki Sandoff)

d. Motivating Values. Though all of the intermediaries, in lesser or greater degree, design and operate experiments and perform analyses, none were established by persons who thought of themselves principally as social scientists or whose objective was simply the advancement of knowledge. The end objective of all of the founders, and seemingly of all other key personnel, was to alter and improve social policy, and especially to improve the situation of the nation's disadvantaged. This is not to say that all of the intermediaries had or have policy agendas of their own. Some do and some do not, a point we return to below. But all see the goal of their work as the amelioration of a social problem. It is therefore fair to test their achievements - preliminarily, and among other tests - in terms of the degrees of amelioration being achieved.

## II. THEY ALSO DIFFER

Nonetheless, there are important differences among them.

a. Style of Operation. Worth noting, though not of fundamental concern here, is the fact that the intermediaries vary widely in their style of operation and in other internal respects. Some, for example - like Vera - began under very modest auspices and with diminutive resources; others with huge endowments (Police Foundation.) One was incubated for years in a county school system; most began as independent entities with substantial private - typically Ford Foundation - support. Most depended heavily on federal funding (and were severely tested by the cutbacks of the first years of the Reagan administration: High/Scope and P/PV lost 40% of their staffs; MDRC dropped 70%), but others did not.



In other internal respects they vary also. The boards of some, like MDRC, have played active and important roles. Other boards have been much less involved, and one appears to have been only a formality. ~~Similarly, the management of some (Vera, for example)~~ has been highly decentralized, with a fair variety of staff entrepreneurship permitted or encouraged; others (like High/Scope) have been far more focussed in their interests and more centrally directed.

b. Clients and Audiences. More significantly, the clients and audiences of the intermediaries have differed, on at least two dimensions. One is that of local versus federal orientation. Though some (HASE, MDRC) have been mainly oriented toward federal issues, others (Vera, High/Scope) began, at least, by seeking local impact in a single jurisdiction. Others (Police Foundation, RTI and in recent years P/PV and MDRC) have worked with multiple local jurisdictions.

The other dimension can be roughly characterized as policy versus operations. The work of some of the intermediaries has been oriented toward broad policy concerns, and hence largely toward legislative action. HASE was a clear example. It required specific congressional authorization and its own appropriations before it could begin, and it was designed to inform a central issue in a continuing congressional debate over federal housing policy for the poor: whether rents rather than new construction should be subsidized. Much of Vera's early work, on the other hand, tested operational approaches that New York City court or police administrators could implement essentially in their own discretion. RTI appears at the far end of this spectrum, showing no interest in policy, but attempting to affect practice directly, massively and at many sites.

c. Analysts and Advocates. The dominant value of some of the intermediaries is to learn; to distinguish what works, what doesn't and, where possible, why. These organizations care about what governments do, but the form their caring takes is to try to inform future policy-making. They see themselves essentially as analysts. For them, the knowledge that a policy will not produce the expected results, though unfortunate, is virtually as valuable as the knowledge that it will. MDRC is probably the clearest example of the type; HASE also fits it as well.

The dominant value of others, explicitly or otherwise, is to move policy in a particular direction. They believe some innovation will improve matters. Like High/Scope or Vera they may themselves ~~have pioneered that innovation. They want to demonstrate that it~~ works. Or, as with some Police Foundation projects, they may hope to demonstrate that a traditional policy is not effective. In either event, though they may - typically will - design and operate the experiment with great care, they are not indifferent to the outcome. Surprisingly, that fact does not seem to generate, among either the intermediaries or their clients and audiences, much concern about conflicts of interest or unreliable reporting. The reasons are probably that standards of methodological care have generally been maintained, and that even flawed experiments, if squarely addressed to policy questions, are likely to provide considerably better evidence than existed before.

d. Locations on a Spectrum. Whether oriented toward policy or operations, toward local decision-makers or national, and whether devoted at heart to analysis or advocacy, intermediaries vary in the proportion of the spectrum of potential activities they cover, and in where, along that spectrum, they tend to focus. The spectrum consists of essentially the following activities:

- i. formulating a policy hypothesis
- ii. designing an experiment to test the hypothesis
- iii. operating (or supervising the operation of) the experiment
- iv. evaluating (or supervising the evaluation of) its impact
- v. disseminating results
- vi. advocating reform or innovation based on its results
- vii. providing technical assistance to others establishing similar programs
- viii. packaging the essential elements of the program to facilitate its replication.

(Further activities might well be added to this list but, as is, it appears to fairly cover the range of intermediaries' current behavior.)

Three observations: All of the intermediaries engage, at least somewhat, in most of the activities - at least numbers i-v. The balance of their effort has differed sharply, however, with MDRC and



HASE typically stressing the top and middle activities, and Vera and (especially) RTI the middle and bottom ones. Finally, all of the intermediaries, over their histories, have tended to shift focus ~~downward along that list, and in recent years have typically paid~~ increasing attention to disseminating results, making the case for acting on them and, to a lesser degree, offering technical assistance. And this has occurred not simply because the earlier functions necessarily take place first in any particular project; the main reason appears to be a growing consciousness that, in most of the policy arenas in which intermediaries operate, the binding constraint in recent years has not been ignorance as to what works, but inadequate political or bureaucratic support for what is known to work, or insufficient administrative capacity to make it work. We return to some implications of that fact at the end of this paper.

### III. THEIR IMPACT HAS BEEN SUBSTANTIAL

Overall, the intermediaries seem to have had substantial effects, of at least three kinds.

a. Development of Knowledge. Least surprising is that they have produced a large body of policy-relevant knowledge, Principally because of the work of intermediaries it is now authoritatively demonstrable, for example, that a variety of preschool programs, if well run, will produce long-term gains in both their students' later school performance and in their social behavior; that a full-scale housing allowance program will not substantially increase rents; that carefully supported transitional employment can prepare a substantial fraction of retarded persons for unsubsidized employment, and so forth. The intermediaries have produced, among them, at least half a hundred findings of the scale and import of those three; all in all an impressive body of policy-relevant, policy-useable knowledge.

b. Learning how to Learn. A closely related but distinguishable product has been a near-consensus on how studies of program impact should be performed. A decade and a half ago, time series data, comparison groups, and random assignment were all used in efforts to estimate program impacts. But all were subject to attack. The time series data normally available could not measure the impact of any but very large-scale programs and could not clearly distinguish the effects of those programs from other possible



influences. Comparison groups were justly criticized as likely to differ from each other in any of several ways that might account for differences in outcome between them. Random assignment, while ~~understood to be superior in theory, was thought to raise near-~~ insuperable problems of feasibility and fairness.

The intermediaries have used each of these techniques, along with others, and one result of their work has been to increase the sophistication with which each of them is now normally used. Another contribution has been their increasingly careful recording of the administrative practices and operating rules which successful projects employ and on which successful replication may depend. But probably their main contribution to the power of policy research has been the now well-developed recognition that random assignment experiments are feasible, that under most circumstances they are fair and will be accepted as fair by participating individuals and organizations, and that their results, so long as they have been managed with care, are authoritative. The findings of large-scale and professionally conducted random assignment experiments are not compromised by the methodological controversies that engulfed many of the policy studies of the 1960s. The work of High/Scope, HASE and, especially, MDRC is most responsible for that result.

And it is not a trivial result. From the first major federal social programs until at least the 1950s, the typical policy-setting pattern was to lunge directly from concept to program. Roosevelt's Civilian Conservation Corps is a good example. The intermediaries were established as it was becoming understood that when government intervened in a complex problem, ideas appealing in principle might work poorly or not at all, and at great expense. "Throwing money at a problem," in the phrase of the day, might be worse than useless; while doing no good it might also exhaust, for some time, the political and financial resources for doing anything else. The next most obvious step - to consult social scientists on the basis of their supposed existing expertise - did not help much. Policy-oriented scholars were likely to give opinions whether there was a scientific basis for them or not, and generally there was not, since large, careful studies directly on point and already concluded were extremely rare.

The obvious solution was that significant policy options be tested, and the tests evaluated with care, before large-scale programs were launched. But until the mid-1970s, it was arguable

that such tests might only delay matters while they proceeded and confuse matters afterwards, as advocates and their methodological advisers contested what had been proven. That position is now no longer arguable, a fact due largely to the work of the intermediaries and of considerable long-term significance to our political processes.

c. Affecting Events. "Information is to politics as bullets are to warfare," as a current Washington saying goes. Information matters. And other things being equal, the side with more and better information wins. Of course the trouble with that formulation, though it is perfectly accurate as far as it goes, is that a number of other things - political resources, funding constraints, bureaucratic inertia principal among them - supply the heavy artillery or nuclear weaponry of policy warfare, and they may not be at all equal. The result is that the manner and degree to which the kind of knowledge that intermediaries produce is used varies enormously, and the value of the influence it exerts fluctuates correspondingly. No overall assessment of the effect of that knowledge is possible here, but at least three differing kinds of impact are worth noting.

The first and most encouraging occurs where the implications of an intermediary's findings are consistent with what a political or administrative or legal system is prepared to do. There is little doubt, to take an obvious current example, that MDRC's work and welfare findings are substantially and helpfully impacting events at least in Arkansas, Maryland and California, and that they will strongly influence the next wave of federal welfare legislation. Our politics are eager for measures that promise to reduce welfare dependency, and MDRC offers the most authoritative evidence available as to how this might be done. Similarly, police shooting of civilians dropped markedly after a Police Foundation study questioned the extent of use of deadly force and the legal system proved ready to impose a rule drawing on its findings. And a high proportion of the pre-trial diversion programs operating in several hundred jurisdictions resulted from two Vera efforts to demonstrate that benefits could flow both to accused youth and to overburdened court systems from supervised work and study programs for young defendants who did not have serious criminal records.

A second category is exemplified by work which, at first glance, might appear to belong in the first. The sharply increasing public concern for the care of very young children has given great prominence to the results of High/Scope's Perry Preschool project.



Reciprocally, the strong and still growing national support for expanded pre-school education has been justified in significant part by the findings from that project. But political forces appear to be ~~skewing those findings as well as using them.~~ The Perry project served severely disadvantaged children, and its extended longitudinal reviews demonstrated that those children could be greatly helped by a broad-based remedial program. That knowledge is being used as ammunition in a campaign mainly designed to extend downward to all four and five-year olds (of which the Perry children were not representative) conventional preschool programs (of which Perry was not an example.) The underlying reason is the difficulty working mothers of small children experience in finding and affording adequate day care. The cause in whose interest the Perry findings are being misused is thus not a bad one, but neither does it illustrate an exemplary relation between knowledge and action.

A third category is suggested by the use made of HASE. The experiment began in 1973 and, together with associated experiments, was to run for ten years. There was then fair agreement that federal housing dollars were conferring large benefits on relatively small numbers of poor (and middle-class) people, no benefits on large numbers of poor people, and excessive benefits on builders and developers. Moreover, the administration in office wished to reduce social expenditures. As a result, the political significance of HASE in its early years was to lend weight to the argument that nothing new should be done until the results were in. In the years since 1981, as results became available, its principal policy effect has been to buttress the case against subsidized construction, while subsidized rent received no support either. (Only some 15,000 persons nationwide now receive federally-subsidized rent vouchers.) Unlike the Perry example, results here were not distorted: subsidized construction is a bad bargain. But neither were their positive implications heeded.

These are three quite different ways in which knowledge produced by intermediaries has affected events, and only one of them fits the ideal model in which we learn what works and then broadly (and quickly) apply that learning. And this discussion excludes the many efforts of intermediaries that had little or no effect on events - some of which were never likely to. Little impact has resulted when - especially in intermediaries' first years - data-gathering proved unreliable or analytic techniques inadequate or



experimental conditions impossible to maintain; when, especially in the case of Vera, the desire to provide a service to the disadvantaged outweighed concerns for knowledge-development; and when ~~considerations of cash-flow or intellectual fine-tuning sanctioned~~ studies or experiments in areas where what works was already clear.

Does it follow that the ultimate objective of their work - greater rationality of policy, greater effectiveness of program and the consequent amelioration of social problems - is being so inadequately met that, as a class, the intermediaries are a failure? I am hardly at a point in the work where any answer to that question could be defended, but there are at least two reasons for thinking the answer is no. The first is that transmuted new knowledge into widespread action by large bureaucracies is a process that takes time - but with time, does happen. I once had occasion to direct a review of 83 reports, produced over 37 years by a variety of high-level commissions, task forces and study groups, all concerned with some aspect of the organization of the US government for the conduct of foreign affairs. Very few of the main proposals of those reports had been acted on within five years of their first expression. But very few had not been adopted, in substantial measure, within 15 years.

The second reason is that, even on the record of impact to date, the national investment in intermediaries has seemingly been highly cost-effective. Apart from those program costs whose equivalent would have been expended even in the absence of experiments, the total funding of the intermediaries from their foundings to the present seems not to exceed \$300 million. The programs whose design and operation they attempt to effect cost on the order of 1,000 times as much each year. Improvement of those programs by even minute degrees would therefore justify the investment in intermediaries. And effects have not been minute.

Does it follow, then, that the world of intermediaries five or ten years from now should look much as it does at present? That question introduces the last section of the paper.

#### IV. QUESTIONS ABOUT THE FUTURE

The issues about the future that the book would seek to illuminate, and that I want here only to raise, are grouped around two quite different questions: How might intermediaries function

more effectively in their accustomed roles? And given the current constraints on social progress, should existing intermediaries, or other kinds of mediating institutions, take on new roles?

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a. Better Performance in Current Roles. This series of questions would simply try to distill, from the now considerable experience of the intermediaries with numerous issues and various funders and audiences, best current practice. In particular, it would seek to identify the effect on the probability of achieving policy-impact of various factors external to the intermediary, and of the means intermediaries can use to offset or take advantage of those factors.

Among the external variables, for example, would be these: In order to have effect, must the experiment (or evaluation) convince mainly a legislative body, political level executives, senior bureaucrats, field operators, or organized employees? If convinced, will they have the capacity to implement the likely findings? Will using such findings require only that users believe them, or will they have to undergo deeper attitude-changes or, if program operators, develop new skills, routines, procedures? Do potential using organizations contain persons able to operate as "brokers of innovation?" Are the findings likely to reinforce or to threaten the dominant interests of those organization? Has a potential user initiated the idea for the research or experiment? Whether or not it initiated the notion, has a possible user sponsored the research? Have the producer and consumer organizations, or key individuals in each of them, ever worked together before?

Some of the answers to those questions will be much more closely associated with experiments whose results were resisted than others. But the reason for reviewing the evidence about them is not mainly to identify factors making for difficulty. It is to try to establish what measures intermediaries have used, or might use, to most effectively offset their effects. Such measures might include asking potential users (or their superiors, or analysts they have worked with and trust) to participate in designing, monitoring or operating the experiment; producing detailed accounts of how it was managed; paying particular attention to how, how frequently, how intensively and to whom the results of the experiment are communicated and who is accorded public credit; considering how much and what kind of technical assistance might be offered for replication, and the like.



b. New Roles. The second and more radical question is whether the intermediaries, or other entities, ought to take on additional roles and responsibilities. ~~The question is raised by the~~ current sense that, as noted earlier, the binding constraint on progress in many areas is not a lack of knowledge as to what works, but insufficient political or bureaucratic support for what is known to work, or inadequate entrepreneurial energy or administrative capacity to make it work.

What implications does this suggest for the intermediaries? In fields where crucial questions are still unanswered and where policy change and program development are occurring at reasonable rates there would seem to be few implications. These are fit arenas for intermediaries playing - effectively, one hopes - the traditional roles. When such arenas lack intermediaries and are important enough to justify such institutions, one question would be whether a new entity should be established or an existing intermediary encouraged to expand "horizontally" to enter it. If - but probably only if - an existing intermediary has an appropriate reputation and capable leadership, and either has or can readily acquire the requisite skills, its expansion may be the better course.

The harder, more common and more important questions about role arise in fields where uncertainty about what works is no longer (or was never) the constraint on better performance. The threshold questions in such fields will be whether any new institution, offering capacities not available in existing research or consulting or governmental bodies, might prove helpful. What capacities might those be? Essentially, those that extended downward the list that appears on page 6. That list ends with (vii) providing technical assistance to replicators, and (viii) packaging the essential elements of the program to facilitate replication. As least two other functions might be added: (ix) providing turn-key set-up of systems incorporating best current practice in the field; and (x) for indefinite periods operating such "model" systems.

Almost certainly, each of those four capacities, if present and well managed, would ease problems of bureaucratic inertia or resistance or, in the last case (of which private schools in a jurisdiction that employed a voucher system, and privately operated prisons would be examples) would circumvent them. Developing those capacities would clearly produce a major social good - fully as



significant as the prior social inventions of "think tanks" and intermediaries. And of course one of the current intermediaries, RTI, is wholly dedicated to function viii, with a probable capacity to undertake ix.

---

But whether at least the last three functions are appropriate for many of the other intermediaries now in operation seems not at all clear. The answer will probably depend, field by field, on the comparative performance in finding financial support and demonstrating effective operation, of perhaps four differing kinds of institutions. One would be intermediaries like Vera or P/PV which attempted to focus far more effort on facilitating the start-up of model or replicated programs, but which also sought to remain active in knowledge-development. Probably the principal question for them would be whether those two ends of the spectrum of functions can be combined in a single entity without compromising its clarity of purpose or its effectiveness at one end or the other, or at both.

A second would be wholly new entities, also non-profits funded partly by foundations and federal agencies as well as their client organizations (or client constituencies) but oriented wholly toward the latter functions. The problem for them would probably be how to amass the requisite policy, programmatic and operating knowledge without having spent some time in knowledge-development and operations, a problem they would probably try to solve by hiring personnel from both current intermediaries and from government agencies. Conceivably some of the current intermediaries apart from RTI might try to transform themselves into such entities, forswearing knowledge-development. The problem for them in the short term would be the internal conflict associated with any sharp change of organizational direction. In the longer term it would be remaining abreast of new knowledge and best practice.

A third category of institution would consist of private for-profit service-providers operating at least in function x, as private hospitals, prisons, fire and sanitation services do now, and as voucher-supported schools would do. Were a market to develop, they might also perform functions vii-ix. A major disincentive to doing that, however, would be that those three former functions would compete with the latter, and the latter would almost surely produce the greatest profits.

Finally, it is well to recall the traditional notion that the performance of important social functions, especially for the disadvantaged, is a public and therefore presumptively a governmental responsibility, and recall also the neglected truth that governments can sometimes produce innovation themselves - especially with new organizations: TVA, OEO, NASA. It is not impossible that in some jurisdictions government agencies might themselves serve some or all of these functions. In an era of growing and justified concern for the decline in standing and attractiveness of public service, that potential should not be assumed away.



Py 4/88

**PETER L. SZANTON****PROFESSIONAL EXPERIENCE**

1985-Present    President, Szanton Associates

1979-85:        Vice President, Hamilton, Rabinovitz, Szanton  
                    & Alschuler, Inc.  
                    Vice President, ENDISPUTE Incorporated.

1977-79:        Associate Director, Office of Management  
                    and Budget, Executive Office of the President.

1975-77:        Independent Consultant.

1973-75:        Research Director, Commission on the Organization  
                    of the Government for the Conduct of Foreign Policy  
                    (Murphy Commission).

1971-72:        Fellow, Institute of Politics, J.F. Kennedy  
                    School of Government, Harvard University.

1967-71:        President, New York City-RAND Institute.

1965-67:        Deputy Director, Program Evaluation staff, Bureau of  
                    the Budget; Senior Staff, White House Task Force on  
                    Government Reorganization (Heineman Commission).

1962-64:        Member, Policy Planning Staff, (International  
                    Security Affairs) Office of the Secretary of Defense.

1960-62:        Associate, Solinger & Gordon, attorneys,  
                    New York, New York.

1958-59:        Law clerk to U.S. District Judges Edward P. Murphy  
                    and Oliver Carter, San Francisco, California.



## MEMBERSHIPS AND AFFILIATIONS

Cosmos Club  
Council on Foreign Relations  
National Academy of Public Administration  
New York State Bar  
Sage Yearbooks in Politics & Public Policy; Advisory Board.  
Youth Service America (Board Chairman)

## EDUCATION

Harvard College (B.A.) 1952, magna cum laude  
Harvard Law School (LLB) 1958

## PERSONAL DATA

Born and raised in New York City. Enlisted in the U.S. Army in 1952; served in Korea. Married, with three children.  
Resident of Washington, D.C.

## BUSINESS ADDRESS

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SELECTED CONSULTING ASSIGNMENTS

For a major sectarian charity, designed and helped direct a participatory strategic planning process. (1988-89)

For the Hewlett Foundation and the National Institute for Dispute Resolution, analysed the status and prospects of organizations mediating disputes of public significance. (1988-89)

For the Board of Directors of the Inter-American Foundation, twice reviewed the Foundation's purposes and assessed its performance. (1984, 1988)

For their officers and members, proposed alternative missions for the Business Roundtables of Massachusetts and Hawaii. (1987-88)

For the Goldseker Foundation, and working with forty community leaders, developed a multi-year civic agenda for Baltimore. (1985-87)

For the Ford Foundation, co-directed an intensive study of the probable benefits and costs of four alternative forms of national service. (1982-86)

For a multinational energy corporation, projected the probable future course of Canadian energy policy. (1981)

For the Administrative Conference of the U.S., directed a review of the lessons learned in attempts to reorganize federal agencies. (1980)

For the President's Reorganization Project, advised on reorganization of the White House and of the Executive Office of the President. (1977)

For the Ford and Russell Sage Foundations, reviewed the record of universities in providing advice to municipal agencies, and of municipalities in utilizing such advice. (1979-80)

As director of the RAND Corporation's work for New York City,  
initiated and supervised the most extensive analyses of municipal policies and operations conducted in any American city, including systematic reviews of the city's Health, Housing, Fire, Police, Welfare and Environmental Services agencies. (1968-71.)

## PUBLICATIONS

### Books

National Service: What Would It Mean?, with Richard Danzig (Lexington, Massachusetts: D.C. Heath, 1986).

Federal Reorganization: What Have We Learned? (New Jersey, Chatham House, 1981).

Not Well Advised, (New York: Ford and Russell Sage Foundations, 1981).

Remaking Foreign Policy: The Organizational Connection, with Graham Allison (New York: Basic Books, 1976).

### Published Reports

Baltimore 2000: A Choice of Futures (Baltimore, Maryland: Morris Goldseker Foundation of Maryland, Inc., 1987).

Dispute Resolution in America: Processes in Evolution (Washington, D.C.: National Institute of Dispute Resolution, 1984), with Jonathan Marks and Earl Johnson, Jr.

Report of the Commission on the Organization of the Government for the Conduct of Foreign Policy (Washington, D.C.: Government Printing Office, 1975), principal author.

Citizen Organizations: Increasing Client Control Over Services (Washington, D.C.: RAND Corporation, 1973), with Robert Yin and William Lucas.

### Articles

"OMB's Defense Cop-Out," Foreign Policy, No. 58 (Spring, 1985).

"Coordinating National Security Policy: The Role of OMB," United States Defense and Foreign Policy (Greenwich, Ct.: JAI Press, 1985).



"Reconstructing the Presidency," Politics and the Oval Office, A. Meltsner, ed. (San Francisco, California, Institute for Contemporary Studies, February, 1981).

"Two Jobs, Not One." Foreign Policy, No. 38 (Spring, 1980).

"Urban Public Services: Ten Case Studies," Innovation and Implementation in Public Organizations, R. R. Nelson and D. Yates, eds. (Lexington, Mass.: Lexington Books, 1978).

"Toward the Urban University," The Innovator, Vol. 5, No. 2 (March/April, 1978).

"Organizing for the Decade Ahead," Setting National Priorities (Washington, D.C.: The Brookings Institution, 1976), with Graham Allison.

"Intelligence: Seizing the Opportunity," Foreign Policy, No. 22 (Spring, 1976), with Graham Allison.

"Public Policy, Public Good, and the Law," Antitrust Law and Economics Review, Vol. 6 (Spring, 1973).

"Analysis and Urban Government: Experience of the New York City-RAND Institute," Analysis of Public Systems, A.W. Drake, et. al., eds. (Cambridge, Mass.: MIT Press, 1972).

"Systems Problems in the City," Operations Research, Vol. 20, No. 3 (May-June, 1972).

"Working with a City Government: RAND's Experience in New York City," The Engineer and the City (Washington, D.C.: National Academy of Engineering, 1969).

"Program Budgeting for Criminal Justice Systems," Report of the Science and Technology Task Force, President's Commission on Law Enforcement and Administration of Justice (Washington, D.C.: Government Printing Office, May, 1967).

"Stare Decisis: A Dissenting View," Hastings Law Journal, Vol. 10 (1959).

13.4.89  
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ירושלים

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FACSIMILE TRANSMISSION

TO: ART NAPARSTEK  
FROM: ANNETTE HOCHSTEIN

DATE: APRIL 13, 1989

NO. PAGES: 1

FAX NUMBER: 001-216-391-8327

Dear Art,

We will try to call you today between  
1:00 - 2:00 p.m. Cleveland time.



TO: See Distribution FROM: Arthur J. Naparstek DATE: 4/13/89  
NAME  
 DEPARTMENT/PLANT LOCATION

SUBJECT: Commissioner Interviews

Following is a list of Senior Policy Advisors and the Commissioners who have been assigned to you. Please provide me with a schedule of when you intend to interview your people. We will have the interview guidelines to you by Monday. All interviews should be completed by May 5. I would like to have write-ups of the interviews no later than May 8.

<u>Sr. Policy Advisor</u>	<u>Commissioner</u>
David Ariel	none
Seymour Fox	Charles Bronfman Lester Crown Charles Ratner Alfred Gottschalk Seymour Martin Lipset Isadore Twersky Sara Lee
Annette Hochstein	Ludwig Jesselson Morton Mandel Florence Melton Esther Leah Ritz Norman Lamm Ismar Schorsch
Stephen Hoffman	none
Morton Mandel	Max Fisher Joseph Gruss
Arthur Naparstek	Mona Ackerman Mandell Berman Stuart Eizenstat Matthew Maryles Peggy Tishman Bennett Yanowitz Alvin Schiff Haskell Lookstein

INTER-OFFICE COMMUNICATIONS

67I



Sr. Policy AdvisorCommissioner

Joseph Reimer

Ronald Appelby  
 David Arnow  
 Irwin Field  
 Henry Koschitzky  
 Mark Lainer  
 Robert Loup  
 Lionel Schipper  
 Arthur Green  
 Jack Bieler  
 Josh Elkin  
 Carol Ingall  
 Harold Schulweis  
 Isaiah Zeldin

Arthur Rotman

David Dubin  
 Donald Mintz  
 Lester Pollack  
 Harriet Rosenthal  
 Daniel Shapiro

Carmi Schwartz

none

Herman Stein

none

Jonathan Woocher

Irving Greenberg

Henry Zucker

John Colman  
 Maurice Corson  
 Eli Evans  
 Robert Hiller  
 David Hirschhorn

## Distribution:

Seymour Fox  
 Annette Hochstein  
 Morton L. Mandel  
 Joseph Reimer  
 Arthur Rotman  
 Jonathan Woocher  
 Henry L. Zucker

# Commission on Jewish Education in North America

## Project Log

TITLE: BEST PRACTICE

ASSIGNED TO: JR

NO:

DESCRIPTION: CASE STUDIES OF OUTSTANDING PROGRAMS IN JEWISH EDUCATION

Date	Current Status	Next Steps	By
10/4/88	Two Year Plan lists "getting the best practice paper officially off the ground" as an agenda item for the 2nd meeting of the Commission.  Progress report on the paper at 3rd meeting of the Commission; final report at 4th meeting of the Commission.		
10/4/88	Draft proposal prepared by AH	Discuss at plan. group meetings	
10/14/88	Discussed at meeting of educators in Boston, suggestions made on how to do it.	No decision	
10/10/88	Discussed at meeting of planning group, suggested that outline of paper be presented at 12/13/88 meeting.	No decision	
10/12/88	Discussed at meeting of senior policy advisors.	No decision	
10/26/88	Assignment list calls for draft of paper to be done before the 2nd meeting of the Commission.		

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BM

# Commission on Jewish Education in North America

## Project Log

TITLE:

ASSIGNED TO:

NO:

DESCRIPTION:

Date	Current Status	Next Steps	By
7/8/89	Discussed at senior policy advisors meeting; importance stressed.	Due date TBD	
3/10/89	Discussed at Jerusalem meetings. Incorporated into outline for final report.	New proposal to be drafted within weeks.	JR



# Commission on Jewish Education in North America

## Summary of Project Status

Title	Assigned To	Current Status
"Best Practice"	JR	to be part of final report draft due TBD
Vision Paper		draft by SF -- due TBD
State of the Field		conceptual outline written by JR -- March 1, 1989
Options Papers		
redraft of Personnel		to be done by SF -- due TBD
redraft of Community		to be done by HLZ -- due TBD
correct drafts of:		
knowledge base		to be done by SF -- due TBD
e. ch. age group		
young adults		
elem. age group		
write drafts of:		
college age group		to be done by JR -- due TBD
retired/elderly		
Hebrew language		
tuition		
physical plant		
innovations		
PR campaign/materials	AJN	Paula Berman Cole -- in progress
Networking with Jewish organizations -- develop strategies		list by JR completed? discussed at mtg. of 3/29
Small group meetings		TBD: 8-9/89?
JE document		revised at meeting of 3/29
Final report		second draft of outline to be written by AJN/JR
Relationship with local commissions/federations		Revision of Joel Fox's paper? strategy by HLZ?
Inventory -- check with experts, revise		
	2	

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Commission on Jewish Education in N.A.  
Meeting of Commission Educators  
April 5, 1989

New York, BJE  
426 West-58<sup>th</sup> St

I. Moving Forward from December 13th.

1. A focus on the enabling options of "personnel" and "community".
2. In relation to various programmatic areas.
3. The challenge to devise a workable strategy for addressing these effectively in the field as a way of launching across-the-board change and improvement.

II. Assumptions about working in the field.

To respond to the above challenge it is necessary to demonstrate that the personnel and community options can indeed be acted upon in the comprehensive manner that they were formulated. For personnel this involves recruitment, training, retention and profession-building. For the community this involves recruiting outstanding leadership, changing the climate and generating significant additional funding.

The following are some assumptions which could guide our working in the field of Jewish education.

1. It is difficult to meet the challenge of change on the national level alone because it is too complex and vast. (This is not to rule out the direct involvement of national agencies (see 2g below).
2. On the other hand there is good cause to believe that it could be undertaken on the local level, for the following reasons:
  - a. Much of education takes place only on the local level.
  - b. The scope of a local undertaking that would be comprehensive could be manageable. There is sufficient energy and there are enough people to undertake such a project.
  - c. The results of a local undertaking would be tangible and visible and could generate interest and reactions that might lead to a national debate on the important issues of Jewish education.
  - d. A local project could be managed in a hands on manner. Therefore it could be constantly improved and fine-tuned.

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- e. There are ideas and programs (best practice) that if brought together, integrated and implemented in one site could have significantly greater impact than they have today when implementation is fragmented. The whole is greater than the sum of its parts.
- f. Visions of Jewish education could be translated and experimented within a limited and manageable way.
- g. National institutions and organizations could be mobilized for such experimental programs. They would view this as an opportunity to test and develop new conceptions for Jewish education.
- h. People could be recruited and mobilized for tangible local demonstrations. The pool could be expanded to include - in addition to the current cadre of outstanding educators.
  - 1. Rabbis
  - 2. Scholars of Judaica
  - 3. Federation executives
  - 4. Jewish scholars in the humanities and sciences.

3. Local sites could be networked for greater impact.

4. Working on the local scene could take advantage of working both from the "bottom-up" and from the "top-down".

### III. Assumptions on Bringing About Change

A number of assumptions on how to bring about change would guide the work of implementing the enabling options.

- 1. The community and personnel options are interrelated and a joint strategy involving both must be devised. Indeed, dedicated and qualified personnel is likely to affect the attitude of community leaders towards education. Similarly, if the community ranks education high on its list of priorities, more outstanding personnel is likely to be attracted to the field.
- 2. Dealing effectively with the personnel issue will probably require a comprehensive approach: recruitment, training professional building and retention will all have to be dealt with simultaneously.
- 3. In addition to the complex package of initiatives and interventions required by (1) and (2) above, the issue of the time necessary to introduce change will have to be addressed. This will require deciding on an appropriate balance between:

Short, medium and long term results.



4. All key stakeholders will need to be appropriately involved from the very beginning of this process. This includes commissioners, national organizations and institutions, local organizations and institutions, professionals (local and national), and funding sources.
5. Significant questions concerning innovation and implementation of the two enabling options - and of the programmatic options when they will be addressed - can only be resolved in real-life situations, through the dynamics of thinking for implementation and in the actual act of implementing.

#### IV. Working Through Community Action Sites

If the above assumptions make sense as guides to our work in the field, a suggested way to operationalize these assumptions is for the commission to decide to work with communities to become Community Action Sites for dealing with the community and personnel options.

1. By Community Action Site we mean a site ( a community, a network of institutions, one major institution, etc.) Where some of the best ideas and programs in Jewish education would be initiated in as comprehensive a form as possible. It would be a site where ideas where the ideas and experimental programs, would be undertaken. Work at this site will be guided by a vision of what Jewish education at its best can be.
2. The assumption implicit in the suggestion of a Community Action Site is that other communities would be able to see what a successful approach to the community and personnel options could be like, and would be inspired to apply the lessons learned to their programs, in their own communities.

#### V. How to Implant the Community Action Sites

As Community Action Sites were being considered, a number of questions and issues related to their implementation arose.

1. Implicit in the notions of change, innovation, new initiatives, demonstration, is the assumption that one knows what should and can be changed, innovated, demonstrated in Jewish education needs to be developed or created.
2. Programs for implementation are seldom successful when they are "top-down" programs. communities must play a major role in the initiation of the idea, they must be full partners in the design of programs and in their implementation.

3. Numerous questions need to be addressed in considering the Community Action Sites approach: Who will undertake the strategic thinking? Who will plan and ensure that the standards and goals of the Commission are maintained? Who will actively accompany the ideas through their stages of development and implementation? Who will deal with the unresolved issues as they arise in implementation? Who will see that things work, and that they can be replicated? Who will consider issues of change throughout the universe of Jewish education.



Commission on Jewish Education in N.A.  
Meeting of Commission Educators  
April 5, 1989

AGENDA

1. Moving Forward from December 13th: The enabling options.
2. Assumptions to examine about working in the field.
3. Assumptions to examine about the nature of change.
4. Working through Community Action Sites.
5. How to implement Community Action Sites.



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BM



ESNA



M E M O

March 31, 1989

TO: Art Naparstek  
Seymour Fox  
Annette Hochstein  
Joe Reimer

FROM: Jonathan Woocher

RE: IJE Mechanism

Since we did not get the opportunity to complete our review of the paper on the IJE mechanism yesterday, I thought it might be helpful for your redrafting if I shared in writing some of my comments. (Please forgive the repetition of points I raised yesterday.)

#### I. Rationale for creating a mechanism

I believe that it must be emphasized that the rationale for IJE is both "positive" and "negative," i.e., it is grounded in what does exist and what does not. As in the contemplated Commission report, we should present this initiative as a complement, extension, and crystallization of efforts already underway and of ideas which are already beginning to gather momentum. I would take this tack for two reasons: 1) It accurately reflects current reality, which is dynamic and moving in the same directions we have identified; 2) It will immediately position the IJE as an ally of existing change efforts, and not a threat, competitor, or implicit critic.

The "negative" rationale is as we have discussed it: there is currently no place where resources (intellectual, human, financial) are focussed sufficiently to create a critical mass able to initiate and implement substantial change.

#### II. Change Strategy

I fully accept the premise that the primary locus for change efforts should be communities. I think that it is correct that "solving the personnel crisis" on a continental level is inconceivable as a realistic short- or mid-term goal, and that the path to its eventual "solution" (or substantial amelioration) passes through the local communities. However, in order to effect significant change locally, the national contexts will have to be both addressed and involved as part of any truly comprehensive strategy.

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JONATHAN S. WOOCHEER  
Executive Vice President

To cite one example, perhaps not the best, in the personnel area: If we agree that one aspect of any comprehensive approach includes upgrading the professionalism of educators (a matter of both training and profession-building), linking local efforts to develop ongoing, high quality continuing professional education to national structures both for the provision of some of that training and for the certification of growth (as part of the profession-building component) seems to me important. I think comparable arguments could be made in the area of community-building. There is, e.g., no continental setting where top leadership in Jewish education comes together (no GA or Biennial for Jewish education). In the long run, I don't see how the efforts to build a cadre of top leadership in Jewish education who will stay involved locally can succeed, without some national forum for them to come together.

I am arguing, therefore, that in presenting our strategy for change, we acknowledge the need for keeping local efforts in sync with parallel and interrelated changes at the national and international levels. Even though the latter might not (and perhaps should not) be the IJE's responsibility in the same manner as stimulating and supporting local change, there should be a clear identification of the importance of the national components to the long-term success of the local initiatives.

### III. How to make this work

The functions identified for IJE are all necessary and important. We do need to think carefully, however, about how actually to do them all.

This question is part of the larger one of how the IJE will operate, its structure, staffing, etc. I believe that in answering these we should be guided both by our vision for IJE and a number of practical considerations. E.g., the functions envisioned in the planning paper for IJE are extensive. I am confident, based on our experience, that to do them all adequately would require a fairly sizable staff. Where in our already hard-pressed system will we find the people to staff a sophisticated enterprise of this type? What would be the implications of building a sizable permanent staff, both in terms of how IJE will be perceived by other actors and in terms of the direct impact on the institutions from which such staff would have to come (robbing Peter to pay Paul)? Also, we need to ask: where and how are some of these things already being done (albeit, perhaps, only partially and imperfectly), and where and how might they be done, other than in and by IJE itself, with appropriate redirection of resources?

If a part of our goal is to build the infrastructure to sustain and diffuse innovation on a system-wide basis growing out of the



model action projects undertaken by the IJE, then there are real advantages, I think, in strengthening infrastructures working in such areas as research, resource and information dissemination, consultation, and evaluation so that they will be equipped to perform these functions better over the long haul. If, e.g., the IJE becomes the place where field-wide data is available, where brokering between foundations and projects takes place, where staff for community action sites are being recruited, it will almost inevitably find itself called upon to play a broader role as a service agency for the field as a whole than we envision. Resisting those calls will have its own negatives attached.

I would envision IJE as a highly flexible "strike force," which by virtue of the priority of its mission, prestige of its leadership, and talents and skills of its core staff will be able to orchestrate the bringing to bear of a wide range of resources (including some which may have to be created) on the projects it chooses to undertake. These resources, however, need not be permanently attached to IJE; nor should the resources be used only for IJE projects. Rather, IJE would work extremely closely with a range of agencies and institutions, beginning, but not ending, with CJF, JESNA, and JWB, to identify where its interventions can be most productive, to assemble the "teams" it needs to work at the highest level with the community action sites, and to link the the community action sites with the appropriate resources outside IJE itself which would be needed to implement the designs for change which are developed.

IJE would draw upon what is already available in terms of talent, information, and resources, but which is today rarely used in a planful and coordinated manner to stimulate and support comprehensive community change. When it finds that what is needed is not currently available or is not of high enough quality, then IJE will need to decide how to make it available -- whether through IJE itself, or through turning to one of its collaborators and helping it develop what is needed (which may mean that it then becomes available to a wider domain than the community action site alone).

In order to insure that IJE has enough "depth" to do this job -- and particularly to do the ongoing thinking, planning, and evaluation of strategies and models -- its core staff, which I would see as numbering only 2 or 3, could be augmented by "fellows," who would be attached to IJE for a period of time (one year?) to serve as the intellectual backbone of the enterprise. By using individuals on loan or leave from other institutions in this capacity, one would be gaining the dual benefit of insuring that the IJE staff remains well attuned to the day-to-day realities in other institutional settings (a problem we know well from our consulting work), and enriching the institutions to which such "fellows" will return.



In general, I believe that in the long run IJE will be most successful if it is clearly perceived as bringing us to that "win - win" scenario we spoke of yesterday: one in which everyone clearly benefits and is strengthened by its work. Knowing how the Jewish world functions, that means some immediate gratifications as well as long term improvements. The best way to provide these, I believe, is to insure that as many players as possible are involved significantly in IJE's work.

Obviously, there are serious challenges operationally in creating a mechanism which works largely as an orchestrator and catalyst, and which does not control directly all of the resources it will require in order to fulfill its mission. But this will be inevitable at some level in all events, and I suggest that we make a virtue of necessity by accentuating the collaborative character of IJE. It should be not merely a resource for local communities which want to change, but a vehicle to enable the many institutions and agencies which are, genuinely, partners in the vision of the Commission to be full partners in the realization of that vision.

Are all of these institutions really capable of performing at the level of excellence which we want to model? Probably not, which is why initiative, selection, and coordination must remain in the hands of IJE. But, we must wager that at least some of them can be brought through their involvement to higher levels of performance, or in the end, we will lose anyway.

I hope these reflections are helpful in stimulating your ongoing thinking over the next few days and weeks. I look forward to our continued discussions on how to make the Commission the launching pad for dramatic change which we want it to be.

MINUTES: Senior Policy Advisors Meeting

DATE: March 30, 1989

DATE MINUTES ISSUED: April 17, 1989

PRESENT: Morton L. Mandel, Chairman, David Ariel, Seymour Fox, Annette Hochstein, Stephen H. Hoffman, Virginia F. Levi (Sec'y), Arthur J. Naparstek, Joseph Reimer, Arthur Rotman, Herman Stein, Jonathan Woocher

GUEST: Herbert Millman

COPY TO: Carmi Schwartz, Henry L. Zucker

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I. Review of the IJE Concept

A. Underlying Assumptions

There was extensive discussion of the underlying assumptions to the draft concept paper.

1. It was suggested that work at the local level and significant change at the national level must occur simultaneously. The paper should refer to continental service agencies and to the possible relationship of IJE to JWB, JESNA, Yeshiva, Brandeis, etc. The ways in which the continental and local bodies interact to create interventions and support systems should be spelled out more clearly.
2. The document implies that North American Jewish education is in a steady state. It was suggested that this is not the case, but that a dynamic environment already exists as evidenced by the existence of local commissions on Jewish education. Does the IJE have maximum impact by plugging into processes already under way, by starting at the beginning in communities not already engaged, or through some combination? It was noted that, because the IJE would not be a service providing agency, it would be in a position to select locations where it could serve as an effective resource.
3. The mission of the IJE is to stimulate and catalyze. One approach is to get things going on a local level and withdraw when a local effort can become self-sustaining. In light of this approach, the IJE should develop entities (e.g. commissions) that include existing relevant institutions in local communities; the local federation should generally be dominant.



4. The IJE should function at the national level, while working on the local level to develop prototypes or models which can be applied elsewhere. It will not provide regular service on the local level. It will work closely with national organizations for diffusion purposes (application of lessons learned in one city to others). The IJE is intended to help identify local problems and seek national solutions.
5. We should anticipate counter-assumptions and deal with them in advance. One such assumption might be that the denominations or training institutions are a sufficient means to solving the problems of personnel and community.
6. We must assume that the existing network of institutions in America has neither the money nor the existing capacity to bring about the outcomes we seek. In addition to a written report, an outcome of the Commission should be a way to enhance the likelihood of implementing goals for Jewish continuity: an institution to seek resources and help implement change locally. This body should be free to experiment and innovate in local communities, in conjunction with federations, and link appropriately to denominations. The IJE's role must be unique.

The IJE is a means of mobilizing the resources of the Commission. It must establish an effective working relationship with current national bodies. The document should indicate how this would work while noting that there is much happening at present.

B. Bringing About Change

A discussion of the section of the concept paper entitled "Bringing About Change" yielded the following suggestions:

1. It would be useful to always include a time frame within which the IJE would work with a given local community.
2. Many commissioners retain strong interests in programmatic options. It would be useful to build a statement into the paper explaining the link between the IJE approach and the programmatic options.
3. In defining a community action site, discussion turned to the question of whether the IJE should consider working with just one institution in a city. The conclusion was probably not--that the key to change is to create a mechanism to work locally under the leadership of the federation--and that working with a single institution would dissipate IJE's energy. However, the concept of working with a single institution will be kept on the books as a possibility.



4. It is clear that the IJE will need to fully evolve over time. Our responsibility at present is to clarify the initial design and framework and to be as clear as possible regarding goals.
5. There is overlap between some of the proposed responsibilities of IJE and much of what JWB and JESNA (and others) currently do. In clarifying the role of IJE, we should apply the test of where its contribution can be unique. It was suggested that a paragraph be added to the document indicating that it is understood that "engineering" must take place among IJE and JESNA, CJF, JWB, and others. In addition, key institutional leadership should sit on the IJE board.
6. The issue of scope must be considered further. It was felt that the IJE should have sufficient resources and capital to develop initiatives on the local level. In addition, structured means should be developed (i.e. seminars, programs, communications, data collection and analysis) to enhance diffusion.
7. While there are no models for the IJE within the field of education, we are aware of similar intermediary organizations such as LISC and the Enterprise Foundation which have successfully implemented similar concepts in other fields.

C. Next Steps

ignment

Participants were asked to review the remainder of the document and to submit comments to AJN. In addition, group members were encouraged to consider competing models and to submit them in writing to AJN for dissemination and review.

II. Involvement of Denominations in the Work of the Commission

ignment

- A. JW will prepare a list of the critical groups within each denomination, the major players, and their roles. This will be sent to AJN.
- B. What is our Objective?
  1. We should be in communication with each denomination so that when the IJE is working in a community, each denomination might participate appropriately. While the federation serves a convening role and IJE staff and service institutions help shape the process, important content might be provided by the denominations.

Senior Policy Advisors Meeting  
March 30, 1989

Page 4

2. The denominations are heavily involved in the area of personnel because that's where most of the children are. While the process of change in the denomination world is sometimes slower than within federations, if we can encourage a competitive atmosphere, we might create a climate in which denominations would move more quickly.

C. What should be done?

assignment

It was suggested that MLM along with JW or AR meet with Lamm, Schorsch, and Gottschalk. Each leader should be asked to help develop a mechanism to involve that denomination. Lamm should be asked how we can approach Torah U'Mesorah.

III. Final Report - Rolling Outline

A. General Outline

A proposed outline for a final report was reviewed and discussed. It was agreed that a document on vision is important as a rationale for the IJE concept. A review of the state of the field provides a sense of urgency and emergency. The issue of Jewish education as a vehicle for Jewish continuity belongs at the forefront of the document.

B. Commissioning Papers

ignment

The first section of the report might be called "Jewish Continuity at Risk." In this section, the link between Jewish continuity and Jewish education should be established. Work might begin on this first section of the report after the June Commission meeting. JR will draft a thought piece on alternative scenarios for the content of the final report. This will be reviewed by internal staff and then distributed to senior policy advisors for critique. It should be completed by June.

gnment

JR requested that policy advisors review Exhibit 4--"Commissioning Papers"--and provide him with feedback.

IV. PR Status Report

- A. It was noted that we have engaged Paula Berman Cohen to coordinate public relations efforts and have established a PR Committee comprised of David Ariel, Paula Berman Cohen, Stephen Hoffman, Virginia Levi, Morton Mandel, Arthur Naparstek, Charles Ratner, Bennett Yanowitz, and Henry Zucker.



assignment  
assignment  
It was suggested that the June Commission meeting should be an "event." We should begin now to establish links with such publications as Moment, the New York Times, and the Wall Street Journal. MLM will arrange for Premier's PR representative to work with PBC in establishing contacts with the New York Times and the Wall Street Journal. MLM will consider calling Herschel Blumberg and Paul Berger in an effort to interest Moment in the Commission.

B. Interim Letter to Commissioners

assignment  
A draft letter to commissioners was reviewed. It was suggested that such a letter, to go out by April 15, should serve as an invitation to regional meetings and an update on activities since the December 13 meeting and should refer to a possible Commission outcome in the form of an implementation mechanism. AJN will rewrite the letter.

C. Content of Small Group Meetings

It was noted that Charles Bronfman and Lester Crown have agreed to host regional meetings in New York and Chicago, respectively. In addition, commissioner educators are scheduled to meet in New York on April 5. Following an extensive discussion, it was concluded that the concept paper should not be distributed prior to these meetings. Staff will share the issues and emerging assumptions, but not the conclusions. The purpose of the meetings should be to get input on major questions and to provide participants with a sense that there will be something beyond the Commission.

Commissioners should be engaged at the regional meeting and should have a sense that we are approaching a recommendation which we intend to make at the June Commission meeting.

The letter inviting commissioners to the regional meetings should be on Commission letterhead, should invite all people to either meeting, and should be accompanied by an outline of the issues under consideration. Confirmation letters would come directly from Crown or Bronfman.

[Note: It was subsequently felt by Commission leadership that such meetings are premature and will be deferred.]

V. Commissioner Contact

gnment  
Group members assigned to contact individual commissioners will submit a written report on each such contact. VFL will keep a master book on all commissioner contacts and will bring it to each meeting.

gnment  
The group reviewed the list of commissioners and determined which should be contacted individually prior to the June 14 meeting. A summary of those decisions is attached.



Senior Policy Advisors Meeting  
March 30, 1989

Page 6

VI. Outreach

A. Progress Report

signment

A memorandum by JR setting forth a list of organizations in need of contact and recommendations for the nature of that contact was reviewed. This will be presented to the Public Relations Committee.

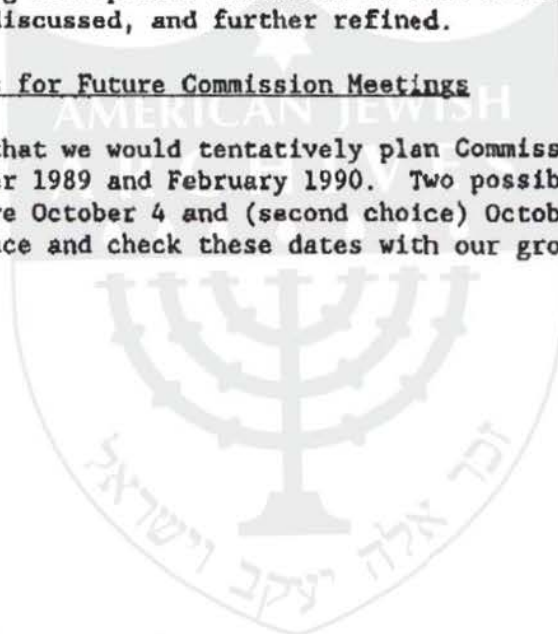
B. Educators Meeting

It was agreed that at the April 5 meeting of educators the issues and emerging assumptions discussed at this meeting would be reviewed, discussed, and further refined.

VII. Tentative Dates for Future Commission Meetings

ignment

It was agreed that we would tentatively plan Commission meetings to occur in October 1989 and February 1990. Two possible dates for the next meeting are October 4 and (second choice) October 11. VFL will reserve the space and check these dates with our group of critical participants.



MINUTES: Planning Group Meeting  
Commission on Jewish Education in North America

DATE: March 29, 1989

DATE MINUTES ISSUED: April 17, 1989

PRESENT: Morton L. Mandel, Chairman, Seymour Fox,  
Annette Hochstein, Virginia F. Levi (Sec'y),  
Arthur J. Naparstek, Joseph Reimer, Herman D. Stein,

COPY TO: Henry L. Zucker

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## I. Introduction

The chairman welcomed planning group members and reviewed the agenda for the day. This was followed by a brief review of minutes of the planning group meetings of February 7-9.

In a report on activities since the last meeting, it was noted that work has focused on the issue of implementation in preparation for this meeting.

## II. The ii Concept

Much of the day was spent in careful review of the paper proposing "An Instrumentality for Implementation."

A. The following general issues were raised:

### 1. Semantics

Discomfort was expressed with the use of the terms "instrumentality for implementation" and "demonstration center." The alternatives which were suggested and agreed upon, for the present, are "initiatives for Jewish education" (IJE) and "community action sites."

2. The need for "bottom-up" along with "top-down" management should be clearly stated. This assumes that the major focus of the IJE is to work with service institutions and communities to help them decide upon their needs and goals. It is important to be aware that these needs will vary by institution and community. The goal: to help each be the best it is ready to be.
3. It is important to reflect in this document an intent to optimize the full potential of all existing institutional resources (JWB, Brandeis, CAJE, etc.).

4. Community can be defined to encompass the "enlarged federation family": the local federation, congregations and other bodies.
5. How do we know that there is interest in the services of the IJE? We might consider building in a pilot project so that a design might be tested before the entire project is launched.
6. A clearer sense of the organization and related costs is needed.
7. It would be useful to identify potential sources of resistance and to develop strategies to overcome the resistance.
8. This concept is dependent upon finding an effective leader.
9. The IJE is an "intermediary organization" capable of convening groups that might not otherwise come together. It should have the power to leverage funding. It should assist with program design, monitoring and evaluation.
10. It is not yet clear whether the IJE will be able to provide funding. It may operate on the prestige and ability of the board, the staff, and their ideas. It was noted that if the IJE were responsible for fundraising on an ongoing basis, this might detract from its central purpose.
11. In the organizational design it was suggested that the term "professional advisory board" replace "academic team."

B. Introductory Remarks

As a preface to a careful review of the concept paper, SF and AH made the following remarks:

1. The concept paper assumes that the issues of personnel and community must be approached on the local level. It also assumes that there are currently no known programs which, if replicated, could solve the problems in the field. The strategy is to approach the problems locally and demonstrate that there are things that can be done to improve the situation.
2. It is assumed, further, that there are talented people who, under the right circumstances, could be encouraged to contribute and get involved. However, they must be identified and brought together to take action. It is believed that no local community or existing organization could bring this talent together, but that this is a role for IJE.



3. This would not be a simple dropping of "generic programs" into communities, but a process which would be carefully tailored to each community involved, and involve the community heavily.

C. Assumptions

1. The field of Jewish education is complex and vast. Efforts at innovation must be undertaken at the local level.
2. There is no single community where a prototype can be implemented and fine-tuned for general application. Instead, there must be constant on-line fine tuning in a number of locations. This calls for close monitoring and evaluation. It is the purpose of the IJE to build the prototype and of the community action site to serve as the means of fine tuning and later dissemination.
3. The purpose of the IJE is to facilitate the development and testing of programs but not to become a service-delivery organization.

D. Other Issues

1. The IJE dealing with personnel and community is a means to reaching our goals. By the nature of this endeavor, the programmatic options will be involved. Personnel will be developed for specific programs.
2. Is personnel, by its nature, capable of change only over a long period? It is believed that through a stronger recruitment process, new energy can be infused into a community relatively quickly.
3. One goal is to identify selected local problems and seek national solutions for them.

The foregoing discussion accompanied a careful review of the concept paper. Suggestions were made for revision of the paper which were incorporated in a rewrite prepared for presentation at the senior policy advisors meeting of March 30.

E. Tentative Timetable

The following is a possible timetable for implementing the IJE concept:

- |               |   |
|---------------|---|
| June 1989     | - Commission meeting - general agreement to the IJE concept.                              |
| November 1989 | - present the final paper on the concept and the beginning outcomes of a director search. |
| February 1990 | - present the director to the Commission.   |
| June 1990     | - first report of the IJE director; first meeting of the IJE board.                       |

Planning Group Meeting  
March 29, 1989

Page 4

### III. Commissioner Contact

The group discussed the nature of contact to occur with commissioners prior to the June 14 meeting. It was agreed that the commissioners should be given a sense of the issues and we should determine if we have consensus on the general concept of the IJE.

- A. Charles Bronfman and Lester Crown have agreed to host regional meetings in New York and Chicago, respectively, on May 8 and 9.
- B. In addition, a meeting of commissioners who are Jewish educators is scheduled to take place on April 5 in New York. Depending on the outcome of this meeting, participants may be asked to attend regional meetings, as well.
- C. At these meetings and in any contacts with commissioners, it will be important to test their views without manipulating them.
- D. The nature of the interaction at these meetings and in one-on-one meetings with specially identified commissioners was reserved for discussion with the senior policy advisors on March 30. It was agreed that a draft talk sheet would be developed by no later than April 15 by SF and AH and would include a list of items to discuss, items not to discuss, and potential risks. In addition to members of the planning group, our representatives from JWB, JESNA, and CJF should review and approve this document.

ignment

### IV. Preparation for March 30 Meeting of Senior Policy Advisors

The agenda for the March 30 meeting of senior policy advisors was reviewed and revised in light of this meeting.

Meeting of Senior Policy Advisors  
March 30, 1989

Agenda

	<u>Exhibit No.</u>
I. Progress report (12/13 to 3/30) - From enabling options to implementation mechanism; how did we get there?	1
The IJE concept	
1. What are the advantages?	
2. What are the limitations?	
II. Discuss ways to fully involve leaders from the denominations in our work	2
III. Review Commission report - rolling outline	3,4
IV. PR status report	
- Draft of letter to commissioners	6
V. Progress report on outreach - meeting of educators	7
VI. Discuss tentative dates for 4th Commission meeting	
VII. Review commissioners; plan nature of contacts to occur with commissioners before 6/14	5,5a

151BM



Meeting of Senior Policy Advisors  
March 30, 1989

Folder Contents

Exhibit No.

Agenda

1. The IJE Concept
2. Memorandum on the Commission and the Denominations
3. Outline for Final Report
4. Memorandum on Commissioning Papers
5. Suggested Contact with Commissioners - 3/30 to 6/14
- 5a. Commissioner Contact Sheet
6. Draft Letter to Commissioners
7. Memorandum on Commission Outreach



152 BM

DRAFT

March 30, 1989

Dear \_\_\_\_\_:

At the last meeting of the Commission on December 18th, a number of options were considered. The Commission opted to focus its work initially on two topics:

1. Dealing with the shortage of qualified personnel for Jewish education. and
2. Dealing with the community -- its structure, leadership and funding, as keys to across-the-Board improvements in Jewish education.

At the same time, many commissioners urged that work also be undertaken in various programmatic areas (e.g. early childhood, day schools, supplementary schools et. al.)

One challenge facing us now is to develop creative, effective and feasible approaches for dealing with the topics at hand (personnel and community) and to launch the process that will bring across-the-board improvement and change. The staff is attempting to respond to this challenge and is preparing practical ideas and tangible proposals. They are developing a plan which, I believe, is exciting as it promotes change and innovation in Jewish education with local communities, and has the power to inspire change elsewhere as well.

Numerous questions need to be addressed by the Commission as we consider this approach. Therefore, I believe that at this time it is important for us to

160 BM

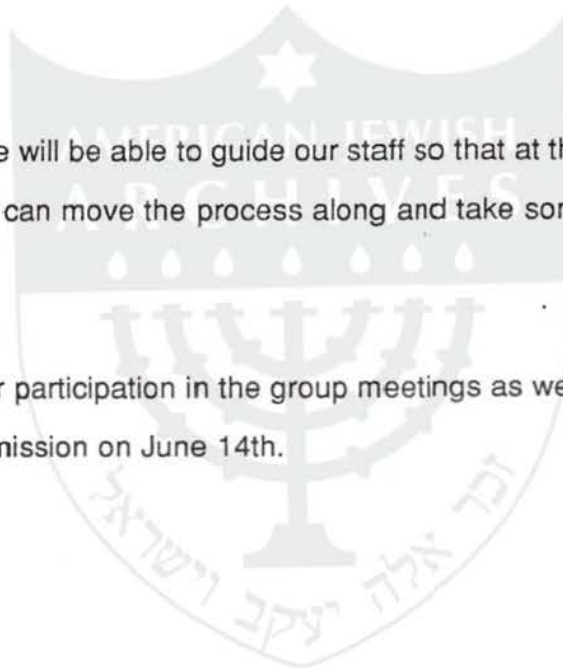
respond to these ideas and consider our next steps together. Several of you have suggested that this might best be done in a setting where there would be ample opportunity for each and everyone of us to fully discuss these matters.

I was, therefore, pleased that two of our commissioners - Charles Bronfman and Lester Crown - have agreed to host meetings of Commissioner before our next full meeting of the Commission on June 14th.

We will be in touch with you to try and coordinate schedules as effectively as possible.

At these meetings we will be able to guide our staff so that at the next meeting of the Commission, we can move the process along and take some concrete decisions.

I look forward to your participation in the group meetings as well as at our next meeting of the Commission on June 14th.





Fa 11 2-Week

3/30 - Policy Advisors

MLM, AJN, HDS, DA, JR, AR, JW, SF, AH, VFL, Herbert Millman, SHH,  
copy to CS, HLZ

~~Review~~ Review of agenda - Introduced Herb Millman

## I. The Concept

142BM

### A. Re Underlying Assumptions

- Too unidirectional. Work at local level + sig. change at nat'l level must go together.
  - Strengthen by more direct reference to the nat'l agencies. ISE may have a role w/ JWB, JESNA, Yeshiva, Brandeis, etc.
  - Important to talk about the processes of change - at nat'l + local level. How does change occur? How do nat'l + local interact - interventions, support system.
- Set up local consultations on what happens.
- SF: suggests AR + JW draft language to add to document on this HDS - concept of relationship of this central instrumentality to nat'l bodies is central to ISE concept. - How does it fit into nat'l framework.

DA - Problem w/ formulation, not w/ conclusion.

Formulation - ~~does~~ omits nat'l approach.

MLM - Missing omission.

AR - Underlying assumption → strong case for local initiatives, locally supported.

MLM - A third force - The energy to work w/ nat'l organizations as well as w/ local.

(2)

What would we build in?

AR - Assumptions re local / nat'l.

Ex: what does a local fed. need <sup>from</sup> outside the local community  
- GA? , - training resources , etc.

JW - There are routine + special processes currently underway  
(JWB, Cleve. Commission, Detroit, etc.)

Document begins w/ assumption that Nam. Fed is in a steady state, but not so. More dynamic.

- Commissions already in place -

Is ~~#~~ IJE a resource that can come in + give a boost or stay away from cities where things are happening?

NLM - IJE not a service-providing agency. It can choose locations to go into or not.

JW - Does IJE have max. impact plugging into processes underway as well as going in + starting something new?

AR - Are we talking about something on a local level that self destructs or develops a life of its own?

NLM - IJE - a limited mission - to stimulate + catalyze.

AR - Then IJE shouldn't develop entities that are independent, but should be part of existing institutions. Federation belongs in document.

ATN - IJE has to be something on nat'l level that can do what no other org. can do. Must provide support for nat'l orgs. - Issues shd. be explicit re nat'l.



ATN - On local level, ~~parents~~ develop prototypes - models that can be applied elsewhere.

Be clear nationally on position.

SF - IJE will have to decide on its relationship to local commissions & activities. May pick & choose.

- National to local - must be worked in.

- How to benefit fr. contribution from nat'l?

- Will ~~never~~ deliver services locally. Must work closely w/ nat'l grps. for diffusion to occur.

DA - Have to anticipate counter assumptions - i.e. - denominations, could solve the problems (SF - no training inst or sem. can solve probs of profession bldg.)

Need to anticipate assumptions that others might offer.

SF - The nat'l institutions, as currently ~~handled~~ structured, can't handle the "interdisciplinary" nature of what's going on locally.

JW - For a local community to ~~offer~~ address local issues, requires initiatives at nat'l level. ~~See~~

ATN - Purpose of IJE - identify local problems & seek out nat'l solutions.

SF - IJE will serve as broker & be responsive to proposals from outside - We tilt in local direction because scope is more manageable.



NLM - An assumption - The existing network of ~~a~~ institution in America won't have \$ or capacity to bring about the outcomes we seek.

- Final report of Commission isn't enough. Com. outcome shd. be a way to enhance the likelihood of implementing goals of J. cont. → an institution to seek resources & implement change locally. Free to experiment, innovate. In local communities, in conj. w/ Federations, linked appropriately to denominations.
- IJE's role must be unique.

JR - The notion that IJE is free to experiment must be examined closely. How do you balance the excitement, money, ideas w/ the realities of what is already going on?

DS - ① Must be an effort to capture the "juice" of the Commission. This is a way of mobilizing the resources of the "

② Must establish relationship to current nat'l bodies. Not another nat'l org. Must indicate how this wd. work.

③ Document shd. refer to the fact that there's a lot going on now. Needs an org. - (definable instrumentality) w/ flexible use of resources.

TH - Who invites the IJE to a community?

- There are always processes going on. Don't have to limit experimentation.

IJE -

LM - (An important addition that will enhance our power.

### 3. Bringing about Change

- AR - Are these instrumentalities set up for a limited time?  
How long will the ISE be involved. Needs a plan  
(having an ending pt. helps to galvanize action)
- DA - Remember the commissioners press for programmatic options. Build in a statement which explains connection bet. this approach + prog. options.

Could we end up working w/ just one institution in a city?

H - Shouldn't preclude the possibility of ~~using~~ using one org. as an appetite whetter.

AR - If we limit ourselves to local site, we may preclude lots of good possibilities.

MLM - the key to change in J. ed. is the Federation

FIN - Key = create mechanism locally in partnership w/ Fed. -  
Mechanism then determines who it works with

JW - Key = how we work, not who we work with

Risky to dissipate ISE's energy by working w/ a single inst.  
General consensus - No, but keep it on the books as a possibility

HDS - We know ISE will evolve. Our responsibility is to clarify design + framework. Watch out not to turn into a foundation having to respond to proposals.  
Initial proposal shd. be crystal clear re nature of community interactions.

H - Maybe we shd. think about a Nat'l Foundation for J. Ed.  
- separate from ISE



W - There's enormous overlap bet. some of ideas for IJE + some of what CTF + JESNA do. They can broker + for single institutions. We shd apply the test of which of the roles for IJE are unique.

MLM - We shd. write a P that it's understood that engineering must take place among IJE + JESNA, CTF, IWB, etc. Also, key institutional leadership shd. sit on its board - ad personam

The issue of scope is a problem to be considered further.

An issue for constant review = IJE shd. help to set projects up + get out. ~~It shd. bld in its end.~~ Creates change + goes on to something new.

N - IJE shd have resources + capital to develop initiatives on local level. (MLM - eventually)

S - ~~thinks it's hazardous to develop~~

- We need to build in structured ways (seminars, programs, communications, data collection + analysis) to convince ~~it~~ others to pick it up. ~~D~~ = diffusion

4 - Are there models? ATN - Intermediary organizations.

AH - Guiding models - Manhattan Project, generic notion of industry trying to design + test prototypes.

DA - How many prototypes can be developed at once? Depends on staff size, etc.

- No such models in education. We have to learn as we go.



4H - Before deciding how many, think what is the scope (min - max) for workability.

Where do we go from here?

1. Ask SF + 4H to do another draft for comment. <sup>3-4 weeks,</sup> then feedback
2. Decide today whether or not there's an alternative to be pursued.  
(alt. to a successor mechanism to Con.)

SHH - An alternative is to pick 1 or more projects, go in and do it. A real demonstration center. IJE more likely to bring about systemic change.

- We should encourage grps. to consider, develop competing models to be compared to this + reacted to in some careful way. Maybe develop a p. on each of 2 or 3 others. Anyone w/ an idea shd. send it in to AJN.

## LUNCH

## II. Involvement of Denominations in work of Commission

- MLM asks for a list under each of the grps. -
- who are the players + what are their roles.
- JW will do + send to AJN - confidential.

What's our objective?

- SF - Communicate w/ denom. - when IJE is working in a community, ea. denom. wd. participate.
- MLM - Primary linkage = ~~the~~ Federation (as best agent for change)

MLM (cont) - How does den. fit?

SHA - Role of Fed. = convening. Staff shapes process (manages)  
 Content is provided by denominational & other community leaders  
 beyond Cleveland

Is this a workable scenario? Yes.  
 Federation alone can't be a change agent.

JW - When a process is designed that allows for involvement of local den. leaders, eventually they do get tog. w/ Fed.  
 Good guide on local level, not national.

JR - ① Denominations have more power in personnel area than in others. No system, but that's where kids are.  
 ② Process of change in denom. world is much slower than in federations.

JR - In practice, many federations would be less effective as a convenor/galvanizer than earlier stated.

F. Suggests denominations are the vehicles. When they begin to compete, things will move faster. We create the climate in which denom. can be the best they can be.

What should be done?

MLM to meet w/ Lamm, Schorsch, Gotteschalk along w/ JW or AR + discuss.

- Do we risk one of them saying "I'm your link to the denom."

> Shd. go in w/ a logical scenario in mind.

reclusion: ① JW assignment ② MLM will arrange mty. of himself w/ AR or JW [they'll decide]. ③ Will go w/ a concept of what shd be said

- GF - ~~Goal~~ Goal - To leave w/ agreement that the leader has provided a mechanism to involve the denomination. So in w/ question: What's the mechanism?
- w/ Orthodox - ask - how do we approach Torah U'Mesorah w/out (abandoning) our commitment to centrist orthodoxy

### III. Final Report - rolling outline

A. ASN on outline

XX Distribute Joel Fox paper to Sr. Pol. Advisors  
JW, AR, HBS

Do we want a best practices review?

- If so, do w/ an eye toward legitimizing the ISE concept. Community model. - NO - <sup>not in final report</sup>

Do we want a vision of an ideal scenario? - YES

Re best practices, AR suggests a review a effective programs + come up w/ the necessary preconditions to ~~effective~~ success.

F - a good idea to commission such a report. Final report might indicate that this has been commissioned, rather than presenting a final study.

S - Vision shd. drive the document. Put near the top.

State of the Field. A critique / sweeping review. It would be ~~and~~ another good by-product of Commission.



State of field. - gives sense of urgency + emergency.

DS - Issue of J. cont. situation belongs at fore.  
J. ed. as a vehicle.

I. <sup>named</sup> ~~rewritten~~ : Jewish Continuity at Risk

We shd. try to answer the question - How do we know there's a link bet. J. cont. + J. ed.

> set link bet. J. ed. in America + contemp. Am. Jewish  
time to begin writing this first section of report. (after June)

MLM Suggests - ~~press~~ Put together an outline [design]  
steps to be taken to get ~~to~~ the papers  
written for the final report.

W - Think of papers in 2 ways.

1 - internally produced

2 - externally produced

" - Suggests a "thought piece" - Alternative scenarios for the content of the final report.

[JR] - Will do it w/ internal staff.

Then we'll get out to Sr. Pol. Adv. for critique - to be finalized by June.

JR - ~~will~~ Would like feedback on exhibit 4.

## IV. PR Status Report

A. AJN - announced we've engaged PBC - June mtg. Should be an event.  
 Put tog. a committee - MLM, SHH, DA, BY, HLZ, AJN, VFL  
~~SE~~

~~Draft letter~~ - What about an article now?  
 Why this grp. has convened? Public/Private partnership,  
 X DA - Ask editor of Moment to do a dialogue w/ MLM  
 or NYT Sunday mag. or Ed. Section.  
 - Coverage in NYT for June mtg.

MLM will put PBC tog. w/ Henry Eaton

Assignment to MLM - Call Hirschel Blumberg + Paul Berger

Wall St. Journal, NYT, Moment

B. The letter

Add:

Bronfman - NY } do by phone, f.u. w/ letter  
 Crown - in Chgo }

① Reference to some mechanism as follow up to Com.

② list some of the questions that have surfaced

The letter shd. be the invitation to May mtg. + bring up issues.

6 Comm. have been invited to the educators mtg.

Invite everyone to the 2 mtgs.

The letter will reflect the agenda from 3/30.  
 Be invitation. Update.

Refer to outcome.

## Content of small group meetings

Are we far enough along on ISE to present it to small groups?

- SF - Part 1 - Series of points that led to ISE  
 Part 2 - Review of ISE concept. (Have to decide by 4/15)

Crown wants to send a letter - to discuss a, b, c + anything else on your mind. If we're reviewing a document, send it ahead.

SHH - It looks like a railroading if we present a document. Discuss outcomes w/ invasion. Anything written conveys too much closure w/out them.

JW - Let's work back from June. - That's the time for closure. May = time for input. Raise the issues. #1

R - Have to assume that there's some awareness of the mechanism out there.

A - Are the issues from today's agenda enough to bridge? Introduce vocabulary + conceptual framework for June mtg. Interdependence. Nat'l/local. Treating whole community. Reflective innovation.

\* Share the problem + emerging assumptions. Not the conclusion.

;- Commissioners ~~do~~ assume staff's been working. Commissioners id. know they're not being manipulated or ignored.



mtg. purpose. - To get input on major questions -  
w/ sense that there will be something beyond  
comms.

List some of the issues + questions. Indicate  
that at the June mtg. something concrete  
will be presented.

- + - Commissioners shd. have a sense of being engaged. .  
How? This mtg. is the beginning of coming to an outcome.
- - Here are the issues + questions the staff is grappling  
with. Looking for input, suggestions.

Is this a mini - Commission mtg. or is it an ad hoc,  
unstructured "show + tell" meeting.

FR - June mtg. is critical as decision making. Shd.  
have a different agenda from May mtg.

mt - May mtg. - To give sense of ownership.

H - Initially a way to involve a few key people. Now looking  
like a mini mtg. in form of consultation. Maybe we're  
better at consultation 1-on-1. Advises that we  
consider what + + - might come from this.

- - 2 issues for June mtg. - Do you accept the assumptions?  
Do you accept the conclusions?

M - How about holding the meeting and also identify  
people who need to be seen 1-on-1.

We're prepared to share w/ Commissioners our concerns re underlying assumptions, etc. Keep them informed.

SN - Model for meeting - Share beginnings of framework - share ideas. More useful for commissioners to engage each other than just 1-on-1.

Attached to ~~Bronfman's~~ ~~Lowy's~~ letters shd. be a document that ~~listed~~ lists issues.

The letter shd. be on Commission letterhead inviting to either meeting. Crown + Bronfman write confirming, follow-up letters.

## II. Commissioner Contact

I'll keep master + bring to mtgs. Each counselor wd. have their own. - When anyone <sup>meets</sup> people, they must send written report.

A. Those <sup>who must</sup> be seen personally before June  
Berman  
Corson  
Evans  
Field (if he goes to W. Coast)  
Fisher  
Gins  
Herschhorn  
Jaselsky  
Milton  
Schiffman, Appelby, Roschitzky (SR)

Decide on trip to LA depending on who comes to reg. mtgs.

Shapiro - AR	Lipsit
Tushman	Truesky
Kottichall	Kranberg
Lamm	<del>Schiffman</del>
Schwarz	Schulman
Green	Zelen

Kottschalk shd. call Zeldin in advance  
Deadlines - Ideally - May 1

Agenda of ind. mtgs = same as grp. mtgs. - Feedback  
on ideas.

F. Progress report on outreach

A. Educators -

Will go over the series of issues & emerging  
assumptions

B. Outreach - Progress Report.

II. Tentative Dates for Next Mtgs

Oct. + Feb.

✓

4

11 second choice



SF

B. Theory <sup>in d.</sup>

1. No place where a prototype can be built. - Must build a concept & test it.

2. No place, after prototype has been built, where it can be put in place & learn from mistakes.  
Constant, on-line fine tuning. Feedback loop.

MLM - says this point shd. be made in the document.

This is a precondition for understanding it.

Underlying Assumption

A demonstration center = the means to fine tuning.  
Mechanism - to build the prototype - force manage.

#

Issue of where the work is done - where the brain power comes from - Need a quality staff  
"doing" - ii - demands staff in one place & able to do a lot of work before burning out.

ccmar

1- It's difficult to institute significant change. What's the strategy to overcome resistance?

2- ii = generating force as well as catalyst. Has to be a person (central figure) who can take the work.

## Seymour A. Assumptions

1. ~~Full~~ Don't think that these issues could be approached on national level. Has to be done locally. There are currently no programs which, if replicated, could "solve" the problems we see.

Strategy - do locally. Show it can be done.  
[There's nothing to replicate.]

2. Assume there are solutions. It can be done. Have lots of ideas how.

[There are things that can be done.]

3. No ~~attention~~ of being "top-bottom." The community will have to take action.

> There is so little talent today, <sup>in this field (or context)</sup> ~~for~~  
No common work going on →

- There are Jewish educators not working in the J. education
- There are people who would gladly play a role

→ The resources for involvement are there. "trying to make a contribution."

No local community, <sup>or organization</sup> could bring this talent together.

Need to force manage to get this talent together.

Not talking about "dropping <sup>general</sup> programs" just community.

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MINUTES: Senior Policy Advisors Meeting  
DATE: March 30, 1989  
DATE MINUTES ISSUED: April  
PRESENT: Morton L. Mandel, Chairman, David Ariel, Seymour Fox,  
Annette Hochstein, Stephen H. Hoffman, Virginia F. Levi  
(Sec'y), Arthur J. Naparstek, Joseph Reimer, Arthur  
Rotman, Herman Stein, Jonathan Woocher  
GUEST: Herbert Millman  
COPY TO: Carmi Schwartz, Henry L. Zucker

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I. Review of the IJE Concept

A. Underlying Assumptions

There was extensive discussion of the underlying assumptions to the draft concept paper.

1. It was suggested that work at the local level and significant change at the national level must occur simultaneously. The paper should refer to national agencies and to the possible relationship of IJE to JWB, JESNA, Yeshiva, Brandeis, etc. The ways in which the national and local bodies interact to create interventions and support systems should be spelled out more clearly.

2. The document implies that North American Jewish education is in a steady state. It was suggested that this is not the case, but that a dynamic environment already exists as evidenced by

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the existence of local commissions on Jewish education. Does the IJE have maximum impact by plugging into processes already under way, by starting at the beginning in communities not already engaged, or through some combination? It was noted that, because the IJE would not be a service providing agency, it would be in a position to select locations where it could serve as an effective resource.

3. The mission of the IJE is to stimulate and catalyze. It should get things going on a local level and withdraw when a local effort can become self-sustaining. In light of this approach, the IJE should develop entities that are part of existing institutions in local communities; the local federation should be dominant.
4. The IJE should function at the national level to do what no other national organization can while working on the local level to develop prototypes or models which can be applied elsewhere. It will not provide service on the local level. It will work closely with national organizations for diffusion purposes (application of lessons learned in one city to others). The IJE is intended to identify local problems and seek national solutions.
5. We should anticipate counter-assumptions and speak to them in advance. One such assumption might be that the denominations

or training institutions are a means to solving the problems of personnel and community.

6. We must assume that the existing network of institutions in America has neither the money nor the capacity to bring about the outcomes we seek. In addition to a written report, an outcome of the Commission should be a way to enhance the likelihood of implementing goals for Jewish continuity: an institution to seek resources and implement change locally. This body should be free to experiment and innovate in local communities, in conjunction with federations, and link appropriately to denominations. The IJE's role must be unique.

The IJE is a means of mobilizing the resources of the Commission. It must establish a relationship to current national bodies without becoming another national organization. The document should indicate how this would work while noting that there is much happening at present.

B. Bringing About Change

A discussion of the section of the concept paper entitled "Bringing About Change" yielded the following suggestions:

1. It would be useful to develop a plan which would include a time frame within which the IJE would work with a local community.

2. Many commissioners retain strong interests in programmatic options. It would be useful to build a statement into the paper explaining the link between the IJE approach and the programmatic options.
3. In defining a community action site, discussion turned to the question of whether the IJE should consider working with just one institution in a city. The conclusion was probably not--that the key to change is to create a mechanism to work locally in partnership with the federation--and that working with a single institution would dissipate IJE's energy. However, the concept of working with a single institution will be kept on the books as a possibility.
4. It is clear that the IJE will evolve over time. Our responsibility at present is to clarify the design and framework and to be as clear as possible regarding its goals.
5. There is overlap between some of the proposed responsibilities of IJE and much of what CJF and JESNA currently do. In clarifying the role of IJE, we should apply the test of where its contribution can be unique. It was suggested that a paragraph be added to the document indicating that it is understood that engineering must take place among IJE and JESNA, CJF, JWB, and others. In addition, key institutional leadership should sit on the IJE board.



6. The issue of scope must be considered further. It was felt that the IJE should have sufficient resources and capital to develop initiatives on the local level. In addition, structured means should be developed (i.e. seminars, programs, communications, data collection and analysis) to enhance diffusion.
7. While there are no models for the IJE within the field of education, we are aware of similar intermediary organizations such as the Manhattan project, LISC, and the Enterprise Foundation which have successfully implemented similar concepts in other fields.

C. Next Steps

Participants were asked to review the remainder of the document and to submit comments to AJN. In addition, group members were encouraged to consider competing models and to submit them in writing to AJN for dissemination and review.

II. Involvement of Denominations in the Work of the Commission

- A. JW will prepare a list of the critical groups within each denomination, the major players, and their roles. This will be sent to AJN and marked confidential.

B. What is our Objective?

1. We should be in communication with each denomination so that when the IJE is working in a community, each denomination would participate. While the federation serves a convening role and IJE staff shapes the process, the content might be provided by the denominations and other community leaders.
2. The denominations have power in the area of personnel because that's where most of the children are. While the process of change in the denomination world is often slower than within federations, if we can encourage a competitive atmosphere, we might create a climate in which denominations would move more quickly.

C. What should be done?

It was suggested that MLM meet with Lamm, Schorsch, and Gottschalk as well as JW or AR. Each leader should be asked to help develop a mechanism to involve that denomination. With respect to Torah U'Mesorah, the question should be "How can we approach Torah U'Mesorah in light of our commitment to Centrist Orthodoxy?"

III. Final Report - Rolling Outline

A. General Outline

A proposed outline for a final report was reviewed and discussed. It was agreed that a document on vision is important as a rationale for the IJE concept. A review of the state of the field provides

a sense of urgency and emergency. The issue of Jewish education as a vehicle for Jewish continuity belongs at the forefront of the document.

B. Commissioning Papers

The first section of the report might be called "Jewish Continuity at Risk." In this section, the link between Jewish continuity and Jewish education should be established. Work might begin on this first section of the report after the June Commission meeting. JR will draft a thought piece on alternative scenarios for the content of the final report. This will be reviewed by internal staff and then distributed to senior policy advisors for critique. It should be completed by June.

JR requested that policy advisors review Exhibit 4--"Commissioning Papers"--and provide him with feedback.

IV. PR Status Report

- A. It was noted that we have engaged Paula Berman Cohen to coordinate public relations efforts and have established a PR Committee comprised of David Ariel, Paula Berman Cohen, Stephen Hoffman, Virginia Levi, Morton Mandel, Arthur Naparstek, Charles Ratner, Bennett Yanowitz, Henry Zucker.



It was suggested that the June Commission meetings should be an "event." We should begin now to establish links with such publications as Moment, the New York Times, and the Wall Street Journal. MLM will arrange for Premier's PR representative to work with PBC in establishing contacts with the New York Times and the Wall Street Journal. MLM will also call Herschel Blumberg and Paul Berger in an effort to interest Moment in the Commission.

B. Interim Letter to Commissioners

A draft letter to commissioners was reviewed. It was suggested that such a letter, to go out by April 15, should serve as an invitation to regional meetings and an update on activities since the December 13 meeting and should refer to a possible Commission outcome in the form of an implementation mechanism.

C. Content of Small Group Meetings

It was noted that Charles Bronfman and Lester Crown have agreed to host regional meetings in New York and Chicago, respectively. In addition, commissioner educators are scheduled to meet in New York on April 5. Following an extensive discussion, it was concluded that the concept paper should not be distributed prior to these meetings. Staff will share the issues and emerging assumptions, but not the conclusions. The purpose of the meeting should be to get input on major questions and to provide participants with a sense that there will be something beyond the Commission.

Commissioners should be engaged at the regional meeting and should have a sense that we are approaching a recommendation which we intend to make at the June Commission meeting.

The letter inviting commissioners to the regional meetings should be on Commission letterhead, should invite all people to either meeting, and should be accompanied by an outline of the issues under consideration. Confirmation letters would come directly from Crown or Bronfman.

V. Commissioner Contact

Group members assigned to contact individual commissioners will submit a written report on each such contact. VFL will keep a master book on commissioner contact and will bring it to each meeting.

The group reviewed the list of commissioners and determined which should be contacted individually prior to the June 14 meeting. A summary of those decisions is attached.

VI. Outreach

A. Progress Report

A memorandum by JR setting forth a list of organizations in need of contact and recommendations for the nature of that contact was reviewed. This will be presented to the Public Relations Committee.

B. Educators Meeting

It was agreed that at the April 5 meeting of educators the issues and emerging assumptions discussed at this meeting would be reviewed, discussed, and further refined.

VII. Tentative Dates for Future Commission Meetings

It was agreed that we would tentatively plan Commission meetings to occur in October 1989 and February 1990. The two October dates, which will be checked with our group of critical participants, are October 4 and (second choice) October 11.





MINUTES: Planning Group Meeting  
Commission on Jewish Education in North America

DATE: March 29, 1989

DATE MINUTES ISSUED: April

PRESENT: Morton L. Mandel, Chairman, Seymour Fox,  
Annette Hochstein, Virginia F. Levi (Sec'y),  
Arthur J. Naparstek, Joseph Reimer, Herman D. Stein,

COPY TO: Henry L. Zucker

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I. Introduction

The chairman welcomed planning group members and reviewed the agenda for the day. This was followed by a brief review of minutes of the planning group meetings of February 7-9.

In a report on activities since the last meeting, it was noted that work has focused on the issue of implementation in preparation for this meeting.

II. The ii Concept

Much of the day was spent in careful review of the paper proposing "An Instrumentality for Implementation."

A. The following general issues were raised:

1. Semantics

Discomfort was expressed with the use of the terms "instrumentality for implementation" and "demonstration center." The alternatives which were suggested and agreed

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upon, for the present, are "initiatives for Jewish education" (IJE) and "community action sites."

2. The need for "bottom-up" rather than "top-down" management should be clearly stated. This assumes that the focus of the IJE is to work with communities to help them decide upon their needs and goals. It is important to be aware that these needs will vary by community. The goal: to help each community be the best it is ready to be.
3. It is important to reflect in this document an intent to optimize the full potential of existing national resources (JWB, Brandeis, CAJE, etc.).
4. Community can be defined to encompass the "enlarged federation family": the local federation, denominations, and synagogue movement.
5. How do we know that there is interest in the services of the IJE? We might consider building in a pilot project so that a design might be tested before the entire project is launched.
6. A clearer sense of the organization and related costs is needed.

7. It would be useful to identify potential sources of resistance and to develop strategies to overcome the resistance.
8. This concept is dependent upon finding an effective leader.
9. The IJE should be an "intermediary organization" capable of convening groups that might not otherwise come together. It should have the power to leverage funding. It should assist with program design as well as monitoring and evaluation.
10. It is not yet clear whether the IJE will be able to provide funding. It may operate on the prestige and ability of the board, the staff, and their ideas. It was noted that if the IJE were responsible for fundraising on an ongoing basis, this would detract from its central purpose.
11. In the organizational design it was suggested that the term "professional advisory board" replace "academic team."

B. Introductory Remarks

As a preface to a careful review of the concept paper, SF and AH made the following remarks:

1. The concept paper assumes that the issues of personnel and community must be approached on the local level. It also



assumes that there are currently no programs which, if replicated, could solve the problems in the field. The strategy is to approach the problems locally and demonstrate that there are things that can be done to improve the situation.

2. It is assumed, further, that there are talented people who, under the right circumstances, could be encouraged to contribute and get involved. However, they must be identified and brought together to take action. It is believed that no local community or organization could bring this talent together, but that this is a role for IJE.
3. This would not be a dropping of "generic programs" into communities, but a process which would be carefully tailored to each community involved.

C. Assumptions

1. It is assumed that there is no place in Jewish education where a prototype can be built. This means that a concept must be developed and tested.
2. There is no single location where, after a prototype has been built, it can be implemented and fine-tuned for general application. Instead, there must be constant on-line fine

tuning. This is the concept of the "feedback group." It is the purpose of the IJE to build the prototype and of the community action site to serve as the means of fine tuning. The purpose of the IJE is to facilitate programs that deliver service, not to deliver the services itself.

D. Other Issues

1. The IJE represents a set of goals. Dealing with personnel and community is a means to reaching our goals. By the nature of this endeavor, the programmatic options will be involved. Personnel will be developed for specific programs.
2. Is personnel, by its nature, limited to long-term results? It is believed that through the recruitment process, new energy can be infused into a community relatively quickly.
3. One goal is to identify local problems and seek national solutions.

The foregoing discussion accompanied a careful review of the concept paper. Suggestions were made for revision of the paper which were incorporated in a rewrite prepared for presentation at the senior policy advisors meeting of March 30.

E. Tentative Timetable

The following tentative timetable for implementing the IJE concept was proposed:

- June 1989 - Commission meeting - general agreement to the IJE concept.
- November 1989 - present the final paper on the concept and the beginning outcomes of a director search.
- February 1990 - present the director to the Commission.
- June 1990 - first report of the IJE director; first meeting of the IJE board.

III. Commissioner Contact

The group discussed the nature of contact to occur with commissioners prior to the June 14 meeting. It was agreed that the commissioners should be given a sense of the issues and, to the degree possible, we should have consensus on the general concept of the IJE.

- A. Charles Bronfman and Lester Crown have agreed to host regional meetings in New York and Chicago, respectively, on May 8 and 9.
- B. In addition, a meeting of commissioners who are Jewish educators is scheduled to take place on April 5 in New York. Depending on the outcome of this meeting, participants may be asked to attend regional meetings, as well.



C. At these meetings and in any contacts with commissioners, it will be important to test their views without manipulating them.

D. The nature of the interaction at these meetings and in one-on-one meetings with specially identified commissioners was reserved for discussion with the senior policy advisors on March 30. It was agreed that a talk sheet would be developed by no later than April 15 [by SF and AH?] and would include a list of items to discuss, items not to discuss, and potential risks. In addition to members of the planning group, our representatives from JWB, JESNA, and CJF should review and approve this document.

IV. Preparation for March 30 Meeting of Senior Policy Advisors

The agenda for the March 30 meeting of senior policy advisors was reviewed and revised in light of this meeting.

Meeting of Commission Planning Group  
March 29, 1989

Agenda

- |         |   | <u>Exhibit No.</u> |                      |
|---------|---|--------------------|----------------------|
| ✓ I.    | Welcome and review of agenda  |                    |                      |
| ✓ II.   | General update since last meeting; <del>review</del><br>of assignments  | 1                  | AJN                  |
| ✓ III.  | The ii concept  |                    |                      |
| IV.     | Discuss ways to fully involve leaders from the<br>denominations in our work; Rabbi Zeldin<br><i>WA. outreach &amp; Networking</i>                                       | 2                  |                      |
| V.      | Review Commission report - rolling outline  | 3,4                | AJN                  |
| ✓ VI.   | Review commissioners; plan nature of contacts to<br>occur with commissioners before 6/14 (regional<br>meetings); use of Senior Policy Advisory Board?<br><i>Network</i> | 5, 5a              | ←                    |
| ✓ VII.  | Commission work plan between now and 6/14   | 7                  | ←<br><i>see plan</i> |
| ✓ VIII. | Review Agenda for meeting of March 30; Do we need<br>to regroup following the 3/30 meeting? If so, when?  | 6                  |                      |
| ✓ IX.   | <i>Review &amp; assignments</i><br>Discuss Planning Group work schedule for balance of 1989   | 1                  | ←<br>←               |
| X.      | Discuss tentative dates for 4th Commission meeting  |                    |                      |
| XI.     | Review draft of letter to commissioners   |                    |                      |

*Copy to I see Elliott*  
*148 BM*

Meeting of Commission Planning Group  
March 29, 1989

Folder Contents

The following materials are contained in this folder for reference during the March 29 meeting of the Planning Group of the Commission on Jewish Education in North America:

Exhibit No.

0. Agenda
1. Assignments
2. Memorandum on the Commission and the Denominations
3. Outline for Final Report
4. Memorandum on Commissioning Papers
5. Suggested Contact with Commissioners, 3/30/89 - 6/14/89
- 5a. Commissioner Contact Sheet
6. Proposed Agenda for 3/30/89 Meeting of Senior Policy Advisors
7. Draft Work Plan, January to June, 1989
8. Minutes of Planning Group Meetings, 2/7/89 - 2/9/89

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Meeting of Senior Policy Advisors  
March 30, 1989

Proposed Agenda

- I. Progress report (12/13 to 3/30) - From enabling options to implementation mechanism; how did we get there?  
  
The ii concept
  1. What are the advantages?
  2. What are the limitations?
- II. Are we ready to present the concept of ii to the Commission? If yes, how?
  - A. Before 6/14
  - B. On 6/14
  - C. Other
- III. PR status report
- IV. Progress report on outreach project; meeting of educators JR
- [V. Other - to be determined at 3/29 meeting - may include:
  1. Discuss ways to fully involve leaders from the denominations in our work
  2. Review draft of letter to commissioners]

150 BM

## MEMORANDUM ON THE COMMISSION AND THE DENOMINATIONS

## 1. THE PROBLEM

- a) By denominations, we mean the national and local synagogue and rabbinical organizations as well as additional groups such as Torah U'mesorah.
- b) As the Commission approaches the stage of recommendations, and thereafter implementation, the denominations, who are the major deliverers of educational services, are likely to feel that they have not been involved in the decision-making process.
- c) The denominations may respond by complaining, refusing to participate, or worse.

## 2. POSSIBLE APPROACHES

- a) Invite the denominational groups to join the Commission.
- b) Invite them to participate in whatever groups (taskforces, sub-committees, etc.) are given the responsibility to deal with the content of the recommendations of the Commission, e.g. the iii.
- c) Invite them to join the board of the successor to the Commission or the board of the ii.

## 3. STEPS TO BE TAKEN

- a) MLM should meet with the presidents of the institutions of higher Jewish learning (Y.U., J.T.S., H.U.C.) and discuss how to begin the dialogue with the denominations. Lamm, Schorsch and Gottschalk have different positions and degrees of influence and sensitivities to their denominational constituencies.

Commissioners who play an important role in a denomination (Melton, Ratner, Jesselson, Koschitsky, etc.) might participate in these meetings, along with staff.

- b) These meetings will help us to decide how to proceed.
- c) We might choose from among the "Possible Approaches" listed above.
- d) New or different approaches might emerge at these meetings.
- e) A different approach might be adopted for each denomination.

156BM

*Jon Woodner writes glowing-analytic paper*  
*MLM / JW 2/a 11 will go to Lamm & int. (Lamm, Schorsch, Gottschalk)*

Exhibit 3

Outline for Final Report

*Continuity at Risk*  
I. Jewish Education at a Crossroad

- A. A changing Jewish community
- B. Who are we losing?
- C. Requirements of Jewish continuity
- D. What is the proper basis of Jewish education? — solution

II. What is the State of the field? } Data Please

III. The Opportunity

- A. Wave of Consciousness in the Diaspora
- B. Wave of Programs and Innovation  
(see Joel Fox paper)

*the Bible*  
IV. Best Practises

- ← A. One vision - What is one ideal scenario for the next Millenium

V. One Plan

One New Framework:

enabling options ---> personnel community ---> programmatic options

VI. Implementing the Plan (Innovation Model)

- A. Innovation through
  - 1. Partialization
  - 2. Prototype based on a partialization process

VII. Conclusion

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AH  
Exhibit 5

3/28/89

Commission on Jewish Education in North America

Name	Assignment	Suggested contact between 3/30/89 and 6/14/89
I. LAY LEADERS		
1. Mona Ackerman	AJN	<i>Not to visit based on ii prayer</i>
2. Ronald Appelby	AJN	<i>Report on 3/30/89 12/13. Toronto visit needed</i>
3. David Arnow	JR	AH saw 2/89. Will call 4/89. If there is a small group meeting, no further contact needed.
4. Mandell Berman	AJN	<i>AH saw 2/89. Will call 4/89. If there is a small group meeting, no further contact needed.</i>
5. Charles Bronfman	SF	SF saw 2/89. MLM saw 3/89. Slated to host small group meeting.
6. John Colman	HLZ	HLZ will contact by telephone
7. Maurice Corson	HLZ	HLZ will contact personally
8. Lester Crown	SF	SF saw 2/89. MLM and SF will see 3/29/89. Slated to host small group meeting
9. Stuart Eizenstat	AJN	<i>January meeting. to meet</i>
10. Eli Evans	HLZ	HLZ will contact by phone or personally
11. Irwin Field	AR	
12. Max Fisher	MLM	
13. Joseph Gruss		
14. Robert Hiller	HLZ	HLZ will contact personally
15. David Hirschhorn	HLZ	HLZ will contact by phone or personally; SF is scheduled to see 4/3
16. Ludwig Jesselson	AH	AH will try to see 4/89 (difficult to arrange).
17. Henry Koschitzky	JR	SF saw informally 2/89.
18. Mark Lainer	JR/AJN	
19. Robert Loup	AH	AH will call 4/89.

3/28/89

Commission on Jewish Education in North America

Name	Assignment	Suggested contact between 3/30/89 and 6/14/89
20. Morton L. Mandel	AH	
21. Matthew Maryles	AJN	<i>Post r/p, phone debrief.</i>
22. Florence Melton	AH	AH will try to see 4/89.
23. Donald Mintz	AR	
24. Lester Pollack	AR	
25. Charles Ratner	SF	SF saw 2/89. Will call 4/89.
26. Harriet Rosenthal	AR	
27. Esther Leah Ritz	AH/AR	AH saw 2/89. Will see 4/5/89.
28. Lionel Schipper	AJN	
29. Daniel Shapiro	AJN	
30. Peggy Tishman	AH/AJN	
31. Bennett Yanowitz	AJN	<i>Debrief on original</i>
II. PRES, HIGHER ED		
32. Alfred Gottschalk	MLM/SF	SF called 2/89. Will see 4/89.
33. Norman Lamm	MLM/AH	AH will see 4/3/89.
34. Ismar Schorsch	MLM/AH	AH will see 4/3/89.
35. Arthur Green	JR	
III. SCHOLARS/EDUCATORS		
36. Seym Martin Lipset	SF	SF saw 2/89. Will see 4/89.

3/28/89

Commission on Jewish Education in North America

Name	Assignment	Suggested contact between 3/30/89 and 6/14/89
IV. JUDAIC SCHOLARS		
37. Isadore Twersky	SF	SF saw 2/89. Will see 4/89.
V. JEWISH EDUCATORS		
38. Jack Bieler	JR	
39. David Dubin	AR	
40. Joshua Elkin	JR	
41. Irving Greenberg	JR	
42. Carol Ingall	JR	
43. Sara Lee	SF	SF called 2/89. Will see 4/89.
44. Alvin Schiff	AJN	
VI. RABBIS		
45. Haskel Lookstein	AJN	AH saw 1/89.
46. Harold Schulweis	JR	
47. Isaiah Zeldin	JR	



3/28/89

Exhibit 5

Commission on Jewish Education in North America

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1. Mona Ackerman	AJN	
2. Ronald Appelby	AJN	
3. David Arnow	JR	AH saw 2/89. Will call 4/89. If there is a small group meeting, no further contact needed.
Mandell Berman	AJN	
5. Charles Bronfman	SF	SF saw 2/89. MLM saw 3/89. Slated to host small group meeting.
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8. Lester Crown	SF	SF saw 2/89. MLM and SF will see 3/29/89. Slated to host small group meeting
9. Stuart Eizenstat	AJN	
10. Eli Evans	HLZ	HLZ will contact by phone or personally
11. Irwin Field	AR	
12. Max Fisher	MLM	
13. Joseph Gruss	MLM + Schiff	
14. Robert Hiller	HLZ	HLZ will contact personally
15. David Hirschhorn	HLZ	HLZ will contact by phone or personally; SF is scheduled to see 4/3
16. Ludwig Jesselson	AH	AH will try to see 4/89 (difficult to arrange).
17. Henry Koschitzky	JR	SF saw informally 2/89.
18. Mark Lainer	JR/AJN	
19. Robert Loup	AH	AH will call 4/89.

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3/28/89

Commission on Jewish Education in North America

Name	Assignment	Suggested contact between 3/30/89 and 6/14/89
20. Morton L. Mandel	AH	
21. Matthew Maryles	AJN	
22. Florence Melton ✓	AH	AH will try to see 4/89.
23. Donald Mintz ✓	AR	
24. Lester Pollack	AR	
25. Charles Ratner	SF	SF saw 2/89. Will call 4/89.
26. Harriet Rosenthal	AR	
27. Esther Leah Ritz ✓	AH/AR	AH saw 2/89. Will see 4/5/89.
28. Lionel Schipper	AJN	
29. Daniel Shapiro ✓	AJN	
30. Peggy Tishman ✓	AH/AJN	
31. Bennett Yanowitz	AJN	
II. PRES, HIGHER ED		
32. Alfred Gottschalk ✓	MLM/SF	SF called 2/89. Will see 4/89.
33. Norman Lamm ✓	MLM/AH	AH will see 4/3/89.
34. Ismar Schorsch ✓	MLM/AH	AH will see 4/3/89.
35. Arthur Green ✓	JR	
III. SCHOLARS/EDUCATORS ✓		
36. Seym Martin Lipset	SF	SF saw 2/89. Will see 4/89.

3/28/89

Commission on Jewish Education in North America


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IV. JUDAIC SCHOLARS		
37. Isadore Twersky ✓	SF	SF saw 2/89. Will see 4/89.
V. JEWISH EDUCATORS		
38. Jack Bieler	JR	
39. David Dubin	AR	
40. Joshua Elkin	JR	
41. Irving Greenberg ✓	JR SW	
42. Carol Ingall	JR	
43. Sara Lee ✓	SF	SF called 2/89. Will see 4/89.
44. Alvin Schiff	AJN	
VI. RABBIS		
45. Haskel Lookstein ✓	AJN	AH saw 1/89. call?
46. Harold Schulweis ✓	JR	
Isaiah Zeldin ✓	JR	



Exhibit 5a

Commissioner Contact Sheet

Name \_\_\_\_\_ Assigned to \_\_\_\_\_  
Mailing \_\_\_\_\_ Off. phone \_\_\_\_\_  
Address \_\_\_\_\_ Home phone \_\_\_\_\_  
Fax \_\_\_\_\_ Telex \_\_\_\_\_  
Comments \_\_\_\_\_  
\_\_\_\_\_

Date	Nature of Contact/Status	Next Steps/Action Needed
		

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# Exhibit 7

April 1989			May 1989				June 1989			
12	19	26	3	10	17	24	7	14	21	28
er or Summar-										
t Steps - mechanism										

Debbie Let's talk of project logs, follow up & management of complex projects etc...

FROM THE SECOND TO THE THIRD COMMISSION MEETING  
FIVE MONTH PLAN: FEBRUARY-JUNE 1989  
FIRST DRAFT -- JANUARY 27, 1989

	1	8	15	22	1	8	15	22	29
	February 1989				March 1989				
I. RESEARCH & DEVELOPMENT	I. RESEARCH AND DEVELOPMENT								
A: DESIGN OUTCOMES	A. Design the Outcomes								
1. Draft Document	1. DPA								
2. Wise People -- Methodology	2. Wise				12.				
3. Brain-storm Planning Group	3.								
B. OTHER RESEARCH									
4. Research Design	4. Research Design								
5. Personnel: data & analysis	5. Research on Personnel								
6. Community: data & analysis	6. Research on the Community								
7. Case Studies	7. Case studies								
8. Visions Paper	8. Vision paper								
9. Carry out research design	9. Carry out research								
II. COMMISSIONERS INVOLVEMENT									
10. Small Group Meetings									
Meeting 1									
Meeting 2									
Meeting 3									
11. Educators Meeting									
12. Individual Interviews	12. Individual Interviews								
13. Letter or Summary									
14. Institutions on Board (P.R)	14. Institutions on Board								
15. Secure Attendance					15. Secure attendance at 3rd				
16. Send Pre-meeting Materials									
17. A Report to Their Publics	17. Report to Publics								
III. A MECHANISM FOR IMPLEMENTATION									
18. Define	18. A MECHANISM FOR IMPLEMENTATION								
19. First Steps									
20. Launching									
IV. STAFFING									
21. For Implementation	21								
Mechanism									
22. For research	22								
23. P.R.	23								
V. PUBLIC RELATIONS									
24. Approve Plan									
25. Approve Networking Plan									
VI. THE THIRD COMMISSION MEETING									
26. Define Expected Outcomes									
27. Set the Agenda									
28. Logistics									
29. Prepare Materials									
VII. STAFF MEETINGS									
30. February to Design Outcomes	30								
31. March for Small Group Meetings									
32. June 12-16 Plan & Debrief Meeting of June 14th									
VIII. ADDITIONAL ACTIVITIES									



March 28, 1989

TO: Arthur J. Naparstek

FROM: Joseph Reimer

RE: Commission Outreach to Jewish Educational Organizations

I have been asked to review the previous communications on the subject of Commission outreach to Jewish educational organizations and to prepare for the March 30 meeting of the planning group a list of organizations with whom we need to be in contact and recommendations on the nature of the contact.

The list and recommendations are based on the following assumptions. (1) Priorities for organizational contact need to be established. Educational organizations whose members most directly impact the anticipated work of the Commission need to receive higher priority. (2) Higher priority involves face to face communication between representatives of the Commission and the organizations. Lower priority may involve only written communication. (3) Outreach through larger organizational networks that avoids establishing separate contact with smaller organizations makes for smoother communication and should be preferred.



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I. Central Agencies for Jewish Education

1. Bureau Directors Fellowship (BDF)

Chairperson: Gene Greenzweig

*High Priority*

Recommendation: Given centrality of bureau directors to access to schools in local communities, we want to let them know about the work of the Commission and to gain their cooperation. (1) Establish contact with Gene Greenzweig. (2) Follow his lead for best way for Commission representative to meet with bureau directors. (3) Make available option of Commission representative addressing BDF at their Spring meeting in June. (4) Follow-up initial contact with possibility of future meeting (especially with big city directors) and written communication to all directors.

*JW*

*Ph. Gersh*

II. Jewish Educator Organizations

1. Conference of Jewish Educator Organizations (COJEO)

Chairperson: Dr. Hyman Campeas

Recommendation: Given that COJEO is the umbrella organization of the five constituent organizations of Jewish educators, it is a central address and an effective way to communicate with and gain the cooperation of Jewish educators. (1) Establish contact with Hy Campeas. (2) Ask him to set up a meeting that COJEO would sponsor at which representatives from the constituent organizations could meet with Commission representatives. (3) Follow-up initial meeting with written communication to Board members of each organization.

*SR*

*(Schiff)*

2. Coalition for the Advancement of Jewish Education (CAJE)

Executive Director: Dr. Eliot Spack

Recommendations: Given that CAJE most actively represents the largest number of grass roots Jewish educators, we want to use its formats to communicate to the field at large. We also want to gain the cooperation of the CAJE leadership. (1) Establish contact with Eliot Spack. (2) Invite him to define how Commission representatives could best communicate through CAJE to the membership. (3) Make available option of Commission representatives attending and addressing annual conference in August. (4) Follow-up initial contact with possible future meeting of CAJE board with Commission representatives, and (5) with written communication with broader membership.

*Ag at dinner*

*To passive*

III. Denominational Educational Bodies

1. Department of Education and Commission on Jewish Education, United Synagogue of America (Conservative)

Director: Rabbi Robert Abramson

2. The United Synagogue of America, Department of Youth Activities (USY/Kadima)

Director: Paul Friedman

Recommendation: As central educational bodies of the Conservative Movement, these organizations need to receive high priority contact from Commission representatives. (1) We turn first to Ismar Schorsch, as a commissioner and leader of the Conservative Movement, to ask how to best establish contact with these, and possibly other, educational arms of the Conservative Movement. (2) At his suggestion and under his direction we set up a meeting with the directors of these organizations. (3) We follow-up initial meeting with possibility of future meetings with directors of organizations and with written communication with members of their commission on education.

3. Department of Education and Commission on Jewish Education, Union of American Hebrew Congregations (Reform).

Director: Rabbi Howard Bogot

4. Union of Hebrew Congregations Youth Services Department

Director: Rabbi Allan Smith

Recommendation: That we follow for the Reform Movement the same procedure as above, starting first by turning to Alfred Gottschalk, etc.

5. National Commission on Torah Education, Yeshiva University (Orthodox).

Director: Dr. Mordecai Schaidman

6. Union of Orthodox Jewish Congregations, National Conference of Synagogue Youth (NCSY)

Director: Rafi Butler

Recommendation: That we follow for the Orthodox Movement the same procedure as above, starting first with Norman Lamm, etc.



7. Commission on Jewish Education of Reconstructionist Congregations and havurot and the Reconstructionist Rabbinical Association.

Director: Rabbi Jeffrey Schein

Recommendation: That we follow for the Reconstructionist Movement the same procedure as above, starting first with Arthur Green, etc.

8. Torah Umesorah, National Society for Hebrew Day Schools (Orthodox).

Director: Rabbi Joshua Fishman

Recommendation: Given the prominence of Torah Umesorah nationally in the day school movement and yet their being religiously to the right of Centrist Orthodoxy, this organization poses a special case for the Commission. Two options are possible. (1) To attempt to establish direct contact with the director to communicate the role of the Commission. (2) To limit contact to written communication.

#### IV. Academic Institutions

1. Association of Institutions of Higher Learning for Jewish Education.

Chairperson: Dr. Alvin Mars

Recommendation: Given possible centrality of these institutions for training personnel in Jewish education, we need to be in contact. (1) Contact Alvin Mars to set up best format for meeting between Commission representative and members of the organization. (2) Follow-up initial meeting with written communication with each director of the member institutions.

*DA and  
Sue*

2. Association for Jewish Studies

President: Professor Robert Chazan

Recommendation: As this group's mission - teaching Judaica and training scholars in Judaica - is less central to Commission's work, contact is a lesser priority. (1) Contact Robert Chazan to see which forms of written communication would be most appropriate for which of the membership.

*and  
primary*

#### V. Non-denominational informal education

*important*

1. B'nai B'rith (Hillel) Foundation
2. Hadassah Youth Commission
3. B'nai B'rith Youth Organization (BBYO)
4. American Zionist Youth Foundation (AZYF)
5. Association of Jewish Sponsored Camps →

Recommendation: As these organizations are not as yet seen as central to Commission's work, contact be held on a lower level of priority. (1) In consultation with JWB, contact directors of organizations to see what forms of written communication would be appropriate for which of their professional and lay leadership. (2) Follow-up meetings between Commission and organizational representatives could be set up if mutual need were to arise.

JWB



Sidney

Educator  
Consultant

Institutional

Regional

Locally-based

Interconnections on local  
level

National Diffusion Level

Sarah Lee —

intervention in one point  
in system insufficient



# MEETING AGENDA

Title A.J.N. Jan Woollen Date Scheduled 29/3/89 Time 7<sup>15</sup> AM  
 Purpose S.F.  
 Results Desired bring Jan on Board; discuss the ii; the role of Jema  
 Location Towards tomorrow's meeting - The Mayflower

SCHEDULED			ACTUAL			MEETING COST	
Start	Stop	Total Hrs.	Start	Stop	Total Hrs.		
						Value Per Hr.	Total
Persons Attending							
1	J.W. : Expresses his understanding of the ii and his support						
2	[his description makes it less proactive more planning/evaluation oriented - but essentially						
3	correct direction]						
4	S.F. : comments, 1. What about denominations.						
5	2. The ii & the major central organizations. Not to be an						
6	more organization-competitive. But rather catalyst.						
7	The role of money.						
8	J.W. : comments 1. Bring together forum of Jema staff + key emails						
9	from JUB, CJP.						
10	beginning - why the ii should NOT go directly to community						
Items To Be Discussed						(Sequence)→	
1	S.F. No short-circuiting intent. Impossible. But here are the alternatives						
2	1. Do we (ii + Jema, JUB, CJP) go together into community						
3	a let you go on alone?						
4	2. The ii must NEVER deliver services. (whether running						
5	day-school or doing what JESNA is doing).						
6	J.W. - How do we position this in the institutional						
7	network - so as to make this possible.						
8	- Possible models: Bottom-up: St Louis has an idea x						
9	Top-down: The ii has - through						
10	deliberative process decided on p. idea y. etc -						
Material Needed (Number each item)						Person Responsible	
1	S.F. - connecting the vision. The ii not to fund					Pat Graham	
	ideas but to select strategy for comprehensive					re Nat. inst. g Ed.	
	addressing & personnel/community. Via city.						
	Don't preclude line of funding good						
	projects.						
	But we are only interested in the						
	comprehensive idea. For personnel						
	I don't know how else to address personnel						
	J.W. : asks for forum / third - party etc -					Sure that	
	time is ripe in cities etc -						

The importance of funding.

Major discussion (very positive) on the nature of II's use and organization, its links to other organizations, its roles and functions

going into job meet. In says "listen, I might apply for the job of the director".





MEETING MARCH 28, 1989 AT MAYFLOWER HOTEL

ARTHUR NAPARSTEK, SEYMOUR FOX, ANNETTE HOCHSTEIN

New York

Art presented his response to the paper of March 25th on the ii. He raised a few questions:

1. The relationship between the ii and central organizations such as JESNA and JWB, or CJF could be problematic. They could see the ii as taking over some of their functions. That should probably not be the case.

2. The key to success resides among other in the leveraging power of money. The ii will only be able to bring about implementation if it has a pool of funds from which to activate leverage.

Art related his conversation with Swirdoff -- previously a vice-president at the Ford Foundation, but mainly a central figure in the movement for community development (in particular the MDRC-- Manpower Development RC and LISC) throughout the country. Art suggested that we meet with Swirdoff and the people he suggested: Dick Nathan from Princeton (formerly OMB), Eli Ginsburg, Bill Gunther, Peter Szanton -- at the Rand Corporation, Joel Fleischman at Duke University, and Bill Bresnoff, today Deputy Mayor of New York -- both in the view of Swirdoff possible directors for the ii.

A very useful conversation ensued on the various functions, roles and relationships of the ii. In particular, the relationship between the ii and local mechanisms for implementation -- clarifying the fact that the ii is not an implementor, but rather a facilitator, force-manager, of implementation.

The flip-side of this concern, is the concern with macro issues and primarily the concern raised by S.F. that if the ii is so involved with local developments -- what could happen to macro issues, such as the development of the profession? In fact, in our current design, there seems to be no strong enough locus for this kind of very much needed development.

In sum, the discussion revolved around 2 major issues: the place and role assigned to central organizations, such as JESNA and JWB and CJF, with particular emphasis on MLM's point of view expressed today in his meeting with SF -- that the ii should see as its major, or a major assignment, to build those central organizations. The people present did agree with seeing this as a major thrust of the effort. They all agree that a by-product of the ii might be the rebuilding of these organizations. (but etc, etc...)

47M



The second topic is that of those issues that can only be dealt with in a centralized fashion, and that are at great risk of being lost in the individual demonstration centers. It was agreed that these issues, e.g. building the profession, will have to be given conscious direction and effort in some structured form by the ii.

AJN prepared a preliminary job description following his reading of our paper. This is to be discussed and reviewed. We seem to agree now on the scope of the job and the need to take a very strong individual to be at its head.



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March 29, 1989

DRAFT - FOR DISCUSSION ONLY -- NOT FOR QUOTATION

## A Mechanism for Initiatives in Jewish Education

S. Fox & A. Hochstein

### I. BACKGROUND

Between August and December 1988, the Commission on Jewish Education in North America engaged in a decision-making process aimed at identifying those areas where intervention could significantly affect the impact of Jewish education in North America.

A wide variety of possible options were considered. The Commission opted for focusing its work initially on two topics:

1. Dealing with the shortage of qualified personnel for Jewish education; and
2. Dealing with the community -- its structures, leadership and funding, as keys to across-the-board improvements in Jewish education.

At the same time, many commissioners urged that work also be undertaken in various programmatic areas (e.g. early childhood, informal education, programs for college students, day schools, supplementary schools)..

### II. THE CHALLENGE

The wide consensus among commissioners on the importance of dealing with personnel and the community did not alleviate the concern expressed by some as to whether ways can be found to significantly improve the situation in these two areas. Indeed, a number of commissioners suggested that agreement that these areas were in need of improvement has existed for a long time among educators and community leaders. Ideas have been suggested; articles have been written; conferences have been held; some programs have been tried. Yet significant improvement has not come about. Some claim that we seem to know what the problems are, but have not yet devised a workable strategy for addressing them effectively in the field.

DRAFT - FOR DISCUSSION ONLY -- NOT FOR QUOTATION

The challenge now facing the Commission is to develop creative, effective and feasible approaches for dealing with the topics at hand (personnel, the community - and later programmatic options) and to launch the process that will bring across-the-board improvement and change.

### III. SOME UNDERLYING ASSUMPTION

1. To respond to the above challenge it is necessary to demonstrate that the personnel and community options can indeed be acted upon in the comprehensive manner that they were formulated. For personnel this involves recruitment, training, retention and profession-building. For the community this involves recruiting outstanding leadership, changing the climate and generating significant additional funding.

2. It is difficult to meet this challenge on the national level because it is too complex and too vast.

3. On the other hand there is good cause to believe that it could be undertaken on the local level, for the following reasons:

a. much of education takes place only on the local level

b. the scope of a local undertaking that would be comprehensive could be manageable. There is sufficient energy and there are enough people to undertake such a project.

c. The results of a local undertaking would be tangible and visible and could generate interest and reactions that might lead to a national debate on the important issues of Jewish education.

d. a local project could be managed in a hands-on manner. Therefore it could be constantly improved and fine-tuned.

e. there are ideas and programs (best practice) that if brought together, integrated and implemented in one site could have significantly greater impact than they have today when implementation is fragmented. The whole is greater than the sum of its parts.

f. visions of Jewish education could be translated and experimented with in a limited and manageable way.

g. national institutions and organizations could be mobilized for such experimental programs. They would view this as an

DRAFT - FOR DISCUSSION ONLY -- NOT FOR QUOTATION

opportunity to test and develop new conceptions for Jewish education.

h. people could be recruited and mobilized for tangible local demonstrations. The pool could be expanded to include - in addition to the current cadre of outstanding educators :

1. Rabbis
2. Scholars of Judaica (Twersky, etc)
3. Federation executives
4. Jewish scholars in the humanities and sciences (Scheffler, Schon, Lipsett, Ginzburg, etc...)

4. Local sites could be networked for greater impact.

5. Working on the local scene could take advantage of working both from the "bottom-up" and from the "top-down".

#### IV. BRINGING ABOUT CHANGE

##### A. From Options to Community Action Sites

The theoretical basis for undertaking the personnel and community options has been debated by commissioners, staff and outside experts. Though the deliberation will continue throughout, the Commission decided the time has come to deal with the translation of these options into programs and projects.

A number of assumptions have guided our work as we have begun to consider implementation:

1. The community and personnel options are interrelated and a joint strategy involving both must be devised. Indeed, dedicated and qualified personnel is likely to affect the attitude of community leaders towards education. Similarly, if the community ranks education high on its list of priorities, more outstanding personnel is likely to be attracted to the field.

2. Dealing effectively with the personnel issue will probably require a comprehensive approach: recruitment, training, profession-building and retention will all have to be dealt with simultaneously.

3. In addition to the complex package of initiatives and interventions required by (1) and (2) above, the issue of the time necessary to introduce change will have to be addressed. This will require deciding on an appropriate balance between



short, medium and long-term results.  
DRAFT - FOR DISCUSSION ONLY -- NOT FOR QUOTATION

4. All key stakeholders will need to be appropriately involved from the very beginning of this process. This includes commissioners, national organizations and institutions, local organizations and institutions, professionals (local and national), and funding sources.

5. Significant questions concerning innovation and implementation of the two enabling options - and of the programmatic options when they will be addressed - can only be resolved in real-life situations, through the dynamics of thinking for implementation, and in the actual act of implementing.



6. For all these reasons, we suggest that the Commission work with communities that wish to become Community Action Sites where we can deal with the community and personnel options.

7. By Community Action Site we mean a site (a community, a network of institutions, one major institution, etc.) where some of the best ideas and programs in Jewish education would be initiated in as comprehensive a form as possible. It would be a site where the ideas and programs that have succeeded, as well as new ideas and experimental programs, would be undertaken. Work at this site will be guided by a vision of what Jewish education at its best can be.

9. The assumption implicit in the suggestion of a Community Action Site is that other communities would be able to see what a successful approach to the community and personnel options could be like, and would be inspired to apply the lessons learned to their programs, in their own communities.

#### B. From Community Action Sites to a Mechanism for Initiatives in Jewish Education.

1. As Community Action Sites were being considered, a number of questions and issues related to their implementation arose:

2. Implicit in the notions of change, innovation, new initiatives, demonstration, is the assumption that one knows what should and can be changed and demonstrated. However, at this time some of what should and can be changed, innovated, demonstrated in Jewish education needs to be developed or created.

3. Programs for implementation are seldom successful when they are "top-down" programs. Communities must play a major role in the initiation of the idea, they must be full partners in the design of programs and in their implementation.

4. Numerous questions need to be addressed in considering the Community Action Sites approach: Who will undertake the strategic thinking? Who will plan and ensure that the standards and goals of the Commission are maintained? Who will actively accompany the ideas through their stages of development and implementation? Who will deal with the unresolved issues as they arise in implementation? Who will see that things work, and that they can be replicated? Who will consider issues of change and replication of change throughout the universe of Jewish education?

5. A strong case exists for initiating change through Community Action Sites. However, as the above issues were being considered by the staff -- in extensive consultation with experts -- it became clear that a means, a mechanism, is needed to deal with Community Action Sites. A way to mediate between ideas and implementation needs to be devised.

6. The possible role of this mechanism can be illustrated by way of an analogy borrowed from industry: the mechanism will be analogous to the unit that designs, develops and builds the prototype of a new product, improving upon it until that product works. When problems and issues arise during the process of constructing the prototype, they are dealt with and resolved in the unit. Lessons learned from implementation are absorbed and used to change, adapt and modify the product; the product is adapted to specific local needs, etc.

7. It is therefore suggested that a mechanism for implementation be created to be called (for lack of a better name at this time) the mechanism for "Initiatives in Jewish Education" (IJE).

#### IV. THE MECHANISM FOR INITIATIVES IN JEWISH EDUCATION (IJE)

##### A. The Mission

1. The IJE will be a free-standing mechanism for the initiation and promotion of change and innovation in Jewish education. As such, it should be a center guided by vision, together with rigorous work and creative thinking. If successful, it will be a source of ideas, characterized by an atmosphere of ferment, search and creativity. It will be the driving force for systemic change.

2. The IJE will design and revise development strategies - generally in concert with other persons and institutions. It will be a full-time catalyst for development efforts for Jewish education.

3. The IJE will undertake the assignment of creating Community Action Sites. These Community Action Sites will deal minimally with the two enabling options - where personnel will include: recruitment, training, profession building and retention, and community will include: bringing strong leadership into Jewish education, changing the climate and generating additional funding for education. Through personnel and the community, it will also be dealing with programmatic



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options, e.g. as it recruits and trains personnel for early childhood programs, for the day schools, for informal programs, etc.

4. The goal of the Community Action Site is to bring about major change in the quality of Jewish education in that Site, through a successful approach to the options of personnel and the community. The importance of a site resides both in the possibility to effect and demonstrate change there, and in being the basis for inspiring change elsewhere.

5. The Community Action Site will be a joint endeavour of an interested local community and the IJE. The IJE will assist, if needed, in setting up the local mechanism (local IJE) that will undertake responsibility for the Community Action Site. Each Site will have its local mechanism. Together, the local mechanisms will network for the promotion of change and the diffusion of innovation. The IJE will act as facilitator to create a network of such local mechanisms.

6. Conditions are bound to change as a result of the work of the IJE. As work proceeds, existing institutions may want to respond to emerging needs. The IJE may cause new institutions to be established - when no viable alternative exists.

7. In addition to this initial focus on Community Action Sites, the IJE will assist funders, as appropriate, in moving ahead with programmatic options in which they have an interest by acting as a consultant and professional resource. The IJE will be a central address for funding sources and for institutions who wish to work cooperatively with the IJE in their own development efforts. It may also help local IJE's find funding for their initiatives.

8. Much of the definition of the IJE will evolve during the actual process of implementation.

**B. The IJE At Work**

The following is one possible scenario of the IJE at work:

**1. Staff and Governance**

a. The IJE will be a free standing mechanism. It will have a staff to perform multiple functions and will be governed by a Board of Trustees (see Appendix I).

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b. There will be a director, responsible for all of the work of the IJE. He/she will be an outstanding, high-level professional, committed to Jewish continuity, knowledgeable of the Jewish community of North America. He/she may be an educator, a manager, or both (to be determined.)

c. In addition to the director, a team of outstanding professionals will staff the IJE (size and composition to be determined).

d. Governance of the IJE will be in the hands of a board composed of lay leaders, scholars and professionals, blending experience, knowledge and financial strength.

e. The authority of the IJE will derive from the ideas that guide it and the prestige, status and effectiveness of its Board and staff.

## 2. Functions

a. In order to meet the complex tasks involved, the IJE will undertake various functions. They will be linked organically and will complement each other. They may include:

- i. research, data collection, planning and policy analysis;
- ii. community interface (for demonstration sites);
- iii. funding facilitation;
- iv. monitoring, evaluation and feedback;
- v. diffusion of innovations.

b. The work of the IJE will be guided on an ongoing basis by the vision, the educational content and the philosophy contained in the final report of the Commission. To insure the above ongoing inputs will be received from the staff of the IJE, consultants throughout the world, institutions, scholars and community leaders. A Professional Advisory Board will be established to stimulate this activity.

c. Some of the content and rationale for items i-v above include:

i. research, data collection, planning and policy analysis

\* This may be viewed as the research and planning arm of the IJE. It will improve and maximize the knowledge-base upon which decisions for Jewish education are made. The work may be commissioned, done in-house or others may be encouraged to do various parts. The necessary data bases will be created here; major issues will be studied, key questions will be researched

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(e.g. create inventories of Jewish educational resources; undertake needs analyses; set norms and standards for training; assess the quality of existing training; analyze community structures in relationship to Jewish education, etc.).

\* To provide the analysis needed for informed decisions. (E.g. What are relevant criteria for the selection of Community Action Sites? What is the nature of the problem/s in that site? What are the political and institutional givens relevant to change in the Community Action Site? Who are the stakeholders and how can they be involved? What are the financial and financing possibilities?)

\* To provide the knowledge and planning support needed and wanted by the Community Action Sites; to work with the local IJE in the Community Action Sites and provide expertise that may be needed; to help ensure the level and quality of the work intended.

\* To be the arm of the IJE for planning and strategic thinking. It is here that development plans will be designed and strategies will be defined and revised on an ongoing basis. This work will extensively involve other persons and institutions.

ii. community interface (for Community Action Sites)

\* The IJE will work extensively with the communities where Community Action Sites are located. It will do so by means of local mechanisms that will be established.

The community interface function may deal with:

\* Initiation of negotiations with relevant stakeholders and community leaders about undertaking the process of becoming Community Action Sites.

\* Help the local community establish a mechanism for its Community Action Sites and assist in recruiting staff for such mechanisms.

\* Ongoing facilitation during implementation - as needed (e.g. assistance in negotiations with national training institutions, universities, organizations, etc.). The IJE staff will be proactive in its support of the local management of the Community Action Sites. Relevant IJE staff will maintain ongoing contact with the local team.

iii. funding facilitation

This function may include the following:

\* To undertake as appropriate, brokering between various possible sources of funding (foundations, national organizations,



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local sources of funds, federations, individuals) and the Community Action Sites.

- \* To be a central address both for funding sources and for relevant institutions who will seek guidance in accomplishing their objectives.

- \* To seek to link high priority pieces of work with various funders and competent implementors.

- \* To assist funders in moving ahead with programmatic options in which they have an interest, acting as a consultant, and providing professional assistance as appropriate.

#### iv. monitoring, evaluation and feedback

The purpose of this function is threefold:

- \* To monitor activity of each Community Action Site.

- \* To evaluate - in whatever form or forms deemed most relevant - the progress of Community Action Sites.

- \* To create and activate feedback loops to connect practical results with a process of re-thinking, re-planning and implementation.

#### v. diffusion of innovation

The goal of the Commission on Jewish Education in North America is to bring about across-the-board systemic change in Jewish education, by initially dealing with the areas of personnel and the community. The IJE will deal with the complex issue of the diffusion of innovation from one or more Community Action Sites to many or all communities. Strategies will be devised to maximize change throughout the community.

### 3. Organization of Functions

In order for each of the above five functions to be given the attention needed, and that none be overwhelmed or overtaken by pressing needs of other functions, they should probably be structured as distinct units. The staff of any one may be as small as a part-time person or as large as a full team - as needed - however each function should have autonomous importance and authority.

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4. How will the IJE begin its work?

- a. Once the notion of an IJE is adopted by the Commission, a comprehensive plan will be developed to launch the IJE. At the appropriate time a Board will be constituted and a director will be hired.

