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MEMORANDUM

July 113, 11993

To: CIME Board

From: Dr. Barry W. Holtz

Re: Update -- The Best Practices Project

The Best Practices Project has many long-range implications. Documenting "the success stories of Jewish education" is something that has never been done in a systematic way and it is a project that cannot be completed within a short range of time. This memo outlines the way that the Best Practices Project should unfold over the next 1 to 2 years.

Documentation and Work in the Field

The easiest way to think about the Best Practices Project--and probably the most useful--is to see it as one large project which seeks to examine eight or nine areas (what we have called "divisions"). The project involves two phases of work. First is the documentation stage. Here examples of best practice are located and reports are written. The second phase consists of "work in the field," the attempt to use these examples of best practice as models of change in the three Lead Communities.

The two phases of the Best Practices Project are only partially sequential. Although it is necessary to have the work of documentation available in order to move toward implementation in the communities, we have also pointed out previously that our long-range goal has always been to see continuing expansion of the documentation in successive "iterations." Thus, the fact that we have published our first best practice publication (on Supplementary Schools) does not mean that we are done with work in that area. We hope in the future to expand upon and enrich that work with more analysis and greater detail.

In the short run, however, we are looking at the plan below as a means of putting out a best practices publication, similar to what we've done for the Supplementary School division, in each of the other areas. What we have learned so far in the project is the process involved in getting to that point. Thus it appears to be necessary to go through the following stages in each of the divisions.

The Steps in Documentation: First Iteration

Preliminary explorations:	To determine with whom I should be meeting
Stage one:	Meeting (or multiple meetings) with experts
Stage two:	Refining of that meeting, leading to a guide for writing up the reports
Stage three:	Visiting the possible best practices sites by report writers
Stage four:	Writing up reports by expert report writers
Stage five:	Editing those reports
Stage six:	Printing the edited version
Stage seven:	Distributing the edited version

Next Steps

For this memo, I've taken each "division" and each stage and tried to analyze where we currently are headed:

- 1) *Supplementary schools*: Mostly done in "iteration #1". There may be two more reports coming in which were originally promised.
- 2) *Early childhood programs*: Here we are at stage six. The volume is in print.
- 3) *JCCs*: Here we are at stage three. This will require visits, report writing, etc. The JCCA is our partner in implementing the documentation.
- 4) *Day schools*: Here we are at stage one, two or three, depending on the religious denomination. Because this involves all the denominations, plus the unaffiliated schools, this will be the most complicated of the projects for the year.
- 5) *College campus programming*: Here we are at stage three, with the national Hillel organization as a partner. One question to deal with is non-Hillel campus activities and how to move forward with that. As to Hillel programs, we need to choose report writers, visit sites, etc.
- 6) *Camping/youth programs*: Here we are at the preliminary stage. We should be able to have a stage one meeting this year. It's probably fairly easy to identify the right participants via the denominations and the JCCA.
- 7) *Adult education*: Here we are at the preliminary stage. We should be able to have a stage one meeting this year. Here gathering the right participants is probably more complex.

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- 8) *The Israel experience:* We hope to move this project forward with consultation from the staff of the CRB Foundation. As they are moving forward with their own initiative, we hope to be able to work jointly on the “best practice issues” involved with the successful trip to Israel.
- 9) *Community-wide initiatives:* Finally, I have recommended that we add a ninth area—Community-wide initiatives using JESNA’s help. This refers to Jewish education improvement projects at the Federation or BJE level, particularly in the personnel or lay development area. Examples: The Providence BJE program for teacher accreditation; the Cleveland Fellows; projects with lay boards of synagogue schools run by a BJE; salary/benefits enhancement projects. This project would use JESNA’s assistance and could probably be launched rather quickly.

Lead Communities: Implementation—and How to Do It

In previous reports I have quoted Seymour Fox’s statement that the Best Practice Project is creating the “curriculum” for change in the Lead Communities. This applies in particular to the “enabling options” of building community support for Jewish education and improving the quantity and quality of professional educators. It is obvious from the best practice reports that these two elements will appear and reappear in each of the divisions under study.

The challenge is to develop the method by which the Lead Community planners and educators can learn from the best practices that we have documented and begin to introduce adaptations of those ideas into their own communities. This can occur through a wide range of activities, including: presentations to the local Lead Communities’ commissions about the results of the Best Practices Project, site visits by Lead Community lay leaders and planners to observe best practices in action; visits by best practices practitioners to the Lead Communities; workshops with educators in the Lead Communities, etc. The Best Practices Project will be involved in developing this process of implementation in consultation with the Lead Communities and with other members of the CIJE staff. We have already discussed possible modes of dissemination of information in our conversations with the three communities.

How Can We Spread the Word?

The first report on supplementary schools has engendered a good deal of interest in the larger Jewish educational community. One issue that the CUE needs to address is the best way to make the results of the Best Practices Project available. How should the dissemination of materials take place? How should the findings of this project have an

impact on communities outside of the Lead Communities? Certainly we should find ways to distribute the materials as they are produced. Perhaps we should also begin to consider a series of meetings or conferences open to other communities or interested parties, as the project moves forward.

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CJIE Project on Monitoring, Evaluation, and Feedback in Lead Communities Progress Report — August 1993

Dr. Adam Gamoran and Dr. Ellen Goldring

How will we know whether the Lead Communities have succeeded in creating better structures and processes for Jewish education?

On what basis will CJIE encourage other cities to emulate the programs developed in Lead Communities? Like any innovation, the Lead Communities Project requires a monitoring, evaluation, and feedback (MEF) component to document its efforts and gauge its success.

By monitoring we mean observing and documenting the planning and implementation of changes. Evaluation entails interpreting information in a way that strengthens and assists each community's efforts to improve Jewish education. Feedback consists of oral and written responses to community members and to the CJIE.

This progress report describes the activities in which the project has been engaged during 1992-93 and the products it has yielded. The main activities include: (1) Ongoing monitoring and documenting of community planning and institution-building; (2) Development of data-collection instruments; (3) Preparation of reports for CJIE and for community members.

I. *Ongoing Monitoring and Feedback*

To carry out on-site monitoring, we hired three full-time field researchers, one for each community. The field researchers' mandate for 1992-93 centered on three questions:

- (1) What is the nature and extent of mobilization of human and financial resources to carry out the reform of Jewish education in the Lead Communities?
- (2) What characterizes the professional lives of educators in the Lead Communities?
- (3) What are the visions for improving Jewish education in the communities?

The first two questions address the "building blocks" of mobilization and personnel, described in *A Time to Act* as the essential elements for Lead Communities. The third

question raises the issue of goals, to elicit community thinking and to stimulate dialogue about this crucial facet of the reform process.

Monitoring activities involved observations at virtually all project-related meetings within the Lead Communities; analysis of past and current documents related to the structure of Jewish education in the communities; and, especially, numerous interviews with federation professionals, lay leaders, rabbis, and educators in the communities.

Each field researcher worked to establish a “feedback loop” within her own community, whereby pertinent information gathered through observations and interviews could be presented and interpreted for the central actors in the local lead community process. We are providing feedback at regular intervals (generally monthly) and in both oral and written forms, as appropriate to the occasion. An important part of our mission is to try to help community members to view their activities in light of CIJE’s design for Lead Communities. For example, we ask questions and provide feedback about the place of personnel development in new and ongoing programs.

We are also providing monthly updates to CIJE, in which we offer fresh perspectives on the process of change in Lead Communities, and on the evolving relationship between CIJE and the communities. For instance, in July 1993 we presented views from the communities on key concepts for CIJE implementation, such as Lead Community Projects, Best Practices, and community mobilization. This feedback helps CIJE staff prepare to address community needs.

II. Instrumentation

A. Interview Protocols

The MEF team developed a series of interview protocols for use with diverse participants in the communities. These were field tested and then used beginning in late fall, 1992, and over the course of the year. The interview schema for educators were further refined and used more extensively in spring, 1993.

B. Survey of Educators

We also played a central role in developing an instrument for a survey of educators in Lead Communities. The MEF team worked with members of Lead Communities, and drew on past surveys of Jewish educators used elsewhere. The survey was conducted in Milwaukee in May and June, 1993, and it is scheduled to be implemented in Atlanta and Baltimore in the fall of 1993.

The purpose of the educator survey is to establish baseline information about the characteristics of Jewish educators in each community. The results of the survey will be used for planning in such areas as in-service training needs and recruitment priorities. The survey will be administered (was administered in Milwaukee's case with a response rate of 86%) to all teachers in the Lead Communities. Topics covered in the survey include a profile of past work experience in Jewish and general education, future career plans, perceptions of Jewish education as a career, support and guidance provided to teachers, assessment of staff development opportunities, areas of need for staff development, benefits provided, and so on.

III. *Reports*

A. Reports on the Professional Lives of Jewish Educators

Each community is to receive three types of reports on educators: A qualitative component, describing the interview results; a quantitative component, presenting the survey results; and an integrative component, which draws on both the qualitative and quantitative results to focus on policy issues. The schedule for delivering these products is dictated by the specific agendas of each community.

The qualitative reports elaborate on elements of personnel described in *A Time to Act*, such as recruitment, training, rewards, career tracks, and empowerment. Examples of key findings in reports written so far are the extent of multiple roles played by Jewish educators (e.g., principal and teacher; teacher in two or three different schools), and the tensions inherent in these arrangements; the importance of fortuitous entry into the field of Jewish education, as opposed to pre-planned entry, and the challenges this brings to in-service training; and the diversity of resources available to professional development of Jewish educators, along with the haphazard way these resources are utilized in many institutions.

B. Reports on Mobilization and Visions

Information about mobilization and visions has been provided and interpreted for both CJE staff and members of Lead Communities at regular intervals. In September, we are scheduled to provide a cumulative Year-I report for each community which will pull together the feedback which was disseminated over the course of the year. These reports will also describe the changes and developments we observed as we monitored the communities over time.

IV. *Plans for 1993-94*

A. Ongoing Monitoring and Feedback

A central goal for 1993-94 will be the continued monitoring and documenting of changes that occur in the areas of educational personnel, mobilization, and visions. In addition, we are proposing to play a larger role than we initially anticipated in the community self-studies, just as we did with the educators survey. (The educators survey is in fact the first element of the self-study, as described in the Planning Guide.)

In the spring, our field researcher for Atlanta notified us that she would be resigning her position, effective July 31. Although we regret her resignation, we are trying to use it to our advantage by hiring a replacement whose skills fit with the evolving responsibilities of the MEF project. The new field researcher in Atlanta will have expertise in survey research, and will play a lead role in working with the communities to carry out the self-studies.

B. Outcomes Assessment

Although specific goals for education in lead communities have yet to be defined, it is essential to make the best possible effort to collect preliminary quantitative data to use as a baseline upon which to build. We are proposing to introduce the diagnostic Hebrew assessment for day schools, created by Professor Elana Shohamy of the Melton Centre in Jerusalem, as a first step towards longitudinal outcomes analysis. The great advantage of the Shohamy method is its value as a diagnostic tool, encouraging schools to use the results of the assessment to guide their own school improvement efforts. The tests have common anchor items, but are mostly designed especially for use in each school.

C. Encouraging Reflective Communities

The MEF project will be successful if each Lead Community comes to view evaluation as an essential component of all educational programs. We hope to foster this attitude by counseling reflective practitioners — educators who are willing to think systematically about their work, and share insights with others — and by helping to establish evaluation components in all new Lead Community initiatives.

Jerusalem Center

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A SPECIAL REPORT

THE JEWISH AGENCY: HISTORIC ROLE AND CURRENT CRISIS

Daniel J. Elazar

AMERICAN JEWISH

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Democratizing the Establishment

Some twenty years ago when the Jewish Agency was reconstituted, I predicted that the great contributions that the reconstituted Agency would make would be to establish an arena for the conduct of world Jewish public affairs. No longer would it be necessary to conduct the affairs of Israel-diaspora relations by having a few Jewish leaders from the United States meet in a room with a few people at the behest of the government of the State of Israel. It would be possible to broaden that circle to include the rest of the Jewish world as well as the State of Israel in an arena in which the public affairs of the Jewish people could be conducted.

Twenty years later it is clear how amply this prediction has been fulfilled. The Board of Gov-

ernment of the Jewish Agency for Israel (JAFI) today represents a major share of the leadership of the Jewish world. People have moved into positions of leadership in world Jewry from their communities and from their parties in Israel in 3 ways: if it was inevitable earlier because there was no mechanism

To Rebuild the Jewish National Home

The Jewish Agency was originally designed not as an arena for the conduct of world Jewish public affairs, but for the singular purpose of rebuilding the Jewish national home in the Land of Israel. As such, the Jewish Agency is as unique an organization as the Jewish people is a unique people, and it has no parallel in the world. The Jewish Agency exists by virtue of

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an international charter established in 1922 by the old League of Nations as part of its mandate to the British to legally take control of the powers of government in the land they had conquered in World War I and to work towards "the advancement of a Jewish national home in Palestine," as they put it.

The Jewish Agency may be the only such organization in the world that has a special charter under international law, one that was readopted by the United Nations as part of a general re-adoption of the surviving elements of the League of Nations that were deemed worthy of continuing after World War II. The Agency survived the catastrophic inability of the League of Nations to fulfill its world mission because it became the instrumentality of the Zionist movement and the Jewish people as a whole. While we cannot point to an easy and simple definition of what the Agency is, it is easier to define what the Agency is to do, which is to be a Jewish agency (with a small "a") that would be responsible for rebuilding the Jewish national home.

Joining Zionists and Diaspora Jewish Philanthropists

The World Zionist Organization (WZO) could have been that agency alone. The mandate that chartered the Agency did not prescribe that there should be something other than the WZO and it was left to the WZO and its president at that time, Chaim Weizmann, to determine in 1922 just what a Jewish agency would be. Weizmann immediately recognized that to be a proper Jewish Agency it would have to be more than the WZO alone, that the WZO should lead, but that all of the leadership of world Jewry should be mobilized behind the effort.

For seven years he worked hard to persuade those who were then truly non-Zionists, leaders who were concerned about the fate of their people, especially in the upheavals of World War I and the postwar period, and especially in Eastern Europe where those upheavals took the worst forms of communism, xenophobic nationalism, antisemitism and the like. He worked to find a way in which these non-Zionist philanthropists, people then caught in tight antisemitism, could work together with the World Zionist Organization to establish a proper Jewish Agency.

At that time, one of the major problems that separated the two groups was that the non-Zionists still believed that emancipation was enough for Jews, that

what had happened from the eighteenth century onward in the granting of civil rights to Jews wherever they were living was sufficient, and that this should be the goal of the Jewish effort. They believed that the task of Jewish leadership was to secure those rights in the countries of Eastern Europe and the Arab world which had lagged behind France and the United States and the other countries of the West in granting or affirming such civil rights.

The Zionists believed that this was not enough. For the Jewish people to be truly secure and to continue to exist in a creative cultural and political way, the Jews needed to return to their land, there to rebuild their national home. In those days the discussion of the need to establish a politically sovereign state was kept somewhat under wraps; the idea of a Jewish national home was the essence of the Zionist message. In most of the communities in question, the Zionist movement was even locked in combat with some of those same philanthropic leaders, good Jews all, but Jews with a different mission.

Weizmann persisted and his persistence was capped with momentary success in 1929 when the Jewish Agency was established, when the Zionists and the philanthropists met in Switzerland to establish a Jewish Agency that was a partnership, that brought together both sides of the Jewish world at that time. Unfortunately, it did not succeed for a number of reasons, not the least of which were the technical difficulties of travel that were not superseded until the advent of the jet plane at the end of the 1950s. There were other reasons as well, partly having to do with the great difference between Zionist and non-Zionist ideology, and partly due to the critical role played by the self-appointed diaspora leadership. Louis Marshall, the great leader of the philanthropists from the United States who became the spokesman for the non-Zionist partners around the world, died on his way back from the founding meeting. As a result of all this, that first effort did not succeed, despite Weizmann's vision.

Nevertheless, it lingered on for a decade in limited ways. The non-Zionists had to be formally represented in the activities of the Agency, whose offices were established in Jerusalem. One man was sent to speak for the non-Zionist diaspora during the period from 1929 to 1936. What was sad was that the effort was indeed made but it could not be made

wholeheartedly. Between 1936 and 1946, the partnership remained in existence on paper only, and finally in 1946 the WZO took over full responsibility for the Jewish Agency.

Taking over full responsibility may have been a necessary response for the times, but it was not a sufficient response for the needs of the Jewish people. The philanthropists of the postwar years were mobilized by 1946 for the critical fight for Jewish statehood. David Ben-Gurion, who was Chairman of the Jewish Agency Executive at that time, made a decision to turn to the non-Zionist philanthropists rather than the diaspora Zionist leadership for the wherewithal to undertake the task involved. In the United States especially, they had become the community leaders in every respect except perhaps in leading the fight at the United Nations for a Jewish state.

The year 1946 began a period in which there was no formal common institutional mechanism through which the two groups could work together. Instead, they had to relate through their respective institutions. The Jewish Agency and the WZO were on one side, and the fundraising institutions, particularly the United Israel Appeal (Keren Hayesod was really part of the Zionist world in those days, much more tightly so than it is now), on the other, trying to satisfy all parties that the available resources were being mobilized properly and that expenditures were being monitored in a way that would make the donors confident that their funds were being used in the best possible way.

This, in time, led in the late 1960s to the reconstitution of the Jewish Agency after it became apparent that there had to be a single institutional framework to bring together both elements of what had become a historic partnership.

Nation-Building vs. World Jewish Relief

The foundations of the division between Zionists and non-Zionists in those early years were rooted in two basically differing conceptions of what the tasks of world Jewish leadership should be. There were those, primarily the Zionists, who argued for nation-building as the principal task of the true leadership of world Jewry, and, indeed, argued that only those leaders who were involved in the task of nation-building were entitled to lead the Jewish people.

On the other side, there were the philanthropists

who argued that, first and foremost, it was necessary to make certain that support was available to relieve Jews in distress. After World War II, these two views came together operationally around state-building, when it became apparent after the Holocaust that philanthropy and civil rights in their lands of origin were not a solution to the distress of the Jewish refugee, that only the reestablishment of a Jewish national home that was also a state would be sufficient. So, through a state-building that saved Jews in distress, the two positions came to coincide and together achieved so much.

However, the conflict between the nation-building outlook and the philanthropic outlook is a historic conflict and it did not disappear. It may have been successfully submerged operationally, but it remained an ideological reality in many quarters. True, the two views were united. There were those Zionists who remained outside the new state as leaders of their diaspora communities. There were those from the once non-Zionist camp who embraced the idea of nation-building in Israel, but still the two positions were locked in a quiet but still very real conflict that found expression less in public arguments about nation-building or philanthropy and more in discussions of the proper role of the diaspora, the proper role of the Jewish Agency, what functions should be undertaken by it, how should the money be divided?

The issue of division between local needs and Israel is one that divides the nation-builders as much as it divides the philanthropists. In fact, especially in diaspora communities like the United States, there are philanthropists who say: "Our job is to support Israel at all costs," whereas the nation-builders say:

"Without a strong local community, we will not be able to continue supporting Israel." Operationally, then, state-building was only a partial reconciliation.

Nation-Building or State-Building

The nation-building school itself has two variations. There are those who see nation-building strictly as state-building, that is to say, building the Jewish nation through the strengthening of the State of Israel. They would require concentration of JAFI efforts entirely or almost entirely within Israel for purposes mainly to be determined by the government of the state. The second variant is that nation-building refers equally or almost equally to the entire Jewish nation, the State of Israel and the diaspora,

and that a major dimension of the nation-building task is fighting assimilation in the diaspora through Jewish education and the strengthening of Jewish communal institutions.

An example of this division can be found in the differing positions of those of the nation-building school who advocate that assistance to Jews in the ex-Soviet republics should be confined to helping them emigrate to Israel, and those who see that Jewish nation-building also requires establishing Jewish communities and Jewish schools in those republics for the Jews who do not choose to emigrate, if only to develop a generation who will be more prepared to consider aliya. Operationally, the state-building and philanthropic schools can converge on operational goals and see Israel as the first and foremost focus of JAFL activities, while the nation-builders can be divided in their operational goals.

The Impact of Different Environments

Furthermore, the partnership can only flourish if due consideration is given to the different environments from which the partners come. Israeli partners from any source come from an intensely political environment, one in which partisan politics is the norm in public activity, is pervasive, and is ideologically justified. Public affairs are conducted by representatives of political parties or secondarily by individuals identified with one party or another, even if they, themselves, are not politicians. This is as true of the Manufacturers' Association as of the Knesset.

By contrast, most diaspora communities see their work as civic and unpartisan, to be kept away from ideologies — religious as well as political — and parties. Diaspora Zionists follow the same pattern as their Israeli counterparts, except that their politics is very often detached from their constituencies because of the nature of the diaspora.

Representatives of the diaspora communities through the *mafiyot* (fund-raising campaigns) also have their politics, but it is more a politics of personalities, far less pervasive, and conducted with a certain ambivalence within the context of ideologies that see participation in Jewish life as a matter of civic and philanthropic service rather than pursuit of partisan success. Israelis and their Zionist counterparts are open in their pursuit of partisan political goals, while the community representatives must pursue theirs in more subtle and limited ways. Both

of these are realities that must be taken into consideration in determining the structure of the partnership.

The Six-Day War Transforms Givers into Jewish Leaders

By 1967 it became clear that a new synthesis was needed, partly because the diaspora leadership had come to see themselves in a different way. The Six-Day War was the catalyst for change, beginning with a new self-perception on the part of the philanthropists. A personal experience illustrates the point. I was then living in Philadelphia and was involved with a group that succeeded in establishing a Philadelphia Jewish Archives Center, with support from the Federation and the local American Jewish Committee chapter. Edward Wolf II, who had been president of the Federation and came from one of the most distinguished Jewish families in Philadelphia, had for years been trying to establish an archives to hold the community records. Where he failed, we succeeded in less than a year in 1968.

Trying to understand why, it seemed that when Wolf had asked for an archives center, he was talking with leaders who perceived themselves to be philanthropists, whose work was benevolence, not of any historic interest. After the 1967 War those same leaders began to see themselves as part of the historic process of the maintenance, extension and development of Jewish life. Once they saw themselves as true leaders of the Jewish people involved in something more than simply being generous, decent human beings, they wanted their story preserved.

The changed perceptions after 1967 brought the diaspora "non-Zionist" leadership to seek direct involvement in Israel. The reconstitution of the Jewish Agency was perhaps the greatest result of those changing perceptions, certainly as far as the Israel-diaspora relationship was concerned. It came at a time when the advances in technology enabled those leaders to gather several times a year and speak to (or, more recently, fax) one another daily. These new realities have contributed much to the success of the reconstitution and the reestablishment of a world Jewish polity with a collective decision-making capacity.

Rack 2,500 years ago, Ezra and Nehemiah came back to Eretz Israel from Babylon in the fifth century BCE and established the Anshei Knesset Hagedolah (Men of the Great Assembly) as the governing body

of the Jewish people. (The present Knesset is deliberately named after the Anshei Knesset Hagedolah and has the same number of members. There were 120 members of the Anshei Knesset Hagedolah because 120 represents ten *minyanim*, or a symbolic *minyan* for each of the — by then disappeared — 12 tribes.) The Anshei Knesset Hagedolah wanted to represent the whole Jewish people, but the only way that the Jews from Babylon or Egypt could be represented is if two or three would come to live in Jerusalem for a few years. That was the situation at its best until our times.

Opting Against a World Jewish Parliament

In the years following the first establishment of the Jewish Agency, there was much talk in the Jewish world of establishing a world Jewish parliament. Instead the reality is that the Jewish people in the twentieth century have developed a network of functional authorities who take responsibility for different aspects of the work of world Jewry. The Joint Distribution Committee (JDC) has its role; ORT has its role, the World Jewish Congress has its, as do others. Among them, the Jewish Agency has moved from being a multi-purpose functional authority which has as its focal point the rebuilding of the land and state of Israel to become the nexus of this network of authorities.

This functional solution, rather than a parliamentary one, developed out of a convergence of interests starting from different premises. The early leaders of the State of Israel assumed that since Israel was a politically sovereign state, it would speak for the Jews of the world. If that proved to be impossible, it was assumed that nobody else would, and nobody could subordinate a politically sovereign state to some voluntary world Jewish parliament. So while the dictates of political sovereignty could not accept a world parliament, they would accept a multi-purpose functional authority.

The Jews of the diaspora, meanwhile, saw themselves as citizens of their respective countries who had come together in voluntary communities. They did not particularly want to sit in a body called a world Jewish parliament for fear of its triggering antisemitism and charges of dual loyalty. However, a functional authority whose purposes were broadened was an expeditious answer, and several functional authorities an even better answer.

The reconstitution of the Jewish Agency placed the Agency at the nexus of that network, at the critical juncture. On the one hand, the WZO reaches out into the network of representative bodies and religious movements in the Jewish world. On the other hand, the UIA and Keren Hayesod reach out into the community to the community fundraising and planning bodies. To put it another way, the Jewish Agency has the State of Israel on one side and the voluntary communities on the other. On yet a third side it has looser connections with the representative and religious bodies of those communities. And on a fourth side it has connections with those instrumentalities designed to promote certain functions in Jewish life, whether relief and rehabilitation or education.

Any new synthesis ought to start from the understanding that we are discussing a network of authorities. The decisions to be made involve such questions as: "How do we come to create greater integration, to expand the authority at the nexus to become more encompassing than it is, or simply to improve relationships between the various institutions? These relationships now need to be reevaluated in light of a generation's experience to see where we want to go from here.

Next Steps to Consider

The very success of the reconstitution has transformed the situation of JAFI and the world Jewish polity to the point where next steps need to be considered as we approach the twenty-first century. The tasks of JAFI partners and governing bodies, then, is not one of repairing damage but of moving forward, of building on their success in order to develop an institutional framework even better able to confront the challenges of the coming generation than what exists today. In that connection, the following issues must be considered:

1. Is the partnership broad enough to include all those who should participate in the JAFI arena?
2. Given the realities of public life, with its inevitable politics, in what ways should the politics involved in the governance of JAFI and the carrying out of its mission be structured and what accommodations have to be made between the different kinds of politics which the partners bring to the table?
3. How should the formal leadership of JAFI be chosen so as to properly operationalize the institution?

al arrangements designed to respond to the first two challenges?

A Will to Bridge Israel-Diaspora Differences

We know that we face the challenges of different environments and different styles. We are a world people, but we are a people whose components easily and excellently adapt to life in their own countries as well as easily and excellently cooperating with Jews in other countries. Our constitutional achievement has been to create an institution that provides an arena in which to confront our challenges face to face, not to ignore them and walk away from them, a forum in which to allow ourselves to get aggravated but then to bridge our aggravations.

In 1792 there was an effort to live together, but through force of circumstances both sides walked away from one another. Did they achieve more than it was possible to achieve together? Abraham Lincoln talked about the relationship between the North and the South at the time of the American Civil War, suggesting that it was preferable to have a regular marriage than to try to live together without benefit of that kind of sanction because the two sides could not separate. They had to live with each other and the real question became how to do it best. The same is true of Israel and the diaspora. Doing it best requires a constitutional framework that can create an institutional capacity to do the job.

New Directions: Israel Becoming Dominant; Europe Reenergizing

In the intervening years since the reconstitution, there have been other changes in the Jewish world, most especially the massive aliyah from the ex-Soviet Union and Ethiopia and a demographic crisis in the Western diasporas. Both of these changes are presently in progress. What will be in ten years in Israel and the diaspora and what rethinking will be needed?

One major change will be a demographically pigmented Israel that, if present trends continue, may become the largest single community in the Jewish world by the year 2000, and perhaps even become home to a majority of world Jewry twenty or thirty years after that. The Zionist dream is approaching a realization that few other than its greatest visionaries expected. This will change today's perceived balance between Israel and the diaspora. Most Jews still think of a Jewish world in which American

Jewry is three times as large as Israeli Jewry, but this is no longer true as the two communities approach numerical parity.

While a majority of Jews will still live in the diaspora in the immediate future, it will be a multi-~~ethnic~~ ^{A Hispanic} diaspora. There will remain large Jewish communities in Eastern Europe and the ex-Soviet Union, however many come to Israel. There still will be many Jews living there, many of whom will be actively interested in defining a Jewish polity for themselves in the world Jewish polity. As the European Community moves toward greater integration, its Jewish communities will form more of a bloc of 1.2 million, a not insubstantial number.

So Israel will take on new responsibility, while the diaspora will take on new complexity. Europe, east and west, will have to be integrated into the world Jewish polity in a stronger way than in the past. As a result, the English-speaking Jewish communities that act as bridges between the United States and the continental European Jewish communities, by virtue of their position within the institutional framework, will have an ever greater task to perform.

Development of Civic Life in Israel

Israel will be moving from a public life that is politically permeated to one which has a strong civic dimension. A true democracy is a stool that rests on three legs — a strong private sector where individuals can pursue their own lives as they see fit; a strong governmental sector, democratic and responsive to public opinion, and a strong civic sector where individuals come together not to force government, but to act instead of government and make democracy possible through volunteerism. Civic life — the coming together of people on a voluntary basis to undertake public tasks — is the dominant feature of Jewish communities in the diaspora, especially in the United States where civic life is so well developed in general. Civic life is beginning to emerge as a force in Israel as well and is likely to do so much more over the course of the next decade as more individuals have the resources to become involved civically and not only politically.

The need for establishing clearer lines of what it means to be Jewish, as well as better education for Jews as to how to get there, were once diaspora — principally American Jewish — tasks. Now they are

world tasks of the Jewish people, in Israel as well as other diaspora communities. In Western Europe, the efforts to create a unity that goes beyond the borders of individual countries, which have lagged so far behind the European Community, will become matters of no small importance. All these factors and others will require changes in our thinking and the Jewish Agency should be at the center of thinking of how to respond to those changes.

Confronting the Major Issues

Looking at the Jewish Agency of today, what are the outstanding issues that seem to be most pressing in the eyes of its leadership? The first has to be a kind of general friction between the leadership of the WZO and those of the communities, as a result of the aforementioned difference in conceptions and goals. Many of these frictions, which have to do with personal styles as well as most formal expectations, are inevitable in any organization that brings together people of different backgrounds and expectations. Others are a result of the particular combination in this case. These problems may be ameliorated through improved processes and commitment to these processes, but this is easier said than done.

An even more difficult problem is the essentially protective approach the Zionist panics have consistently taken in their decision-making. They have emphasized protecting what they have rather than trying to provide vision for JAFI as a whole in light of the ideological principles they espouse, which might have strengthened the WZO itself. This creates special problems in the decision making process.

This posture has, in turn, raised questions on the part of the community regarding its attitude with regard to the permanent JAFI allocation to the WZO. The feeling has grown that the Jewish communities of the world through their fundraising bodies are providing permanent support for an anachronism whose leaders use the money to oppose all of their partners' plans and proposals, thereby opening the door to repeated attacks on the very existence and legitimacy of the WZO. At the same time, the WZO leadership feels themselves to be at the mercy of the community with regard to their very existence and position as spokesmen for the nation-building perspective.

Another issue that has been raised is the procedure

for electing the Chairmen of the JAFI Executive, the Chairman of the Board of Governors, and the Treasurer. Under the present system, one side or another has principal control of the nominating process, while the other side has, at most, a veto — the "advise and consent" process. Proposals have been advanced to unify the electoral processes so that the Assembly and/or the Board of Governors jointly elect those officers.

A more critical problem is the severing of relationships between the department heads and directors-general of the JAFI departments. The success of the community leadership in securing the appointment of directors-general on a merit basis has tended to sever the connection between department heads and their directors-general who used to be subject to appointment or removal by the department head. As a result, we agree that in no department, with the possible exception of Project Renewal, which has the Chairman of the Executive as its department head, are the head and director-general cooperating easily. Is this a situation of confrontation or a cordial relationship? Needless to say, this is an unhealthy situation. Proposals suggested for us include the elimination of the department heads or to restore the political connection between each department head and his director-general.

Another issue that has been raised of late is the role of the committees of the Board of Governors. In a very useful report, the Board of Governors wisely expanded its standing committees to include members of the Assembly. Unfortunately, after working long, hard and thoroughly to reach decisions, in many cases committees have had their decisions overruled by others before their recommendations reached the Board of Governors, leaving them with a feeling of frustration and preventing the smooth functioning of what was designed to be an improvement in the governance of JAFI. The resolution of most, if not all, of these issues depends upon the composition of the board of Governors, which reflects the character of the partnership.

The Current Confrontation

In June 1991, Mendel Kaplan, Chairman of the Board of Governors, launched an effort to confront these problems and make such constitutional changes in the Agency as were necessary to respond to them.

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The UIA-KH WZD
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Mandel Institute

Tel: 972-2*617 418; 618 728

Fax: 972-2*619 951

Facsimile Transmission

To: Barbara Kline

Date: 12/1/93

From: David Kline

No. Pages: 1-3

Fax Number: _____

Dear Ginny,

These are the document we are
talking about right now - For
Hand and you to consider -
It is great to be back in synch
with you!

* Copy M.H.M.

2

THE CIJE -- PRELIMINARY WORKPLAN:

1992/1993

A. Function, structure and staffing assumptions

The following assumptions guide this plan:

a. The function of the CIJE is to do whatever necessary to bring about the implementation of the Commission's decisions. This includes initiating action, being a catalyst and a facilitator for implementation. The CIJE is not a direct provider of services.

b. The CIJE is a mechanism of the North American Jewish Community for the development of Jewish education. Optimally an increasing number of leaders would see it as their organization for purposes of educational endeavors.

c. It will always be a small organization with few staff and high standards of excellence. We assume that its staff will include, in addition to the executive director and an administrative support staff, a planner and a chief education officer, as well as possibly some addition staff with content expertise. *F. I. Typ P. O. (T. T. h Cfc A ^ V j U c ^ r*

d. The plan is based on the assumption that the assignment includes fundraising for the CIJE and for the CIJE's contribution to Lead Communities. *V. v. & p. * (S J / A ' p r , ' F - - J - -*

B. Establishing Lead Communities

The bulk of the CIJE's work for this coming year, will be the to-active efforts required to establish lead communities, to guide them and guarantee the content, the scope and the quality of implementation, and to help raise the necessary funds for the CIJE's share in their work, as well as for the Lead Communities themselves. (the CIJE's role in funding was debated at the August meetings -- I am not sure that this formulation accurately reflects the debates).

C. Elements of the workplan for Lead Communities

Immediate: Preparation, negotiations and launch

1. Prepare written guidelines for Lead Communities (LC), including proposed agreement, planning guidelines, description of the project and of the CIJE's support role.

2. Prepare CUEE staff for the assignment with LC's and have periodic staff meetings for ongoing work. Items 1 and 2 involve further preliminary development of the concept of Lead Communities, its translation into specific content and practices.

3. Offer ongoing guidance and backing to the two support projects: Best Practices and Monitoring, Evaluation, Feedback.

4. Launch the dialogues with lay and professional leadership in each LC towards an understanding of the broad lines of the project, an agreed upon process for the project and the formulation of an agreement or contract. The chronology is to be determined. In particular we discussed the question of whether we ought to push for a written agreement, or rather engage in a joint learning process that would lead to agreement when the communities are more knowledgeable. ~~Whatever this decision, the~~ dialogue with communities would revolve around the concept of Lead Community, the terms of the project, the planning and decision-making process, the relationship with the CUEE - including funding and the two projects.

5. Work with educators and rabbis in the community: they usually have strong views, commitments and expectations on which we will want to build.

6. Convene an ongoing (monthly?) planning seminar off the Lead Communities and the CUEE to further develop and design the concept of LC's. Given the innovative and experimental nature of the project much needs to be worked out jointly, with the best available talent joining forces for the design and planning work. This will also provide a basis for networking among LC's.

The character of the first meeting, to be convened as soon as possible, is yet to be determined (e.g. should it be a major meeting aimed at socializing, acquainting, familiarizing the leadership (lay and professional) with the ideas, staff, actors, projects, foundations, related to the CUEE, or should it be a smaller meeting of several representatives of each community and of the CUEE (see Appendix B for possible scenario).

7. Set up the various expert contributions of the CUEE;

a) Provide planning guidance and guidance for the community mobilization process (Community organization and ongoing troubleshooting). Prepare guidelines and discuss them with the communities. Assist as needed in the establishment of a strong planning group (committee, commission) with wall-to-wall representation.

b) Negotiate with foundations, organizations and purveyors of programs the nature of their involvement and their contribution to Lead Communities. Begin training them for the assignment (e.g. discuss the institutions of higher Jewish Learning their role in in-service and pre-service training, as well as their role for

the articulation of visions or goals of Jewish education; work with the JCCA, JESNA, CAJE, CIAL; approach program-oriented foundations with specific programs). This requires preparing background documents - for example what would the Israel experience be in a Lead Community - and discussing with the appropriate organization or foundation their interest in taking all or part of the program upon themselves.

c> ~~Provide funding facilitation as required.~~

d> Provide planning guidance for:

- 1> • The self-study
- 2> • The one-year plan
- 3> Pilot projects to be launched in year 11
- 4> The five-year plan

e> Complete plans for the introduction of the Best Practices project into the community and make educational consultants available to the communities.

f> Introduce the monitoring and evaluation project in the community (field researchers to conduct preliminary interviews) and help process the findings of the periodic reports (first one in January 1993)3)

g> Provide guidance for the development of vision, mission, goal-statements at institutional and community levels.

h> Appoint a key staff consultant for each community, to mediate the content ((community mobilization; building the profession) and make educational consultants available for specific needs (e.g., develop in-service training program for early childhood educators, re-invent a best-practice supplementary school model into the community) u n i t y)

i> Develop networking between communities

j> Develop means of communications and p.r.

8. Toward the end of the year: gear up towards implementation

Ongoing Work -- general SIJE Mnd related to Lead Communities

1) Board Meetings (August and February), Executive group, Board Committees (Lead Communities, Monitoring/Evaluation, Best Practices) and camper assignments

2) Senior Advisory group meetings or conference calls

3) Monthly: CIJE-Lead Communities planning seminar

4) Fundraising

5) Ongoing contacts with constituencies (organizations, purveyors of programs, foundations, lay leaders, educators, rabbis)

6) Staff meetings (for planning and discussion of educational content: twice a year)

7) Guidance to key projects

8) Networking with educators, organizations and institutions.

9) Plan the second and third years of the project.

C. Beyond Lead Communities:

Major areas of endeavor of the CIJE and suggested action in each area for the next 12 months (please note: areas 1, 2, and 3 below must be dealt with both at the continental level and in Lead Communities):

1. Community Mobilization and Communications

Plan and launch the activities that will help mobilize communities, organizations and leaders to Jewish education and create more fertile grounds for access to the resources required (beyond the three communities selected). Areas of endeavor might include:

* work with the 23 applicant communities to the Lead Communities project (or with any differently defined large group of communities) to capitalize on good will, initial interests, local initiatives. This should initially include a very limited number of activities -- until the CIJE's workload permits more: For example, during the coming year one might convene once or twice representatives of the communities to share with them two topics: findings of the Best Practices project and methodology of the Monitoring, Evaluation Feedback project and meeting with programs and representatives of programmatic foundations (CRB for Israel; Melton for the adult mini-school; Revson for media; etc.)

* launch a communications program that will continue the work begun with the publication of "A Time to Act".

In too many quarters the work of the CIJE is not known. This limits our effectiveness, particularly with reference to fundraising, and misses on important opportunities for community mobilization.

This area has not yet been planned and very limited work was done to date.

2. Building the Profession of Jewish education

JUN 12 10 10-12 PM '62
In order to deal with the shortage of qualified educators a thoughtful plan needs to be prepared concerning action required at the central or continental level. We have deferred dealing with issues such as a portable benefits plan, salary policies; what would it take to meet the shortage of qualified personnel in terms of both pre-service and in-service training (beyond the grants to the training institutions) etc... In the course of the current year we may want to begin the planning the work. (I believe this requires initially an in-house or commissioned planning piece).

3. ~~W~~: Developing a Research capability

Two steps were taken so far: the development of two major research projects to support the development effort in Lead Communities ((Bolts and Gamoran)) and the preparation of a background paper by Dr. Isa Arom. We have not yet found financial support for this project.

4. ~~U~~: Establishing Lead Communities (see above).

Fall Seminar -- Some Suggestions

An event to start work, inform, set the terms, create the dialogue.

The components might include:

1. General meeting of CIJE and lead community representatives re- the project in general and CIJE contribution. Includes CIJE and Lead Community Lay leadership. (10-20 people per community plus CIJE staff and consultants, as well as lay people for part of the meetings)

a. Communities introduce themselves, their views, hopes, ideas, past achievements, etc.

b. The CIJE (The CIJE is the process that is the lead of Community Community idea - its evolution from the Commission to today. The notion of these communities as spearheads for systemic change -- for addressing the problems of Jewish education/continuity.

2. Lay leaders to lay-leaders -- issues of funding and community mobilization

3. Vision and goals: presentation and discussion followed by work with representatives of the training institutions and others who will be leading this effort.

4. Professionals, educators, rabbis: build upon their work, commitments, convictions.

a. discussion of the project, the process, getting to work

b. The Best Practices project: presentation and discussion -- includes consultants on content

c. Monitoring, Evaluation and Feedback: same

d. Planning:

-- self study

-- pilot projects

-- one year plan

-- five year plan

e. The ongoing CIJE seminar

5. networking among Lead Communities

6. Meetings with organizations, purveyors of programs and Programmatic Foundations: -- to discuss specific interests and projects:

-- in-service training programs

-- CAJE

-- JESNA
jcca -- JCCA
-- the Melton mini-school
the CPB Foundation
etc -- etc.

7. Closing session and discussion of next steps.



CIJE - Workplan - Draft

Task Name	Start	End	1992				1993											
			Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	D
Lead Communities	15/Sep/92	02/Sep/93																
Launch Activities	15/Sep/92	02/Sep/93																
Prepare written guidelines	15/Sep/92	20/Oct/92																
Written agreement	15/Sep/92	30/Sep/92																
Planning guidelines	15/Sep/92	20/Oct/92																
Negotiate Agreement	15/Sep/92	30/Nov/92																
Present project to Community	15/Sep/92	01/Dec/92																
CUE staff preparation	15/Sep/92	01/Dec/92																
Launch Monitoring	15/Sep/92	26/Aug/93																
Introduce in community	15/Sep/92	25/Sep/92																
Develop feedback loop	15/Sep/92	30/Nov/92																
Set terms for first report	15/Sep/92	27/Nov/92																
Feedback from findings	19/Jan/93	26/Aug/93																
Launch Best Practices	15/Sep/92	02/Sep/93																
Introduce	15/Sep/92	30/Nov/92																
develop method	15/Sep/92	02/Sep/93																
provide consultants	15/Sep/92	02/Sep/93																
Vision project	15/Sep/92	31/Aug/93																
develop project	15/Sep/92	31/Aug/93																
work with lit. etc.	15/Sep/92	26/Aug/93																
Introduce in communities	16/Nov/92	26/Aug/93																
Convene first planning seminar	01/Dec/92	01/Dec/92																
Community process	15/Sep/92	26/Aug/93																
Work with educators, rabbis	15/Sep/92	27/Aug/93																
Planning guidance	15/Sep/92	26/Aug/93																
Self study	08/Nov/92	30/Apr/93																
First year plan	15/Sep/92	31/Dec/92																
Pilot projects	08/Feb/93	08/Feb/93																
Five year plan	01/Dec/92	26/Aug/93																
Work with foundations	15/Sep/92	26/Aug/93																
Work with program purveyors	15/Sep/92	26/Aug/93																
Work with national organizations	15/Sep/92	26/Aug/93																
Funding facilitation	15/Sep/92	26/Aug/93																

CJE -- Workplan -- Draft

Task Name	Start	End	1992				1993											
			Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	D
Appoint staff consultant	15/Sep/92	15/Sep/92	Δ															
Develop Networking between communiti	01/Dec/92	01/Dec/92			Δ													
Communications and pr	15/Sep/92	26/Aug/93																
Gear up towards implementation	10/Aug/93	10/Aug/93												Δ				
Ongoing	15/Sep/92	15/Sep/92	Δ															
Fundraising	15/Sep/92	02/Sep/93																
Board meetings	15/Sep/92	26/Aug/93																
Board Committees	14/Feb/93	14/Feb/93						Δ						Δ				
Executive Committee	15/Sep/92	15/Sep/92	Δ					Δ						Δ				
Senior Advisors	29/Nov/92	29/Nov/92			Δ						Δ					Δ		
Planning Seminar	31/Oct/92	31/Oct/92		Δ														
Mobilizing constituencies	30/Nov/92	26/May/93																
National organizations	15/Sep/92	31/Aug/93																
Purveyors of programs	15/Sep/92	30/Aug/93																
Foundations	15/Sep/92	26/Aug/93																
Individuals	15/Sep/92	31/Aug/93																
Educators and Rabbis	15/Sep/92	26/Aug/93																
Staff seminars	15/Sep/92	18/Oct/92		Δ			Δ				Δ			Δ				
Ongoing guidance to projects	15/Sep/92	02/Sep/93																
Networking	15/Sep/92	02/Sep/93																
Plan years two and three	12/Oct/93	30/Aug/93																
Community Mobilization and Communicati	15/Sep/92	15/Sep/92	Δ															
Plan	15/Sep/92	01/Sep/93																
From 3 to 23	08/Jan/93	26/Aug/93																
Communications program	07/Jan/93	01/Sep/93																
Building the Profession	07/Jan/93	31/Aug/93																
Plan	15/Sep/92	15/Sep/92	Δ															
Develop a Research capability	15/Sep/92	08/Sep/93																
Decide on next steps	10/Mar/93	08/Sep/93																
	15/Sep/92	15/Sep/92	Δ															
	16/Aug/93	16/Aug/93												Δ				
	16/Aug/93	16/Aug/93												Δ				

August 12, 1992

LEAD COMMUNITIES AT WORK

A. INTRODUCTION

The Commission on Jewish Education in North America completed its work with five recommendations. The establishment of Lead communities is one of those recommendations, but it is also the means for the place where the other recommendations will be played out. Indeed, a lead community will demonstrate locally, how to:

1. Build the profession of Jewish education and thereby address the shortage of qualified personnel;
2. Mobilize community support to the cause of Jewish education;
3. Develop research capability which will provide the knowledge needed to inform decisions and guide development. In Lead Communities this will be undertaken through the monitoring, evaluation and feedback project;
4. Establish an implementation mechanism at the local level parallel to the Council for Initiatives in Jewish Education, to be a catalyst for the implementation of these recommendations;
5. The fifth recommendation is, of course, the lead community itself, to function as a local laboratory for Jewish education.

(The implementation of recommendations at the continental level is discussed in separate documents.)

B. THE SCOPE OF THE PROJECT

A Lead Community will be an entire community engaged in a major development and improvement program of its Jewish education. Three model communities will be chosen to demonstrate what can happen where there is an infusion of outstanding personnel into the educational system, where the importance of Jewish education is recognized by the community and its leadership and where the necessary resources are secured to meet additional needs.

The vision and programs developed in Lead communities will demonstrate to the Jewish Community of North America what Jewish education at its best can achieve.

2. The Lead Community project will involve all or most Jewish education actors in that community. It is expected that lay leaders, educators, rabbis and heads of educational institutions of all ideological streams and points of view will participate in the planning group of the project, to shape it, guide it and take part in decisions.

3. The Lead Community project will deal with the major educational areas -- those in which most people are involved at some point in their lifetime.

- Supplementary Schools

- ■» Day Schools ii

- - JCCs .t ■■j ■■

- Israel programs

- Early Childhood programs !

In addition to these areas, other fields of interest to the specific communities will also be included, e.g. a community might be particularly interested in:

- Adult learning:

- Family education

- Summer camping

- Campus programs

- etc., . . .

4. Most or all institutions of a given area will be involved in the program (e.g. most or all supplementary schools).

5. A large proportion of the community's Jewish population will be involved.

C. VISION

A Lead Community will be characterized by its ongoing interest in the goals of the project. Educational, rabbinic and lay leaders will project a vision of what the community hopes to achieve several years hence, where it wants to be in terms of the Jewish knowledge and behavior of its members, young and adult. This vision could include elements such as:

- Adolescents have a command of spoken Hebrew;
- intermarriage decreases;
- many adults study classic Jewish texts;
- educators are qualified and engaged in ongoing training;
- supplementary school attendance has increased dramatically;
- a locally produced Jewish history curriculum is changing the way the subject is addressed in formal education;
- the local Jewish press is educating through the high level of its coverage of key issues.

The vision, the goals, the content of Jewish education will be addressed at two levels:

1. At the communal level the leadership will develop and articulate a notion of where it wants to be, what it wants to achieve.
2. At the level of individual institutions or groups of institutions of similar views (e.g., all Reform schools), educators, rabbis, lay leaders and parents will articulate the educational goals.

It is anticipated that these activities will create much debate and ferment in the community, that they will focus the work of the Lead Communities on core issues facing the Jewish identity of North American Jewry, and that they will demand of communities to face complex dilemmas and choices (e.g., the nature and level of commitment that educational institutions will demand and aspire to). At the same time they will re-focus the educational debate on the content of education.

The Institutions of Higher Jewish Learning, the denominations, the national organizations will join in this effort, to develop alternative visions of Jewish education. First steps have already been taken (e.g., JTS preparing itself to take this role for Conservative schools in Lead Communities).

D. BUILDING THE PROFESSION OF JEWISH EDUCATION

Communities will want to address the shortage of qualified personnel for Jewish education in the following ways:

1. Hire 2-3 additional outstanding educators to bolster the strength of educational practice in the community and to energize thinking about the future.
2. Create several new positions, as required, in order to meet the challenges. For example: a director of teacher education or curriculum development, or a director of Israel programming.
3. Develop ongoing in-service education for most educators in the community, by programmatic area or by subject matter (e.g., the teaching of history in supplementary schools; adult education in community centers).
4. Invite training institutions and other national resources to join in the effort, and invite them to undertake specific assignments in lead communities. (E.g. Hebrew Union College might assume responsibility for in-service education of all Reform supplementary school staff. Yeshiva University would do so for day-schools).
5. Recruit highly motivated graduates of day schools who are students at the universities in the Lead Community to commit themselves to multi-year assignments as educators in supplementary schools and JECs.

6. Develop a thoughtful plan to improve the terms of employment of educators in the community (including salary and benefits, career ladder, empowerment and involvement of front-line educators in the Lead Community development process.)

Simultaneously the CIJE has undertaken to deal with continental initiatives to improve the personnel situation. For example it works with foundations to expand and improve the training capability for Jewish educators in North America.

4.7. ESTABLISHING COMMUNITY SUPPORT

This will be undertaken as follows:

1. Establishing a wail to wail coalition in each Lead Community, including the Federation, the congregations, day schools, JCCs, Hillel etc..

2. Redefining a special relationship to rabbis and synagogues.

3. Identify a lay "Champion" who will recruit a leadership group that will drive the Lead community process.

4. Increase local funding for Jewish education.

5. Develop a vision for Jewish education in the community.

6. Involve the professionals in a partnership to develop this vision and a plan for its implementation.

7. Establish a local implementation mechanism with a professional head.

8. Encourage an ongoing public discussion of and advocacy for Jewish education.

7. THE ROLE OF THE CIJE IN ESTABLISHING LEAD COMMUNITIES:

The CIJE, through its staff, consultants and projects will facilitate implementation of programs and will ensure continental input into the Lead Communities. The CIJE will make the following available:

1. Best Practices

A project to create an inventory of good Jewish educational practice was launched. The project will offer Lead Communities examples of educational practice in key settings, methods, and topics, and will assist the communities in "importing," "translating," "re-inventing" best practices for their local settings.

1. The Best Practices initiative has several interrelated dimensions. In the first year (1991/92) the project deals with best practices in the following areas:

- Supplementary schools
- Early childhood programs
- Jewish community centers
- Day schools
- Israel Experience programs

It works in the following way:

a. First a group of experts in each specific area is nominated to work in an area (e.g., JCCs). These experts are brought together to define what characterizes best practices in their area, (e.g., a good supplementary school has effective methods for the teaching of Hebrew).

b. The experts then seek out existing examples of good programs in the field. They undertake site visits to programs and report about these in writing.

As lead communities begin to work, experts from the above team will be brought into the lead community to offer guidance about specific new ideas and programs, as well as to help import a best practice into that community.

3. Monitoring Evaluation Feedback

The ORE has established an evaluation project. Its purpose is three-fold:

a. to carry out ongoing monitoring of progress in Lead Communities, in order to assist community leaders, planners and educators in their work. A researcher will be commissioned for each Lead Community and will collect and analyze data and offer it to practitioners for their consideration. The purpose of this process is to improve and correct implementation in each Lead Community.

b. to evaluate progress in Lead Communities -- assessing, as time goes on, the impact and effectiveness of each program, and its suitability for replication elsewhere. Evaluation will be conducted by a variety of methods. Data will be collected by the local researcher. Analysis will be the responsibility of the head of the evaluation team with two purposes in mind: 1) To evaluate the effectiveness of individual programs and of the Lead Communities themselves as models for change, and 2) To begin to create indicators (e.g., level of participation in Israel programs; achievement in Hebrew reading) and a database that could serve as the basis for an ongoing assessment of the state of Jewish education in North America. This work will contribute in the long term to the publication of a periodic "state of Jewish education" report as suggested by the Commission.

e. The feedback-loop: findings of monitoring and evaluation activities will be continuously channeled to local and CIJE planning activities in order to affect them and act as an ongoing corrective. In this manner there will be a rapid exchange of knowledge and mutual influence between practice and planning. Findings from the field will require ongoing adaptation of plans. These changed plans will in turn, affect implementation and so on.

During the first year the field researchers will be principally concerned with three questions:

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

(b) What is the extent of community mobilization for Jewish education? Who is involved, and who is not? How broad is the coalition supporting the CIJE's efforts? How deep is participation within the various agencies? For example, beyond a small core of leaders, is there grass-roots involvement in the community? To what extent is the community mobilized financially as well as in human resources?

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

The first question is essential for establishing that specific goals exist for improving Jewish education, and for disclosing what these goals are. The second and third questions concern the "enabling options" decided upon in A Time to Act, the areas of improvement which are essential to the success of Lead Communities: mobilizing community support, and building a profession of Jewish education.

3. Professional services:

The CIJE will offer professional services to Lead Communities, including:

- 9- "77: r r :1'0 :;f;
- a. Educational consultants to help introduce best practices.
 - b. Field researchers for monitoring, evaluation and feedback.

4. ~~Personnel~~ facilitation

5. • Links with purveyors or supporters of programs

Q.) LEAD COMMITTEES AT WORK

~~What~~ Will this local Mechanism ((the local planning group)) do?

1. It will make sure that the content is articulated and is implemented..

2.1 Together with the team of the Best Practices project and with the Chief Education officer, it will integrate the various content and programmatic components into a whole. For example: it will integrate formal and informal programs.

It will see to it that in any given area (e.g., Israel experience) the vision piece, the goals, are articulated by the various actors and at the various levels:

by individual institutions
by the denominations
by the community as a whole.

In addition, dealing with the content will involve having a
 "dream department" or "blue skying unit," aimed at dealing
 with innovations and change in the programs in the community
 ((this is elaborated in a separate paper).

1. INITIATING THE LEAD COMMUNITY -- YEAR ONE

During its first year (1992/93) the project will include the following:

1.1- Negotiate an agreement with the CIJE including:

a. Detail of mutual obligations;

For process issues -- working relations within the community and between the community, the CIJE and other organizations

c. Funding issues;

d. Other..

2. Establish a local planning group, with a professional staff and with wall-to-wall representation.

3.1 Gearing-up activities, e.g., prepare a 1-year plan, undertake a self-study (see 6 below), prepare a 5-year plan.

4.1 Recruit and hire several outstanding educators from outside the community to begin work the following year (1993/94)..

5.1 Preliminary implementation of pilot projects that result from prior studies, interests, communal priorities.

6.1 Undertake an educational self-study, as part of the planning activities:

Some communities have recently completed social and demographic studies. Some have begun to deal with the issue of Jewish continuity and have taskforce reports on these. Teachers studies exist in some communities. All of these will be inputs into the self-study. However, the study itself will be designed to deal with the important issues of Jewish education in that community. It will include some of the following elements:

a. Assessment of needs and of target groups (clients).

b. Rates of participation.

c. Preliminary assessment of the educators in the community (e.g., their educational backgrounds).

The self-study will be linked with the work of the monitoring, evaluation and feedback project.

Some of the definition of the study and some of the data collection will be undertaken with the help of that project's field researcher.

* * * * *



הנשיא בפועל ורקטור
האוניברסיטה העברית בירושלים
מתכבד להזמין

לעצרת חגיגית

*The Rector and Acting President of
The Hebrew University of Jerusalem
cordially invites you to the*

Convocation

הענקת תואר

דוקטור לפילוסופיה ודוקטור למשפטים

באוניברסיטה העברית בירושלים

הענקת תואר

דוקטור לפילוסופיה לשם כבוד

מר ארנסט א' ברטר, הולנד	לד"ר פראנץ ורניצקי, ראש ממשלת אוסטריה
פרופ' אדוארד ויטן, ארה"ב	ד"ר שניאור זלמן אברמוב, ישראל
גב' איילה זקס-אברמוב, ישראל	פרופ' ח'ליל אינלצ'יק, טורקיה
פרופ' מריה מאיר מורנה, איטליה	אליסיה מלחמסכפה עאמר אל-סייד, ארה"ב
מר מורטון ל' מנדל, ארה"ב	און, ארחהגריד ויליאם א' בראון, ארה"ב

הענקת פרסים

פרס שלמה בובליק לשופט דוד ברטוב

פרס שמואל רוטברג למר מל רישפילד

פרס אהרון קציר

פרס אלן ברונפמן

פרס אלכס ברגר

פרס ברנרד מ' בלומפילד

הזמנה זוגית

הזמנה זו משמשת כרטיס כניסה

נא לענות ככרטיס המצורף

*the conferment of the degrees of
Doctor of Philosophy and Doctor of Laws
on graduates of the Hebrew University of Jerusalem
and the degree of
Doctor Philosophiae Honoris Causa upon*

Dr. Franz Vranitzky, Chancellor of Austria

Dr. Shneur Zalman Abramov, Israel

Prof. Halil Inalçik, Turkey

Prof. Mustafa Amar Al-Sayed, USA

Ambassador William A. Brown, USA

Mr. Ernest A. Bretter, Hollan

Prof. Edward Witten, USA

Mrs. Ayala Zaeks-Abramov, Isr

Prof. Maria Mayer Modena, It

Mr. Morton L. Mandel, USA

**the award of
the Solomon Bublick Prize to Judge David Bartov
the Samuel Rothberg Prize to Mr. Mel Reisfield**

The Aharon Katzir Prize

The Allan Bronfman Prize

The Alex Berger Prize

The Bernard M. Bloomfield Prize

admits two

admission by this invitation

RSVP

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

1. Which sub-groups should be studied?
2. What is the appropriate definition of need?

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

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

- Early childhood
- Ages 5-13
- Post Bar/Bat Mitzvah

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

Box 5: Targeting

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

- **Present knowledge:** How much is already known about the topic or the needs of the group? Has the issue or group previously been studied? Are there significant open questions about what the needs are or how they should be addressed?
- **Priority:** How high a priority is the topic or sub-group with respect to Jewish education? Are the needs of this group for Jewish education a major issue or concern in the community?
- **Feasibility:** What resources of time, effort, money are needed to answer the open questions?

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

- a. "Market:" Demand by a defined set of people.
- b. "Standard:" An objective measure of how much people require, or, from the community perspective, what is needed to realize a set of aspirations.
- c. "Receptivity:" What people might respond to, i.e. "buy", but cannot articulate because it is not within their past experience.

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

Box 6: Selecting the Measure of Need

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

- **Market** measures are most appropriate when the institutions of the community are relatively powerless to design incentives or exercise leverage to influence individual choices, other than by improving the programs that are offered.
- Conversely, **standards** will be appropriate when community institutions are in a position to offer incentives or exercise leverage, and has a clear and definable stake in the outcomes of the service area. The caliber and training of professionals is a case in point.
- It is a major undertaking, and perhaps impossible at this time, to define objective standards of how much Jewish education one should have. Similar individuals will vary dramatically in their self-perception of their own need for Jewish education.
- In a needs analysis it is virtually impossible to "measure" **receptivity**, for example to a charismatic champion. It is possible to examine programs that have been successful elsewhere to expand the vision of decision makers, particularly when it comes time to elicit or develop program strategies. In the context of the needs analysis, it is useful to ponder more ambitious alternatives when the expressed needs aspire to a low level.

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

- data on the numbers of programs, by type, their capacities and actual enrollments
- data on numbers and characteristics of personnel
- utilization of space
- levels of funding, and
- anticipated changes (including resources in the pipeline, such as new programs being planned or anticipated cutbacks).

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

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

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

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

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

Box 7: Illustrative Measures of Quality and Effectiveness

- **Measures of inputs** are generally the easiest to obtain. Examples include: per capita expenditures for various age cohorts and programs, teacher/student ratios, average teacher salaries, per cent of teachers with advanced degrees, lay involvement, number of teachers participating in in-service training, etc. Comparisons can be made to provide perspective on where the community stands in relation to other communities and the nation on key indicators.
- **Examples of output or performance measures** include per cent of eligible population participating in formal and informal Jewish education by age group, levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, etc. Methods of collecting this information include sample surveys, questionnaires to program directors, focus groups (for satisfaction), self-studies by schools, alumni surveys, data collected by a central body such as the Board of Jewish Education or Federation, and information collected in recent Jewish population studies.
- **Outcomes** are the most difficult to measure. It is useful to articulate what these might be, even if the data is not available, because it will be helpful in developing the mission statement later on as well as for suggesting lines of future research. Examples of outcome measures would be self-definition and commitment to Jewish identity, values and practices; evidence of transmission of Jewishness to the next generation; affiliation with synagogues, communal organizations, support of Israel and Jewish institutions, etc.

Benchmarks/Tasks

1. Design Needs Analysis

- a. Focus: Select the primary groups to study.
- b. Measures: Decide on the perspective for measuring the need of each group.
- c. Develop Concept Scheme: Layout decisions on design for discussion with commission.

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

3. Estimate of community need/demand.

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

Box 8: Methods

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

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

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

Profile

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

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

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

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

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

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

Box 9: Elements of an Institution or Program Profile

- **Students:**
 - . Enrollment and graduation trends
 - . Age range
- **Educators:**
 - . Numbers of full- and part-time
 - . areas of expertise.
- **Program components:**
 - . Subjects
 - . Degree(s) offered
 - . Activity duration
 - . Methods
 - . Support resources (e.g. library, training) and services
- **Finances**
 - . Cost per unit of service
 - . Revenue and expenditure trends

Deliverables

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

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

III. CRITICAL ISSUES

Rationale

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

Deliverables:

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

Benchmarks and Methods

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

Box 10: Sample Assumptions

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

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

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

Box 11: Classification of Issues

1. **Mission-level issues** -- i.e. choices relating to the vision, philosophy and the role of the community in initiating or supporting the emerging needs.
2. **Policy issues** -- i.e. choices relating to the broad policies relevant to carrying out the community's mission. Some of these choices relate to professional development (e.g. the balance between in-service and pre-service training for pre-school teachers); recruitment (e.g. the balance between new entrants into the field, continuing education, and re-training people from other fields).
3. **Standards and Program Issues** -- choices relating to the content and level of programming in Jewish education.
4. **Resource and organization Issues** -- i.e. choices relating to the internal capacity of the community to support mission and policies (e.g. the financial resources, agency roles, possible coordinative and integrative mechanisms).

IV. MISSION OR VISION STATEMENT

Rationale

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

Deliverable

A one paragraph to one page Mission Statement

Benchmarks and Methods

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

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

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

V. SETTING STRATEGIES AND PRIORITIES

Rationale

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

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

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

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

Deliverables

- List of policy recommendations for the improvement of Jewish education
- Recommended priority rank and desirable sequence for each recommendation
- List of criteria used to select and rank policy recommendations.

Benchmarks and Methods

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

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

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

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

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

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

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

Box 13: Sample Criteria for Selecting Strategies and Priorities

- Support professionalization of principals and teachers -- including incentives for higher levels of education.
- Encourage deeper communal involvement and support of Jewish education.
- Maximize effective utilization of resources (minimize duplication).
- Maximize the opportunity to integrate formal and informal educational techniques (e.g., family shabbatonim; camping + study programs; Israel study programs).

VI. DESIGNING PROGRAMS/PILOT PROJECTS

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

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

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

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

Pilot Projects

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

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

Box 14: Sample Criteria for Pilot Project Selection

- Improves professional status of teachers, principals, and informal educators
- Promises short-term success and visibility
- Maximizes the opportunity to replicate good results from other communities (e.g., via "Best Practices").
- Promotes multi-agency programming and cooperation
- Maximizes parental involvement
- Strengthens congregations

Box 15: Sample Ideas for Pilot Projects

Personnel

- In-service training for educational leadership --school principals and JCC program directors.
- In-service training for 2 teachers and 2 informal educators from each institution.
- Summer seminar in Israel for selected educators

Community Mobilization

- Leadership training program for congregational and agency board members.
- A series of public forums on "best practices" and/or the community vision.

Commission Programs

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

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

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

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

Box 16: Steps in Developing Program Recommendations

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

VII. FINANCIAL RESOURCE DEVELOPMENT

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

- Annual campaign allocations for local services (either increased amounts or reallocations)
- Creation or expansion of a fund for Jewish education
- Major donors
- Foundations (Jewish oriented, and possibly secular ones also)

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

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

1. Package most attractive program ideas
 - . Select the most engaging program ideas to showcase
 - . Package or repackage programs to be most appealing
2. Identify potential funders in different categories, e.g.:
 - . Major donors
 - . Medium/large donors
 - . Family foundations
 - . Community foundations
 - . National foundations
3. Match programs to funder interests
4. Identify person/team to make first contact. Consider enlisting Commission members for this role.
5. Follow-up, as appropriate.

VIII. PREPARE FIRST YEAR ACTION PLAN

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

We may want to include
a paragraph - inspirational or descriptive
of the head communities
project
[draft: guide.05c 12-29-92] S & ^

LEAD COMMUNITIES PLANNING GUIDE

INTRODUCTION

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

The purposes of these guidelines are to:

- establish a timeframe for planning process benchmarks so that the first stages of implementation can begin in the Fall of 1993 *U/£*
- * offer approaches, methods, data collection instruments and other tools to use in the planning process, and
- give some measure of uniformity to the planning process that each of the lead communities will engage in during the next five years.

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

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

and use these as a point of departure
for the head communities project

II. SELF-STUDY

Rationale

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

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

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

- Identify unserved and underserved needs for Jewish education, as perceived by groups within the community.
- Help identify critical issues, or choices that will need to be addressed.
- Provides a common base of information to enlighten decisions on critical issues.
- Clarify areas of agreement in moving toward establishing a standard of achievement that is acceptable within the community.

Future Hillel programs and priorities later in the p.m. should be based on the best available information on educator needs and potential users of the programs in Jewish education.

Elements of Self-Study

A self study of Jewish education in a lead community will have several elements - we are mentioning some of those that should be addressed in the first phase

(2) A needs analysis

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

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

• Inventory of personnel, institutions, organizations

2. Needs Analysis

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

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

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

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

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

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

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

Community = Committee
everybody - consultant *view it*

• Database: Allow for growth, in number of information fields as well as in number of records. N—

• Involve educators.

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

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

Box 4: Educators' Survey: Suggested Categories for Inventory *(illustrative only)*

- Demographic profile (e.g., sex, age, marital status, address)
- Affiliation preference
- ~~Religious~~ education background (e.g., degrees, Jewish and secular licensure, progress toward National Board licensure)
- In-service staff development (particularly courses and workshops taken in the community) *(5/19/47, scope, level)*
- Jewish education experience (e.g., years of experience, present and recent positions, full-time and part-time; camp, other summer and other part-time jobs)
- Secular education positions *position, Jewish History*
- Salary history, in Jewish education
- Inventory of formal and informal expertise (e.g., Judaic/Hebrew; age level specializations; teacher training, resource room management, special education; organizing, supervisory or administrative skills). Classifiable as:
 - Areas of knowledge
 - Skills
 - Special talents
- Attitudinal questions (e.g., Jewish education career intentions; job satisfaction and priority concerns)

I. FIRST STEPS

Rationale

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

Major Activity Areas

There are two major areas for attention:

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

Building a "wall-to-wall coalition" is one of the central objectives of the Lead Communities project. A widening net of stakeholder involvement in Jewish education is the instrument for engaging a larger portion of the Jewish community. The mobilization of ~~lay~~ leadership is an pivotal starting point for achieving that objective. (all education is an important initial step)

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

Tasks

1. Identify ~~key~~ leadership, including:

- (Champion) is this word appropriate?
- Lay leaders and major donors
 - Educators
 - Rabbis
 - Professionals

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

- * Federation
- Synagogues
- Community agencies and organizations
- Schools and programs

2. Formal educational settings
 - Schools
 - Synagogues

3. Informal settings
 - JCCs

6. Community agencies and organizations dealing with education.

Box 1: Concentric Circles of Leadership

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

- Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.
- Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.
- Task Forces, to address substantive issues and make recommendations to the full commission, and/or to monitor and evaluate projects once they begin operations. (See below.)
- Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

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

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

Box 2: Examples of Background Materials

• A Time To Act

~~Letter of CIJE letter of agreement~~

- Previous planning documents, particularly on Jewish education or continuity, prepared by your community.
- *other studies and documents relating to the community's educational system*
- Summary of most recent Jewish population study for your community.
- CIJE project descriptions
 - ***Best Practices Projects*
 - Monitoring, Evaluation and Feedback

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

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

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

Box 3: Illustrative Planning Framework

Phase	Deliverable	Committee Meeting Subject
1. Start-up	<ul style="list-style-type: none"> (1) • Form committee • Detailed workplan • Agree on mandate (2) • Form committees 	<ul style="list-style-type: none"> 1a. Major issues in Jewish Education 1b. Review of workplan 1c. Develop "charge" to committees
2. Self-study (Needs Analysis and Profile) (ongoing)	<ul style="list-style-type: none"> • Design scheme • Profile of Jewish education; strengths and weaknesses • Report on findings • Profile Survey of educators in the community 	<ul style="list-style-type: none"> 2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	<ul style="list-style-type: none"> • Formulate issues 	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	<ul style="list-style-type: none"> • Draft community mission statement 	4. Approve mission/vision statement(s)
5. Strategies and Priorities for Action	<ul style="list-style-type: none"> • List of recommendations for each major client group with priority rankings and priority sequencing 	5. Recommendations on priorities
6. Programs	<ul style="list-style-type: none"> • Draft guidelines • Define program priority areas and new initiatives • Issue call for program proposals 	6. Define program priorities
7. Financial Resource Development	<ul style="list-style-type: none"> • Fundraising plan (e.g., potential donors, strategies, targets, timetable) 	7. Approve and agree on assignments for carrying out plan.
8. First year action plan	<ul style="list-style-type: none"> • Draft budget with resource objectives • Sample summaries of program options • Prepare first year implementation plan 	<ul style="list-style-type: none"> 8a. Set resource objectives (\$) 8b. Select programs for next year 8c. Approve overall implementation plan

- 1a. (The) Head Committees and the community
- a. Main thrusts
- personnel
 - community mobilization
- b. Key Methods and Projects
- Best Practices
 - dealing with goals
 - handling the monitoring evaluation feedback projects
- c. Structures: (the) STC and an head Community Council

2. Review of Workplan

3. Develop Charge to Committees

3. Devise task force structure

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

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

- Population groups, e.g.:
 - 1 - 55: early childhood
 - 6 - 13: elementary school age
 - 14 - 18: high school/post bar/bat-mitzvah
- Delivery system, e.g.:
 - Day schools
 - Supplementary schools
 - Informal programs in informal settings
- Functional, the classic "Board of Directors" model, e.g.:
 - Pilot projects
 - Best practices
 - Fundraising
 - Coalition building and marketing/networking
 - Monitoring and evaluation
 - Educator's survey
 - Five year planning
 - On the goals of Jewish Education
- Programmatic, e.g.:
 - Personnel
 - Israel experience
 - Synagogue programs

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

- Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.
- Energizing: Whether topic areas are likely to generate ~~enthusiasm~~ among potential committee participants and stakeholders.
- ① Priorities: Do the topics represent articulated, or likely, priority areas of the community or the commission. *Community Project*

- Main thrusts of the Recommendations of the Commission on Jewish Education in North America
 - Personnel
 - Community Mobilization
 - Research / Self-study
 - Educator's survey
 - Israel Experience

(leave as is)

May and personally

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

MEMORANDUM

To: Annette Hochstein
Ginny Levi

From: Jim Weber / ~~_____~~

Date: February 4, 1993

Re: Attached draft of Planning Guide

Hope you had easy return flights.

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

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LEAD COMMUNITIES PLANNING GUIDE

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

*Professor Isadore Twersky
A Time to Act, p. 19*

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

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

A Time to Act, pp. 15 & 16

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

INTRODUCTION

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

The purposes of these guidelines are to:

- offer approaches, methods, data collection instruments and other tools to use in the planning process, and
- give some measure of uniformity to the planning process that each of the lead communities will engage in.

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

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

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

I. FIRST STEPS

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

A Time to Act, p. 68

Rationale

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

Major Activity Areas

There are two major areas for attention:

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

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

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

Tasks

1. Identify and recruit key leadership, including:

- Chair

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

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

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

Box 1: Concentric Circles of Leadership

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

- Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.
- Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.
- Task Forces, to address substantive issues and make recommendations to the full Commission, and/or to monitor and evaluate projects once they begin operations (see below.)
- Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

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

Box 2: Examples of Background Materials

- A Time To Act
- Previous planning documents, particularly on Jewish education or continuity, prepared by your community.
- Other studies and documents relating to the community's educational systems.
- Summary of most recent Jewish population study for your community.
- CJE project descriptions
 - ⊙ "Best Practices"
 - ⊙ Monitoring, Evaluation and Feedback
 - ⊙ Goals Project

3. Convene Commission

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

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

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

Box 3: Illustrative Planning Framework

<u>Phase</u>	<u>Deliverable</u>	<u>Commission Meeting Subject</u>
1. Start-up	<ul style="list-style-type: none"> • Form Commission <ul style="list-style-type: none"> - Discuss the idea - Detailed workplan - Agree on mandate • Form committees 	1a. Review of project key ideas, aims and structures 1b. Review of workplan: Key methods and projects <ul style="list-style-type: none"> - Best Practices - dealing with goals - Monitoring evaluation feedback project 1c. Develop charge to committees: main thrusts: <ul style="list-style-type: none"> - personnel - community mobilization
2. Start Self-study (ongoing)	<ul style="list-style-type: none"> • Design scheme • Profile of Jewish education: strengths and weaknesses • Survey of educators in the community • Report on findings 	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	<ul style="list-style-type: none"> • Formulate issues 	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	<ul style="list-style-type: none"> • Draft community mission statement 	4. Approve mission/vision statement
5. Strategies and Priorities for Action	<ul style="list-style-type: none"> • List of recommendations for each major area (personnel, community mobilization, Israel experience) with priority rankings and priority sequencing 	5. Recommendations on priorities
6. Programs	<ul style="list-style-type: none"> • Confer with CIJE, Best Practices • Draft guidelines • Define program priority areas and new initiatives • Issue call for program implementation proposals 	6. Define program priorities
7. Resource Development	<ul style="list-style-type: none"> • Fundraising plan (e.g., potential donors, strategies, targets, CIJE assistance, timetable) 	7. Approve and agree on assignments for carrying out plan.
8. Subsequent year action plan	<ul style="list-style-type: none"> • Draft budget with resource objectives • Compile summaries of program options • Prepare first year implementation plan 	8a. Select programs for next year 8b. Approve overall implementation plan 8c. Set resources objectives (S)

4. Devise task force structure

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

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

- Main thrusts of the recommendations of the Commission on Jewish Education in North America
 - personnel
 - community mobilization
 - research/self-study
 - Israel experience
- Delivery settings, e.g.:
 - day schools
 - supplementary schools
 - programs in informal settings
- Functional, the classic "Board of Directors" model, e.g.:
 - pilot projects
 - best practices
 - goals/visions of Jewish education
 - monitoring and evaluation
 - fundraising
 - coalition building and marketing/networking
 - educator's survey
 - five year planning

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

- Energizing: Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.
- Priorities: Do the topics represent articulated, or likely, priority areas of the Lead Communities Project.
- Content expertise: How do staff knowledge and other resource experts relate to the potential topics? Do any of the organizing approaches make better use of available human resources?
- Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.

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

H. SELF-STUDY

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

A Time to Act, p. 31

Rationale

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

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

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

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

1. A *profile* of the Jewish education enterprise in the community, including the following:
 - Participation (absolute numbers, rates and trends)
 - Inventory of personnel, programs, institutions, organizations
 - Program resources
 - Financial resources
2. A *needs analysis* to focus during the first year on personnel-related issues, a central part of which will be an educator's survey.
3. A *follow-on agenda* for continuing analysis during years 2-5.

1. Profile

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

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

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

- A profile of the institutional resources, programs and services presently available in the community.
- Present enrollments and participation rates (i.e., percent of group attending), and recent enrollment/participation trends.
- Estimate of the capacity of each program if it is not being fully utilized.

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

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

- Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood, camps counselors, JCC program staff, other informal education personnel) by institution/program
- Employment status (full-time, part-time) and years of service (e.g. in current position, in Jewish education in community)
- Qualifications, skills, expertise and background
- Salary and benefit levels

Box 4: Elements of an Institution or Program Profile

- **Organizational:**
 - ⊗ type of institution, program (e.g., day school, camp, retreat center, etc.)
 - ⊗ denominational affiliation
- **Students:**
 - ⊗ enrollment and graduation trends
 - ⊗ age range
- **Educators:**
 - ⊗ numbers of full- and part-time
 - ⊗ areas of expertise
 - ⊗ qualifications
 - ⊗ turnover/retention rates
- **Program components:**
 - ⊗ subjects
 - ⊗ degree(s) offered
 - ⊗ in-service staff development
 - ⊗ activity duration
 - ⊗ methods
 - ⊗ support resources (e.g. library, training) and services
- **Finances**
 - ⊗ cost per unit of service
 - ⊗ revenue and expenditure trends
 - ⊗ major sources of revenue

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

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

2. Needs Analysis

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

- Educator's survey

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

Educators' Survey

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

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

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

- Purpose of the survey: E.g.
 - to provide detailed profile of personnel characteristics
 - to understand personnel strengths, weaknesses and needs (e.g. qualifications, turnover, shortage areas)
 - to establish a database for future comparisons
- Potential uses, outcomes. E.g.:
 - to identify in-services training needs
 - to understand the structure of employment (is most of the work force very much part-time, vocational, or avocational, reasonably well paid, or not)
 - to identify priorities for recruitment
- Categories of Information: What information is desired (see Box 4)
- Database: Allow for growth, in number of information fields as well as in number of records
- Involve educators from formal and informal settings
- Select survey director, or researcher with requisite expertise. In selecting staff, or

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

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

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

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

Market Analysis

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

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

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

1. Targeting: which client sub-group should be studied first?
2. Measures of Need: what is the appropriate definition of need?

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

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

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

Box 6: Targeting

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

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

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

- a. "Market:" *Actual* demand by a defined set of people.
- b. "Standard:" A measure of how much people require, or, from the community perspective, what is needed to realize a set of aspirations.
- c. "Receptivity:" What people might *potentially* respond to, i.e. "buy", but cannot articulate because it is not within their past experience.

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

Box 7: Selecting the Measure of Need

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

- **Market** measures are most appropriate when the institutions of the community are relatively powerless to design incentives or exercise leverage to influence individual choices, other than by improving the programs that are offered.
- Conversely, **standards** will be appropriate when community institutions are in a position to offer incentives or exercise leverage, and have a clear and definable stake in the outcomes of the service area. The caliber and training of professionals is one case in point. Another example is the quality of the curriculum.
- In a needs analysis it is virtually impossible to "measure" receptivity, for example to a charismatic teacher or leader, to an effective new recruitment strategy, or to a climate that has been transformed by the involvement and participation of new actors and stakeholders. It is possible to examine programs that have been successful elsewhere to expand the vision of decision makers, particularly when it comes time to elicit or develop program strategies. In the context of the needs analysis, it is useful to ponder more ambitious alternatives when the expressed needs aspire to a low level.

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

- Data on the numbers of programs, by type, their capacities (in terms of openings, places) and actual enrollments
- Data on numbers of personnel (reprise from profile or survey) qualified for different program types -- as a measure of shortages or capacity to serve more participants
- Utilization of space
- Levels of funding
- Anticipated changes (including resources in the pipeline, such as new programs being planned or anticipated cutbacks)

Measures of Quality

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

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

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

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

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

Box 8: Illustrative Measures of Quality and Effectiveness

- **Measures of inputs** are generally the easiest to obtain. Examples include: per capita expenditures for various age cohorts and programs, teacher/student ratios, average teacher salaries, per cent of teachers with advanced degrees, lay involvement, number of teachers participating in in-service training, curriculum units developed and introduced, increases/decreases in educator/participant contact hours, and etc. Comparisons can be made to provide perspective on where the community stands in relation to other communities and the nation on key indicators.
- Examples of **output or performance measures** include per cent of eligible population participating in formal and informal Jewish education by age group, levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, etc. Methods of collecting this information include sample surveys, questionnaires to program directors, focus groups (for satisfaction), self-studies by schools, alumni surveys, data collected by a central body such as the Board of Jewish Education or Federation, and information collected in recent Jewish population studies.
- **Outcomes** are the most difficult to measure. It is useful to articulate what these might be, even if the data is not available, because it will be helpful in developing the mission statement later on as well as for suggesting lines of future research. Examples of outcome measures would be self-definition and commitment to Jewish identity, values and practices; evidence of transmission of Jewishness to the next generation; affiliation with synagogues, communal organizations, support of Israel and Jewish institutions, etc.

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

- Communication and collaboration between program professionals and rabbis
- Involvement of teachers, educators in informal settings in articulating problems and solutions
- The size (and growth) of the cadre of committed and supportive lay leaders, parents and/or donors
- The presence (or absence) of regular publicity/information announcements about Jewish education programs, performances, or initiatives (e.g. columns in the local Jewish newspapers, community program catalogues, regular flyers, etc.)

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

Summary of Benchmarks/Tasks

1. Design Needs Analysis
 - a. Focus: Select the primary element, issue or program to be studied
 - b. Measures: Decide on the method(s) for measuring the needs (see Box 8)
 - c. Develop Concept Scheme: Layout decisions on design for discussion with commission
2. Collect Information: on present participation levels
3. Estimate Community Need/Demand
4. Gaps [3 minus 2]: a comparison of the market demand for the present programs will give an estimate of the unmet needs: who are the "unserved" or "underserved" groups in the community from the point of view of adult Jewish education?
5. Qualitative Analysis: compile findings on problems, and limitations on program quality or effectiveness and recommendations for improvement
6. Community Mobilization Impacts: compile findings and recommendations on recruitment and deeper involvement of students, personnel, leadership, parents and other stakeholders

Box 9: Methods

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

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

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

3. Follow-on Agenda

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

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

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

III. CRITICAL ISSUES

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

A Time to Act, p. 25-26

Rationale

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

Deliverables:

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

Benchmarks and Methods

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

Box 10: Sample Assumptions

1. Shortages in qualified Jewish education personnel will not be satisfactorily overcome until a series of systemic problems in the profession are addressed (e.g., salaries, training, career opportunities, empowerment in decision making) -- not just one element.
2. Talented young adults can be enticed to enter careers in Jewish education if major communal leaders (lay, rabbis, educators, professionals) take an active role in the recruitment process.
3. Significant levels of increased funding for Jewish education will not materialize if community leaders are not included early in the planning and decision on actions.
4. Jewish education has a more powerful impact on students when formal and informal experiences are linked.
5. The delivery system needs to offer an opportunity for balance (creative tension) between community-wide perspectives and the perspectives of the religious movements (Reform, Conservative, Reconstructionist and Orthodox).

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

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

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

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

Box 11: Classification of Issues

1. **Mission-level issues** -- i.e. choices relating to the vision, philosophy and the role of the community in initiating or supporting the emerging needs.
2. **Policy issues** -- i.e. choices relating to the broad policies relevant to carrying out the community's mission. Some of these choices relate to professional development (e.g. the balance between in-service and pre-service training for pre-school teachers); recruitment (e.g. the balance between new entrants into the field, continuing education; re-training people from other fields); and community mobilization (e.g., the trade-offs between early action to create a sense of community support, versus the slower process of involvement of stakeholders in planning to build ownership).
3. **Standards and Program Issues** -- choices relating to the content and level of programming in Jewish education (e.g. what form of in-service training: mentoring program, workshops and course offerings, personalized growth plan for each educator, some of each, or what kind of staff development incentive plan: completion bonus, waived fees, contractual requirement).
4. **Resource and organization Issues** -- i.e. choices relating to the present or, more importantly, future capacity of the community to support mission and policies (e.g. the financial resources, agency roles, possible coordinative and integrative mechanisms). Stated differently, which actors, agents, or agencies will be/must be responsive to change on its Jewish education agenda.

IV. MISSION OR VISION STATEMENT

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

A Time to Act, P. 27

Rationale

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

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

Deliverable

A concise mission statement.

Benchmarks and Methods

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

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

Box 12: Illustrative Mission/Options Chart

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

V. SETTING STRATEGIES AND PRIORITIES

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

A Time to Act, p. 28

Rationale

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

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

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

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

Deliverables

- List of policy recommendations for the improvement of community mobilization
- Recommended priority rank and desirable sequence for each recommendation
- List of criteria used to select and rank policy recommendations

Benchmarks and Methods

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

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

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

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

- Criteria that are suggested by analyses of community needs in other areas. Other things being equal, one would tend to give priority to settings where the total needs are very large (e.g. personnel for supplementary schools) or where the gap between existing and needed services is the largest (e.g. in-service education).
- Criteria that derive from the community's mission statement.
- Criteria that derive from continental experience in planning for Jewish education. CIJE may be able to provide assistance in this area.

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

Box 13: Sample Criteria for Selecting Strategies and Priorities

- Supports professionalization of principals, teachers, and educators in informal settings -- including incentives for higher levels of education.
- Broadens lay leader involvement and support of Jewish education.
- Maximizes effective utilization of resources (minimize duplication).
- Maximizes the opportunity to integrate formal and informal educational techniques (e.g., family shabbatonim; camping + study programs; Israel study programs).
- Incorporates principles and methods that work, as documented by CIJE's "Best Practices" project.

VI. DESIGNING PROGRAMS/PILOT PROJECTS

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

A Time to Act, p. 26

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

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

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

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

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

Pilot Projects

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

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

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

Box 15: Sample Criteria for Pilot Project Selection

- Improves the profession (teachers, principals, and informal educators)
- High visibility -- likely to reinforce community mobilization efforts (e.g. catalyze stakeholder support)
- Maximizes the opportunity to replicate good results from other communities (e.g., via "Best Practices")
- Promotes multi-agency programming and cooperation
- Draws upon the resources and expertise of national training organizations (i.e., via CIJE partnerships)
- Can feasibly be implemented quickly

Box 16: Sample Ideas for Pilot Projects

Personnel

- In-service training for educational leadership --school principals and JCC program directors.
- In-service training for 2 teachers and 2 informal educators from each institution.
- Summer seminar in Israel for selected educators

Community Mobilization

- Leadership training program for congregational and agency board members
- A series of public forums on the Lead Community idea, "Best Practices" and/or goals and visions for Jewish education

Commission Programs

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

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

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

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

Box 17: Steps in Developing Program Recommendations

- Adapt commission criteria for evaluating ideas
- Develop list of promising program ideas: review "Best Practices" materials for promising programs, confer with CIJE, best practices sites, and/or national institutions
- Review most promising ideas for content, scope of impact, and quality
- Test assumptions: define questions and obtain answers
- Review with CIJE, national experts, and local users
- Detail program needs, operations and implementation
- Estimate costs
- Set priorities and phasing among program ideas
- Present priorities and justification to Commission

VII. FINANCIAL RESOURCE DEVELOPMENT

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

A Time to Act, p. 41

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

- Annual campaign allocations for local services (either increased amounts or reallocations)
- Creation or expansion of a fund for Jewish education
- Major donors
- Foundations (Jewish oriented, and possibly secular ones also)

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

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

1. Identify potential funders in different categories, e.g.:
 - Major donors
 - Medium/large donors
 - Family foundations
 - Community foundations
 - National foundations
2. Review strategies with CIJE
3. Match programs to funder interests
4. Identify person/team to make first contact. Consider enlisting Commission members for this role.
5. Follow-up, as appropriate.

12/11/93
GJK

TO: Dr. Shulamith Elster

January 18,, 1992

From Annette Hochstein & Shmuel Wygoda



Dear Shulamith,

Re: The Planning Guide

We are forwarding to you a heavily revised version of the first part of the planning guide. Of course what I added needs language editing to fit within the tone of the whole document. We would love to have your comments on this and would appreciate your giving copies to Art Rotman and Jim Meier/Jack Ukeles. Would you like to set up a conference call with Jim, Jack, yourself and us here to discuss the next draft? It would be great if that could be the final one.

Best regards,

Annette

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OK

[draft: guide.05c 12-29-92]

LEAD COMMUNITIES PLANNING GUIDE

INTRODUCTION

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

The purposes of these guidelines are to:

~~provide information for planning and to provide a framework for the planning process~~

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

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

of COSTSE

Each community will need to tailor these guidelines to its own circumstances. ~~Some~~

~~These guidelines are intended to provide a framework for the planning process and to provide a framework for the planning process~~

As a general principle the object is to build upon the work and the research that has already been done in each community. ~~On the other hand, it is sometimes necessary to retrace steps in order to enlist new constituents in a broad coalition.~~

Mark VJ5 Koi as a point of departure
for the Lead Communities project

I. FIRST STEPS

Rationale

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

Major Activity Areas

There are two major areas for attention:

1. Initial mobilization of ~~key~~ leadership (lay and professional)
2. Introducing the idea into the community
or the education actors (language) in the community

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

Element

אחד מן היסודות

Lead Communities

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

possible

Tasks

and recruit

1. Identify ~~key~~ leadership, including:

(Champion) is this word appropriate?

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

Lead Community

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

includes top leadership from each of these groups and that

1. Federation

4. Communal organizations and organizations working with education.

2. Formal educational settings

= schools

= synagogues

3. Informal educational settings

= see 3

= youth groups, etc.

Box 1: Concentric Circles of Leadership

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

- Steering committee, composed of 10-15 members, delegated by the Commission to handle active operational responsibilities and decisions. The Steering Committee would meet approximately monthly, the full Commission every 3 months.
- Commission, composed of 35-50 members, serves as a forum for priority setting, policy development, long-range planning, coordination, and review of task forces recommendations.
- Task Forces, to address substantive issues and make recommendations to the full commission, and/or to monitor and evaluate projects once they begin operations. (See below.)
- Ad Hoc Working Groups, to be set up on an ad hoc basis by individual task forces to investigate special issues, work out program implementation details, confer with end users to ensure receptivity to program ideas or refine details, etc.

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

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

Box 2: Examples of Background Materials

- A Time To Act

[REDACTED]

- Previous planning documents, particularly on Jewish education or continuity, prepared by your community.
- Other studies and documents relating to the community's education system.
- Summary of most recent Jewish population study for your community.
- CIJE project descriptions
 - "Best Practices"
 - Monitoring, Evaluation and Feedback

4. » Goals for the Project

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

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

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

Box 3: Illustrative Planning Framework

<u>Issue</u>	<u>Deliverable</u>	<u>Committee Meeting Subject</u>
1. Self-study (Needs Analysis and Profile)	<ul style="list-style-type: none"> (1) • Form committee <ul style="list-style-type: none"> • Detailed workplan • Agree on mandate (2) • Form committees 	1a. Major issues in Jewish Education 1b. Review of workplan 1c. Develop "charge" to committees
2. Self-study (Needs Analysis and Profile)	<ul style="list-style-type: none"> • Design scheme • Profile of Jewish education; strengths and weaknesses • Report on findings 	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	<ul style="list-style-type: none"> • Formulate issues 	3. Resolve strategic issues; make choices
4. Mission or Vision Statement	<ul style="list-style-type: none"> • Draft community mission statement 	4. Approve mission/vision statement(s)
5. Strategies and Priorities for Action	<ul style="list-style-type: none"> • List of recommendations for each major client group with priority rankings and priority sequencing 	5. Recommendations on priorities
6. Programs	<ul style="list-style-type: none"> • Draft guidelines • Define program priority areas and new initiatives • Issue call for program proposals 	6. Define program priorities
7. Financial Resource Development	<ul style="list-style-type: none"> • Fundraising plan (e.g., potential donors, strategies, targets, timetable) 	7. Approve and agree on assignments for carrying out plan
8. First year action plan	<ul style="list-style-type: none"> • Draft budget with resource objectives • Compile summaries of program options • Prepare first year implementation plan 	8a. Set resource objectives (S) 8b. Select programs for next year 8c. Approve overall implementation plan

see retype!



Phase	Deliverable	Committee Meeting Subject
1. Start up	(1) Form commission <ul style="list-style-type: none"> * Discuss the idea * Detailed workplan * Agree on mandate (2) Form committees	1. Meet The Lead Communities <i>Project in light of our community</i> <ol style="list-style-type: none"> Main thrusts <ul style="list-style-type: none"> - personnel - community mobilization Key methods and projects <ul style="list-style-type: none"> - best practices - dealing with goals - Monitoring evaluation feedback projects Structures: CUE and Lead Community Commission
2. Start self-study (ongoing)	<ul style="list-style-type: none"> * Design scheme * Survey of educators in the community * Profile of Jewish education; strengths and weaknesses * Report on findings 	2. Review of workplan 3. Develop charge to committees * Design educator's survey * Presentation of profile * Discussion of findings
Critical Issues	<ul style="list-style-type: none"> * Formulate issues 	3. Resolve strategic issues; make choices
Mission or Vision Statement	<ul style="list-style-type: none"> * Draft community mission statement 	4. Approve mission/vision statement
5. Strategies and Priorities for Action	<ul style="list-style-type: none"> * List of recommendations for each major area (personnel, community mobilization, Israel Education) with priority rankings and priority sequencing 	5. Recommendations on
6. Programs	<ul style="list-style-type: none"> * Draft guidelines * Define program priority areas and new initiatives 	6. Define program priorities
7. Financial Resource Development	<ul style="list-style-type: none"> * Fundraising plan (e.g., potential donors, strategies, targets, timetable) 	7. Approve and agree on assignments for carrying out plan.
8. First Year Action Plan	<ul style="list-style-type: none"> * Draft budget with resource objectives * Prepare first year implementation plan 	8a. Select programs for next year 8b. Approve overall implementation plan 8c. Set resources objectives (\$)

3. Devise task force structure

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

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

• Population groups, e.g.:

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

• Delivery system, e.g.:

- .. Day schools
- .. Supplementary schools
- .. Informal programs

• Functional, the classic "Board of Directors" model, e.g.:

- .. Programs
 - Pilot projects
 - Best practices
- .. Fundraising
- .. Coalition building and marketing/networking
- .. Monitoring and evaluation
- .. Educator's survey
- .. Five year planning

• Programmatic, e.g.:

- .. Personnel
- .. Israel experience
- .. Synagogue programs

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

- Bridge building: Likelihood of fostering collaboration, of enlisting membership in each committee that is representative of multiple constituencies.
- Energizing: Whether topic areas are likely to generate excitement among potential committee participants and stakeholders.
- Priorities: Do the topics represent articulated, or likely, priority areas of the community or the commission.

See Retype →

3. Devise task force structure

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

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

* Main thrusts off the recommendations off the Commission on Jewish Education in North America

- * Personnel
- * Community mobilization
- * Research/self-study
- * ~~Needs~~ Experience

* Delivery systems, e.g.:

- * Day schools
- * Supplementary schools
- * Programs in informal settings

* Functional, the classic "Board of Directors" model, e.g.:

- * Pilot projects
- * Best practices
- * On the goals of Jewish education
- * Monitoring and evaluation
- * Fundraising
- * Coalition building and marketing/networking
- * Educator's survey
- * Five year planning

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

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

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

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

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

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Facsimile Transmission

To: Dr. Shulamith Elster Date: January 20., 1992
From: Annette Hochstein No. pages: 57
Fax Number: _____

Dear Shulamith,,

This is the second installment of the self-study.. I am waiting for you to set up the conference call with Jack/Jim. There is some urgency to this as we would like the guide to go to the communities in early February..

Best regards,,

Annette

PS. Please forward to Jack, Jim and Art. Thanks..

Second Installment

H. SELF-STUDY

Rationale

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

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

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

- Identifies unserved and underserved needs for Jewish education, as perceived by groups within the community.
- Helps identify critical issues, or choices that will need to be addressed.
- Provides a common base of information to enlighten decisions on critical issues.
- Clarify areas of agreement in moving toward establishing a standard of achievement that is acceptable within the community.

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

see attached pages →

Elements of Self-Study

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

(1) A needs analysis

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

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

[I recommend that the profile come first - with the inventory and participation rate - with general demographic data first.

Whether personnel is recommended in the profile, in light of the study under needs analysis.

V. Needs Analysis

A needs analysis identifies unserved and underserved needs for Jewish education.

Given an Ark (and its centrality in the head Communes project)

Educators' Survey: The critical importance of personnel in Jewish education, an educators' survey be an early and major component of the needs analysis. Quality information about this fundamental human resource is invaluable, first for identifying priorities for improving the profession, and later for assessing the impact of community initiatives. Box 4 contains ideas examples for areas to cover in a survey of Jewish education personnel. A few such comprehensive interviews have been taken over the past year. A main source as possible examples, to be adapted to the needs of your community (e.g., Los Angeles, Miami).

Make sure to involve a social scientist in the design, the implementation, and the analysis of the survey. You may very well find an expert researcher who can use

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

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

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

• The purpose of the survey:

= to identify in-service training needs

= to understand the structure of employment (is most of the work force very much part time, vocational, or avocational, reasonably well paid, or not):

II. THE SELF-STUDY

Rationale

Good information is the foundation of good decision making. Yet

"very little research on Jewish education is being carried out in North America. There is a paucity of data about the basic issues and almost no evaluation has been made to assess the quality and impact of programs. Because of this, decisions are taken without the benefit of clear evidence of need, and major resources are invested without sufficient monitoring. We do not know what people want to learn and we seldom know what works in Jewish education. We do not even know much about what students know at different stages in their education. There are not enough standardized achievement tests. There is not sufficiently accurate information on the number of teachers in the system, their qualifications and their salaries."

A Time to Act, p. 44

Creating reliable knowledge for decision making about a community's educational system is an exciting and long-term endeavour. Lead communities can offer leadership in this area too, developing means, methods and experience for an ongoing process of self-study. That process would yield over time the quantitative and qualitative data required by leadership to know what exists in the community's Jewish education system, how good it is, what people in the community want, what more is needed and what works better. Hopefully, the tools developed in lead communities will be disseminated for other communities to adopt and adapt.

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

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

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

- * Participation (absolute and participation rates);
- * Inventory of programs, institutions, organizations;
- * Program resources;
- * Financial resources.

2. A needs analysis -- to focus during the first year on personnel-related issues..

3. A research design for years 2-5,, in the course of which further in-depth studies might be undertaken and data collection completed. This phase might include qualitative elements such as achievement measures ((what do supplementary school students know))..

((Add market stuff here))

Database:

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

- Involve educators.

Someone to lead the survey. Select researcher to insure expertise.
 * Select assignments. In selecting staff, or contracting with a researcher, thoroughly review expectations and workplans.

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

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

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

Dear Jack and Jim,

I have attempted to illustrate by amending a significant part of the planning guide how one would move from a general planning document for Jewish education to one that is specifically targeted at the content,, the goals,, the priorities of the lead communities project.. I hope that the thrust of change is clear,, and think that it would be useful if you would take it from there and do the same thing for the remaining parts of the document -- from "client groups" and "institutions" in the needs analysis, to "the rationale" (page 18) and the mission statement.. You may find some of the CIJE's documents,, and before that the Commission documents, useful for this change.. In particular,, the document on "lead communities at work" and the Commission report may be helpful..

I am, of course,, available for any further clarification and hope that this is useful. We would love to have the document in the hands of the community by the end of the month or early in February.

Best regards,

Annette

-the common goal consider

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

1. Which ~~some~~ groups should be studied? *(pl i A C A J)*

2. What is the appropriate definition of need? *(program availability, quality, content scope of program)*

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

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

- Early childhood ^
- Ages 5-18
- ~~Peg~~ Bar/Bat Mitzvah

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

Box 5: Targeting

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

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

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

- **Feasibility:** What resources of time, effort, money are needed to answer the open questions? *particular area knowledge, the staff person available?*

11:51 DMJ

WvaajJt

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

- Get this P^W 1+J gLj. ' 1 f0*
- "Market:" Demand by a defined set of people. *IC agreed*
 - "Standard:" An objective measure of how much people require, or, from the community perspective, what is needed to realize a set of aspirations. *what should a st*
 - "Receptivity:" What people might respond to, i.e. "buy", but cannot articulate because it is not within their past experience.

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

Box 6: Selecting the Measure of Need

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

- **Market** measures are most appropriate when the institutions of the community are relatively powerless to design incentives or exercise leverage to influence individual choices, other than by improving the programs that are offered.
- Conversely, **standards** will be appropriate when community institutions are in a position to offer incentives or exercise leverage, and has a clear and definable stake in the outcomes of the service area. The caliber and training of professionals is a case in point.
- It is a major undertaking, and perhaps impossible at this time, to define objective standards of how much Jewish-education one should have. Similar individuals will vary dramatically in their self-perception of their own need for Jewish education. *to what purpose, what content, etc*
- In a needs analysis it is virtually impossible to "measure" receptivity, for example to a charismatic champion. It is possible to examine programs that have been successful elsewhere to expand the vision of decision makers, particularly when it comes time to elicit or develop program strategies. In the context of the needs analysis, it is useful to ponder more ambitious alternatives when the expressed needs aspire to a low level. *Galit best practices*

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

- data on the numbers of programs, by type, their capacities and actual enrollments
- data on numbers and characteristics of personnel
- utilization of space
- levels of funding, and
- anticipated changes (including resources in the pipeline, such as new programs being planned or anticipated cutbacks).

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

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

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

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

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

Box 7: Illustrative Measures of Quality and Effectiveness

- **Measures of inputs** are generally the easiest to obtain. Examples include: per capita expenditures for various age cohorts and programs, teacher/student ratios, average teacher salaries, per cent of teachers with advanced degrees, lay involvement, number of teachers participating in in-service training, etc. Comparisons can be made to provide perspective on where the community stands in relation to other communities and the nation on key indicators.
- Examples of **output or performance measures** include per cent of eligible population participating in formal and informal Jewish education by age group, levels of student and parent satisfaction, drop out rates pre and post bar(bat) mitzvah, performance on tests of Jewish knowledge, etc. Methods of collecting this information include sample surveys, questionnaires to program directors, focus groups (for satisfaction), self-studies by schools, alumni surveys, data collected by a central body such as the Board of Jewish Education or Federation, and information collected in recent Jewish population studies.
- **Outcomes** are the most difficult to measure. It is useful to articulate what these might be, even if the data is not available, because it will be helpful in developing the mission statement later on as well as for suggesting lines of future research. Examples of outcome measures would be self-definition and commitment to Jewish identity, values and practices; evidence of transmission of Jewishness to the next generation; affiliation with synagogues, communal organizations, support of Israel and Jewish institutions, etc.

Benchmarks/Tasks

1. Design Needs Analysis

- Focus: Select the primary groups to study. *Questions to be studied*
- Measures: Decide on the measures for measuring the need of each group. *Personal; quality of supplementary school; Tests*
- Develop Concept Scheme: Layout decisions on design for discussion with commission. *Method; Availability of*

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

3. Estimate of community need/demand.

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

Box 8: Methods

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

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

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

Profile

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

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

participation

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

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

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

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

Box 9: Elements of an Institution or Program Profile

- **Students:**
 - . Enrollment and graduation trends
 - . Age range
- **Educators:**
 - . Numbers of full- and part-time
 - . areas of expertise.
- **Program components:**
 - . Subjects
 - . Degree(s) offered
 - . Activity duration
 - . Methods
 - . Support resources (e.g. library, training) and services
- **Finances**
 - . Cost per unit of service
 - . Revenue and expenditure trends

Deliverables

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

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

b. Personnel * c.

AMERICAN JEWISH
ARCHIVES



III. CRITICAL ISSUES

Rationale

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

Deliverables:

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

Benchmarks and Methods

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

Box 10: Sample Assumptions

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

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

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

Box 11: Classification of Issues

1. **Mission-level issues** -- i.e. choices relating to the vision, philosophy and the role of the community in initiating or supporting the emerging needs.
2. **Policy issues** -- i.e. choices relating to the broad policies relevant to carrying out the community's mission. Some of these choices relate to professional development (e.g. the balance between in-service and pre-service training for pre-school teachers); recruitment (e.g. the balance between new entrants into the field, continuing education, and re-training people from other fields).
3. **Standards and Program Issues** -- choices relating to the content and level of programming in Jewish education.
4. **Resource and organization Issues** -- i.e. choices relating to the internal capacity of the community to support mission and policies (e.g. the financial resources, agency roles, possible coordinative and integrative mechanisms).

IV. MISSION OR VISION STATEMENT

Rationale

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

Deliverable

A one paragraph to one page Mission Statement

Benchmarks and Methods

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

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

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

V. SETTING STRATEGIES AND PRIORITIES

Rationale

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

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

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

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

Deliverables

- List of policy recommendations for the improvement of Jewish education
- Recommended priority rank and desirable sequence for each recommendation
- List of criteria used to select and rank policy recommendations.

Benchmarks and Methods

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

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

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

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

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

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

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

Box 13: Sample Criteria for Selecting Strategies and Priorities

- Support professionalization of principals and teachers -- including incentives for higher levels of education.
- Encourage deeper communal involvement and support of Jewish education.
- Maximize effective utilization of resources (minimize duplication).
- Maximize the opportunity to integrate formal and informal educational techniques (e.g., family shabbatonim; camping + study programs; Israel study programs).

VI. DESIGNING PROGRAMS/PILOT PROJECTS

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

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

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

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

Pilot Projects

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

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

Box 14: Sample Criteria for Pilot Project Selection

- Improves professional status of teachers, principals, and informal educators
- Promises short-term success and visibility
- Maximizes the opportunity to replicate good results from other communities (e.g., via "Best Practices").
- Promotes multi-agency programming and cooperation cooperation
- Maximizes parental involvement
- Strengthens congregations

Box 15: Sample Ideas for Pilot Projects

Personnel

- In-service training for educational leadership -- school principals and JCC program directors.
- In-service training for 2 teachers and 2 informal educators from each institution.
- Summer seminar in Israel for selected educators

Community Mobilization

- Leadership training program for congregational and agency board members.
- A series of public forums on "best practices" and/or the community vision.

Commission Programs

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

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

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

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

Box 16: Steps in Developing Program Recommendations

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

VII. FINANCIAL RESOURCE DEVELOPMENT

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

- Annual campaign allocations for local services (either increased amounts or reallocations)
- Creation or expansion of a fund for Jewish education
- » Major donors
- Foundations (Jewish oriented, and possibly secular ones also)

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

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

1. Package most attractive program ideas

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

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

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

3. Match programs to funder interests

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

5. Follow-up, as appropriate.

VIII. PREPARE FIRST YEAR ACTION PLAN

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