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CIJE Lead Communities correspondence and planning documents. "Letter of Understanding" with Milwaukee (Wis.), 1992.

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LEAD COMMUNITIES PROJECT · Mailing Address

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October 21, 1992

#### LETTER OF UNDERSTANDING

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Dear Mr. Meyer;

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

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

The lead community is expected "to function as a local laboratory for Jewish education; to determine the educational practices and policies that work best; to redesign and improve Jewish education through a wide array of intensive programs; to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, with a high level of community support and with the necessary funding."<sup>7, 8</sup>

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

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

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

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

This letter covers the three year period from Sept 1, 1992 through August 31, 1995.

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

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

Along with the five year plan, the community will also prepare an Action Program for 1993-94 which will include the schedule of the specific improvements to be undertaken; and the costs and revenues associated with each specific improvement effort.<sup>9</sup>

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

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

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

In support of these efforts, CIJE agrees to:

- Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education, Early Childhood Education, JCC programs; Israel Experience; Day School; Campus Programs; Camping; & Adult Education. Information on all areas will be made available between October, 1992 and the end of May, 1993. The lead community will adapt and introduce these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE.
- Provide technical assistance in planning and educational development. The community will have access to assistance from a roster of experts provided by CIJE at no cost to the community.

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

- Introduce potential funders to the community -- including continental foundations interested in specific project areas.
- Negotiate with foundations, organizations, and providers of programs -- training institutions, JCCA and JESNA -- to define the nature of their involvement and their contribution to Lead Communities.
- Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.
- Convene lead community leadership for periodic meetings on common concerns.

The Lead Community agrees to:

- Establish a Lead Community Committee to direct the project. The Committee will be made up of top community leadership representing all elements of the community --Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by ......
- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -including consumers of Jewish education, (e.g. parents and students), educators, board members and Rabbis.
- Appoint a Lead Communities Planning Director to staff the Lead Communities Committee and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g. the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.
- Prepare a five-year plan, and annual action programs (as described above).
- Appoint a Lead Communities Director to direct the Action Program for 1993-94 onward.
- Integrate the findings of the Best Practices Program appropriate to the Lead Community. (as discussed above).
- Identify and begin one or more experimental programs within the first year.
- Build the profession of Jewish education, and thereby address the shortage of qualified personnel.

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- Mobilize community support to the cause of Jewish education.
- Significantly expand the communal resources committed to Jewish education. Based on one community's experience in implementing the recommendations of its Commission on Jewish Continuity, "significant expansion" should result in at least a 40% increase in communal resources for Jewish education by the third year action program. Communal resources include regular allocations, endowment funds, local foundation grants, and other sources of local funds.
- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.
- Work with CIJE to disseminate the results of their experience to other communities.

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

CIJE	Federation
Ву:	 Ву:
Title:	Title:
Date:	 Date:

#### (ILLUSTRATIVE)

# APPENDIX: TOPICS LIKELY TO BE ADDRESSED BY A LEAD COMMUNITIES PLAN

- How the community plans to approach major improvements in educational personnel (e.g., in-service education for all educators)
- What improvements are envisioned for each major setting within which Jewish education takes place: congregations and supplementary schools; JCC's, Israel experience; Day schools; and camping; higher Jewish education campuses
- How to create a more supportive climate for Jewish education
- How to approach the Jewish education of each major group in the life cycle: singles; families with young children; teens; the college years; empty nesters; older people
- How the community plans to encourage linkages (e.g., between formal and informal educational experiences)

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# SITE VISIT NOTES

# LEAD COMMUNITIES PROJECT

BOSTON

JULY 7, 1992

Visiting Team Morton Mandel Arthur Rotman Shulamith Elster Jack Ukeles

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## SITE VISIT NOTES: INTRODUCTION

These notes are to help you prepare for the site visit. If possible, read them during the weekend before the visit and review during the trip to Boston.

The notes contain: the purpose of the site visit, the agenda for the day, notes for each of the first of three meetings (including some suggested questions to raise and a list of site visit invitees) and a copy of the questions that were mailed to the community in June.

Part 2 of this package contains background material. The information is organized in four sections:

- I. List of invitees for the fourth and fifth meetings
- II. The Preliminary Proposal (including information on the community)
- III. The Lead Communities Project
- IV. CIJE Information



#### THE PURPOSE OF THE SITE VISIT

- 1. The primary purposes of this site visit are:
  - To provide CIJE with information on the <u>capacity</u> of the community to implement the requirements of the lead community.
  - To acquaint the community leadership with the CIJE, its purpose and program, and to get the local leadership's reaction to that purpose and program.
- 2. Each community is providing CIJE with considerable written information. Much of this by definition is self serving. Hopefully, the visitor to each community can "read between the lines" to test the validity and veracity of the information.
- 3. Whether the community visited ends up being a lead community or not, the visit should focus the community leadership on the work that needs to be done to insure Jewish continuity.
- 4. It is important to the overall effort to create a positive feeling about CIJE in the local community.

#### AGENDA FOR SITE VISIT

- 1 9:05am <u>Site visit team briefing</u> 10:15am
- 2 11:15am <u>Preliminary meeting</u>: includes the President and Executive of 12:00pm the Federation, and chair and professional head of the Lead Communities Committee
- 3 12:00pm Discussion with lay leaders: includes the people in the 2:00pm preliminary briefing, plus lay heads of formal and informal education agencies that would be instrumental in carrying out project
  - 2:00pm <u>Tour to visit a program site</u>: Jewish community center and 3:30pm presentation
- 4 3:30pm <u>Preliminary meeting with professional leaders</u>: includes heads of key formal and informal education agencies
- 5 4:30pm Discussion with educational leadership: includes agency heads, 6:30pm formal and informal educators, program heads, Rabbis

#### **CRITERIA FOR SELECTION LEAD COMMUNITIES**

Finalist communities should not be starting from ground zero. You will want to be comfortable that they have a basic educational infrastructure in place, and they are reaching a reasonable amount of people and spending reasonable amounts of money. Here are specific criteria you may want to keep in mind:

- Leadership:
  - Evidence of multi-agency involvement and prior collaborations
  - Commitment of the lay leadership
  - Qualifications and commitment of professionals
- Program:
  - Past record of innovation
  - Building a profession of Jewish education
  - Evidence of participation in programs
  - Imaginativeness of vision (and specific program intentions)
- Financial Resources:
  - Past expenditures on Jewish education
  - Prospects for increasing resources
- Planning:
  - Clarity on strengths and weaknesses of Jewish education in community
  - Clarity on issues, needs and priorities
  - Past commissions on Jewish education or continuity and identity

#### MEETING 1: SITE VISIT TEAM MEETING (airport)

(9:05am - 10:15am)

#### Preliminary Agenda:

- Preview site visit objectives and plan
- Review strengths and weaknesses of preliminary proposal
- Identify critical issues specific to Boston, e.g.
  - Financial resources
  - Lay leadership
  - Historical independence of key institutions
- Preview probable questions from the community leaders

## MEETING 2: PRELIMINARY BRIEFING AND BACKGROUND

(11:15am to 12:00pm)

## Invitees:

Alan Goldstei Barry Shrage Irving Belansl Mark Goldwe George Krupp Rabbi Barbara	ky itz	Chairman of the Board of Combined Jewish Philanthropies (CJP) President of CJP Co-chair of the Commission on Jewish Continuity Co-chair of the Commission on Jewish Continuity Chair of the Community Advisory Board to the Commission on Jewish Continuity er Staff Director of the Commission on Jewish Continuity
Meeting 2:		Meeting Notes A R C H I V F S
PURPOSE:	:	To help sensitize visitors to community nuances To brief local leaders as to the purpose of the visit To discuss issues that may not be appropriate for large meeting
PROCESS:	Α.	Thank them for their participation to date and for the quality of their proposal.
	B.	Briefly sketch what you hope to accomplish during the visit with specific emphasis on the next meeting.
	C.	Ask leadership to provide a brief perspective on the issues the community is facing so as to provide a context for the visitors.
	D.	Has this project been discussed by the Federation Board? Sense of their understanding and leadership support of project.
	E.	Ask the leadership to brief visitors on the real "drivers" in the local lead community process. What kind of persons are they? What are their issues? In the upcoming lay leader meeting, who are the most influential?

- F. Are there issues they wish to put forth that are best dealt with in this small group?
- G. Double check to be sure that either the Federation President or the Executive will take the lead in outlining the preliminary proposal at the next meeting.
- H. What role do they expect CIJE to play?
- I. Close by discussing the format for the next meeting.



## MEETING 3: DISCUSSION WITH LAY LEADERS

(12:00pm - 2:00pm)

## Invitees:

Alan Goldstein	Chairman of the Board of CJP
Barry Shrage	President of CJP
Irving Belansky	Co-chair of the Commission on Jewish Continuity
Mark Goldweitz	Co-chair of the Commission on Jewish Continuity
George Krupp	Chair of the Community Advisory Board to the Commission on
erenge	Jewish Continuity
Susan Calechman	Chair of the Jewish Education Subcommittee of SP&AC
Av Goldberg	Chair of the Endowment Committee of CJP
Michael Rukin	Chair of Social Planning & Allocations Committee (SP&AC)
Cynthia Shulman	Campaign Chair of CJP
Ron Silberstein	Incoming Chair of the Endowment Committee of CJP
Michael Bohnen	President of JCRC of Greater Boston; Chair of Service Delivery
	Committee of the Commission on Jewish Continuity
Martin Dropkin	President of the Bureau of Jewish Education
Andy Eisenberg	President of JCC of Greater Boston; Chair of Personnel
	Committee of the Commission on Jewish Continuity
Dr. David Gordis	Incoming President of Boston Hebrew College
Carol Killian	President of Solomon Schechter Day School, Newton
Dr. Bernard Kosowsky	Chairman of the Board of Maimonides School
Myra Kraft	President of Jewish National Fund, New England Region
Bonnie Millender	Former Co-Chair of the Task Force on Supplemental Jewish
	Education
Rabbi Paul Menitoff	Regional Director of UAHC Northeast Council
Gail Reimer	President of Rashi School
Larry Rowe	President of the Hillel Council of Metropolitan Boston
Lillian Shulman	President of the Synagogue Council of Massachusetts
Ted Teplow	Chairman of the Board of Hebrew College
Rabbi Barbara Penzner	Staff Director of the Commission on Jewish Continuity

#### Meeting 3: Meeting Notes:

#### Introductions and Appreciation

- Host introduces meeting and CIJE, and describes 2 parts to meeting:
  - Opportunity for community to learn about CIJE and Lead Communities Project
  - Opportunity for CIJE to learn more about communities
- Introductions of visiting team by Hosts or CIJE board member
- Ask for introductions of individuals around the table by current position(s), and other Jewish agencies they have been involved in.

#### About CIJE:

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- Thank community for hospitality and for their participation in major efforts to ensure Jewish continuity.
- Council for Initiatives in Jewish Education brings together distinguished educators, professionals, lay leaders and philanthropists in a continental effort to energize Jewish education.
- The mobilization of continental educational and financial resources to invest in creating Jewish educational approaches is a distinguishing feature of CIJE.
- This effort comes for a deep concern we all share about the future of the Jewish people in North America.
- One of the strategies we have decided to employ in this effort is the Lead Communities Project in which capable local communities can demonstrate effective Jewish education and thereby energize themselves, sister communities and ultimately the continent at large.
- Three or four communities will be selected as Lead Communities to demonstrate to themselves and others aspects of outstanding Jewish education projects and practice. Yours is one of nine communities (of 23) selected as a finalist for a Lead Community slot.

- Other CIJE projects that will support Lead Communities include:
  - Building a profession of Jewish Educators
  - Best Practices
  - Monitoring and evaluation
- We believe that the Lead Community Project, along with other efforts will, over the years, create the know how and the climate "to produce programs with high Jewish content that people enthusiastically want to participate in."
- In short, we see ourselves as a catalyst to help the Jewish community grow and flourish and we welcome the opportunity to work closely with Boston leadership on this key issue.

#### Purpose of this meeting:

- The purpose of today's visit and of this meeting is to get a sense of the readiness of your community to be a Lead Community.
- We are also prepared to answer questions you may have about CIJE and the Lead Community Project.

Pause - Ask for questions re CIJE Lead Communities Project or Purpose

#### Community's Proposal:

President or Executive of Federation outlines community's proposal highlighting three or four major points and what is unique about it.

#### CIJE Questions to Invitees:

- What are the perceived strengths of your community that lead you to believe that you will succeed in your undertaking?
- What are the obstacles you will have to overcome?
- There are many priority demands on our community dollars. How do you view this priority?

- What steps are you taking to expand the resources available for Jewish education?
- Why should your community be selected as a demonstration site?

#### Closing:

Thank them for their participation. It is quite obvious why Boston is one of the nine Lead Community finalists.

CIJE thanks you for being willing to become partners in this endeavor.



# QUESTIONS FOR WRITTEN RESPONSE

(sent to community at end of June)

<u>Leadership</u> :	You have described the work of the Commission on Jewish Continuity. Do you envision the Commission on Jewish Continuity or its Steering Committee as the vehicle to guide the Lead Communities Project? Or do you envision creating a successor mechanism? Or do you envision the Lead Communities Project as having a separate identity within the Commission (e.g., a separate subcommittee)?
	You have identified a (part-time) professional to work on this project; do you envision bringing in other professional resources (e.g., from the congregations, schools or agencies)? and, if so, how do you see them operating?
<u>Program</u> :	Could you describe more fully your concept of the congregation and college campus as primary educational "gateways."
	How do you envision integrating the campus program into the community-wide educational system, particularly given Boston's role as a national center for higher education drawing Jewish students from all over the continent?
	What is your view of the future role of your Board of Jewish Education?
Financial Resources:	What is your current thinking about how to expand the resources for Jewish education given the economic pressures on your community and the impact on recent campaigns? Do you envision a major new initiative for education funding (e.g. endowment); a reallocation of existing
	resources or some combination of efforts? Are there

prospects for a major philanthropic leader to set the pace?

Planning:While you are not envisioning a Final Report of your<br/>Commission until December 1992, are there emerging<br/>themes that you could share with us, even on a tentative<br/>basis? Will the Final Report present a broad vision for<br/>Jewish education or define specific improvement programs.

The Lead Communities Project envisions a planning year during which the selected communities plan together as well as separately. Does Boston envision any barriers to its *participating* in this effort? How would you like to participate?



# [CONFIDENTIAL]

# **BACKGROUND MATERIAL**

# LEAD COMMUNITIES PROJECT

BOSTON

JULY 7, 1992

Visiting Team Morton Mandel Arthur Rotman Shulamith Elster Jack Ukeles

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This background material is to help you prepare for the site visit. If possible, review it during the weekend before the visit and during the trip to Boston.

The materials cover four subjects:

- I. List of invitees (meetings 4 and 5)
- II. The Preliminary Proposal (including information on the community)
- III. The Lead Communities Project
- IV. CIJE Information
- I. Invitees
- **II. Preliminary Proposal.** As much as possible, we want to build the site visit around the preliminary proposal submitted by the community. It would be helpful if you read that proposal carefully, noting areas for follow-up on the site visit. This section also includes some basic statistical information on the community.
- III. Lead Communities Project "Rationale" that was sent to the community to review in advance of your site visit today. This section also contains a list if CIJE Board members on the Lead Communities Committee, and information on the selection process.
- IV. CIJE Information contains lists of Board members, senior policy advisors, staff and consultants, and short descriptions of CIJE purposes and projects.

# AMERICAN JEWISH A R C H I V F S

# I. INVITEES TO MEETINGS 4 & 5

### MEETING 4: PRELIMINARY MEETING WITH EDUCATION TEAM

(3:30pm - 4:30pm)

#### Invitees:

Dr. David Gordis Dr. Daniel Margolis Bernard Rosen Barry Shrage Incoming President of the Boston Hebrew College Executive Director of the Bureau of Jewish Education Executive Director of the JCC of Greater Boston President of the Combined Jewish Philanthropies



# MEETING 5: DISCUSSION WITH EDUCATIONAL LEADERSHIP

#### Invitees:

Dr. David Gordis	Incoming President of Boston Hebrew College
Dr. Daniel Margolis	Executive Director of the BJE
Bernard Rosen	Executive Director of JCC of Boston
Barry Shrage	President of CJP
Rabbi Sam Chiel	Rabbi of Temple Emanuel, Newton; CJP Board
Margie Berkowitz	Representative of Jewish Educators' Association (JEA);
8	Educational Director of Temple Israel, Sharon
Lois Edelstein	Representative of Boston Area Reform Temple Educators
2	(BARTE); Educational Director of Temple Isaiah, Lexington
Rabbi Bernard Eisenman	President of New England Region Rabbinical Assembly;
Rabbi Demard Diseminan	Rabbi of Temple Emunah, Lexington
Rabbi Josh Elkin	Headmaster of Solomon Schechter Day School, Newton
Rabbi Ronne Friedman	Co-Chair of Pre-School/Elementary Task Group;
Rabbi Ronne Theuman	Educational Director of Temple Israel, Boston
Rabbi Gershon Gerwitz	Rabbi of Young Israel, Brookline; CJP Board
Dr. Sherry Israel	Professor at the Hornstein Program, Brandeis Univ.
Carolyn Keller	Director of Family Education, BJE
Aaron Kischel	Executive Director of USCJ, New England Region
Sam Mendales	Executive Director of the Hillel Council, Metropolitan
	Boston
Rabbi Paul Menitoff	Regional Director of UAHC, Northeast Council
Jennifer Miller	Head, Rashi School
Dr. Joseph Reimer	Professor at the Hornstein Program, Brandeis Univ.
Myrna Rubel	Representative of JEA; Former Educational Director
	of Temple Emeth, Brookline
Rabbi David Shapiro	Principal, Maimonides School
Dr. Susan Shevitz	Professor at the Hornstein Program, Brandeis Univ.
Bini Silver	Representative of BARTE; Educational Director of Beth
	Shalom, Needham
Alan Teperow	Executive Director of the Synagogue Council of
1	Massachusetts
Rabbi Henry Zoob	President, Massachusetts Board of Rabbis; Rabbi,
	Temple Beth David, Westwood
Rabbi Barbara Penzner	Staff Director of the Commission on Jewish
	Continuity

# II. PRELIMINARY PROPOSAL



# 凹COMBINED JEWISH PHILANTHROPIES

OF GREATER BOSTON

ALAN R. GOLDSTEIN Chair, Board of Directors BARRY SHRAGE President

March 30, 1992

One Lincoln Plaza Boston, Massachusetts 02111 (617) 330-9500 Telefax (617) 330-5197

Morton L. Mandel, Chair Council on Initiatives in Jewish Education c/o Ukeles Associates 611 Broadway Suite 505 New York, New York 10012

Dear Mort:

Thanks for the opportunity to apply for inclusion as a lead community under the Council for Initiatives in Jewish Education. It's vital to use the energy and creativity of local communities to build on the work of the Commission on Jewish Education in North America and we believe we can make an important contribution to this process.

Boston is uniquely positioned to test the possibility of <u>large scale</u> educational change in a metropolitan size city. In essence, we propose to translate some of what we've learned in twenty years of local and national experimentation in Jewish education into broadly based institutional change. This will be done primarily through a new partnership between CJP and its system of agencies and our two primary educational "gateways" -- congregations and college campuses.

In order to implement this ambitious vision, CJP and the Synagogue Council of Massachusetts organized a Commission on Jewish Continuity. The Commission had its first meeting in January of 1990 and is expected to deliver its recommendations within the next six months.

The Commission is <u>truly</u> a "wall-to-wall" coalition of seventy federation, agency and congregational representatives and leaders. It follows up on the successful five-year collaboration of the Task Force on Supplemental Jewish Education which also developed and implemented its plans through a broad collaborative process



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Mr. Morton L. Mandel

involving CJP, its agencies and congregations. The Commission on Jewish Continuity includes representation from the Northeast Council of the Union of American Hebrew Congregations, the New England Region of the United Synagogue of Conservative Judaism, and the Orthodox community. Jewish educators have also been involved directly through the Jewish Educators Assembly (the formal organization of Conservative Movement school principals) and BARTE (Boston Area Reform Temple Educators). Twelve congregational rabbis are also directly involved as members of the Commission. The Commission includes the presidents and executives of the Jewish Community Center of Greater Boston, the Hebrew College, and the Bureau of Jewish Education, as well as key CJP planning and campaign leadership.

A joint CJP/Congregational Steering Committee of twenty members helps shape the process and the Community Advisory Board consisting of thirty major contributors and key foundations is actively working under the chairmanship of George Krupp to develop the foundation resources needed to support the recommendations of the Commission.

The Commission is co-chaired by CJP leader Mark Goldweitz and by Irving Belansky, former President of the Synagogue Council and currently President of the Northeast Council of the Union of American Hebrew Congregations. The work of the Commission has been supported by a professional working three days per week and it is anticipated that she will continue through the implementation phase and will, if we are selected, serve as lead community director.

Dr. Sherry Israel, currently a professor at Brandeis University, staffed the project throughout its first year and Rabbi Barbara Penzner now devotes all her time at CJP to this important project. Barbara reports directly to Barry Shrage, President of CJP, who also devotes about ten percent of his time to the work of the Commission.

While the work of our Commission is still incomplete, it is already clear that Boston is prepared to create a large scale test of the notion that a new partnership, including highly targeted matching funds for <u>staff</u> and for <u>training</u> can significantly strengthen the pivotal role of congregations as a spiritual/educational gateway of Jewish life. We believe this funding can leverage the significant resources <u>already</u> committed to Jewish education through

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Mr. Morton L. Mandel

March 30, 1992

these congregations and their national movements. The strategy of the Commission will also include programs aimed at strengthening the critical role that our communal agencies, particularly Hillel and the JCC, already play as gateways to Jewish life.

The task of making widespread and substantive changes in Jewish education and its institutions is an ambitious one, but crucial to the next generation of American Jews. We take the enormity of the task seriously. We are encouraged, however, by our previous successes and energized by the enthusiasm that has been generated through the significant changes which have already been instituted. True change will improve the quality of formal and informal educators, galvanize the energies of communal leadership and prove that educational innovation can permeate our grassroots educational gateways in order to strengthen the spiritual, emotional, and cultural commitment of the tens of thousands of families that pass through each year. We believe that the Boston community is poised to create true change. We hope that you will give us the chance to prove ourselves and to serve the North American Jewish world as a lead community.

Sincerely, Goldstein an R. Shra

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# The Case for Boston as a Lead Community

Boston can provide a model for other similar-sized communities to create successes in Jewish communal and educational innovation. Currently a continental leader in family education, in positive federation-congregation relations, and in high-quality Jewish and educational resources, Boston has demonstrated both its commitment to Jewish education as a priority and its ability to put its vision into practice. With the establishment and successful work of the Commission on Jewish Continuity, Boston is in an ideal position to be designated a lead community.

Having succeeded in creating a broad coalition of federation, religious movement, congregation, and agency leaders, <u>Boston has expertise to share in developing cooperation</u> and coordination among otherwise independently-minded groups in a fragmented and <u>decentralized community</u>. Boston has also benefited from staff and lay leadership with the vision, passion and willingness to take risks which has fueled these endeavors in Jewish education and communal collaboration.

<u>Boston has unique and strong ties to the national religious movements</u>. These lay and professional relationships have contributed to creating a national environment for federation-synagogue cooperation, and should greatly enhance our ability to spread successful models of cooperation across the country.

With the success of the Task Force on Supplemental Jewish Education, and the widespread acclaim for the programs which that Task Force engendered, <u>Boston has al-ready taken a major step in the direction of educational change, and has motivated all stakeholders</u> to move into the next phase of change. In family education, few other communities have acquired as much experience, devoted as many resources, involved as many agencies or congregations in extensive training programs, or conducted as much formal research as Boston.

Building on the work of the Task Force, <u>the Commission on Iewish Continuity aims to</u> <u>make changes which will affect a broad spectrum of students and their families and</u> <u>which will raise the quality of and expectations for Jewish education to a new standard</u>. With the active participation of movement and congregational leaders in the Commission and its Task Groups, we anticipate the Commission's impact will be felt by the majority of students in the area schools, and we intend to reshape the traditional image and definition of Jewish education. We expect to <u>integrate</u> family education, camping, youth groups, and Israel experiences into every student's Jewish educational experience, and to foster the interaction and cumulative effects of formal and informal education.

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While finding top Jewish educational personnel to train formal and informal educators has been a problem for other communities, <u>Boston is in a unique position to use the vast educational resources of our local universities to speed the implementation of Commission recommendations</u>. Over the years Brandeis University staff -- particularly Susan Shevitz, Joseph Reimer, and Sherry Israel of the Hornstein program and Gary Tobin and Sylvia Fishman of the Cohen Center for Modern Jewish Studies -- have been an integral part of evaluation and training efforts at the BJE and Hebrew College. Dr. Samuel Thier, the new president of Brandeis, has pledged his strong support for the Commission on Jewish Continuity. <u>The Commission has also built into the recommendations process a mechanism for monitoring and evaluation of all recommendations as they are implemented and our university base provides a perfect environment for thoughtful evaluation. Through the work of the Task Force on Supplemental Jewish Education, this community has become more sophisticated about and more accepting of the evaluation process, and has benefited from the finest resources for evaluation available in our community.</u>

By funding supplemental school initiatives, the Passport to Israel program, and maintaining allocations for day schools and existing institutions through the recession, <u>CIP</u> has already demonstrated a financial commitment to Jewish education as a priority. Through the Community Advisory Board, a committee of lay leaders committed to seeking funding for the Commission's work, and through a commitment by CIP's Social Planning & Allocations Committee to set aside significant new resources for the Commission's projects, we have already begun to develop important local funding sources. We will be seeking national foundation funding only for creating the training programs required to carry out the Commission's work. We strongly believe that immediate and ongoing funding for direct line staff and program costs must be carried by our local community.

(See "Recent and Ongoing Studies of Community Needs and Resources" for a fuller description of the preliminary goals already generated by the Commission on Jewish Continuity.)

# Recent and Ongoing Studies of Community Needs and Resources

In 1984, CJP concluded a two-year Communal Objectives study which identified six key communal issues through a broad consultative process. The committee's number one recommendation was to strengthen Jewish education, specifically focusing on supplemental schools. In response to the report, the Task Force on Supplemental Jewish Education was established in 1985 to address the needs of the Jewish supplemental schools. After a careful and comprehensive two-year process of accumulating and reviewing national and local data, the Task Force concluded that three key areas merited immediate and direct attention: recruiting, training, and retaining effective personnel: expanding the scope of family, informal and youth activities and integrating them with the formal aspects of the educational program: and developing a systematic means for evaluating program impact and gathering necessary data. The Task Force's work resulted in an investment of \$1.5 million over five years, from 1987-1992, targeted to these new foci in Jewish education as provided by the supplemental schools. This was accomplished through the cooperative efforts among CJP, the BJE, the movements, congregations and schools.

At the same time, the Social Planning and Allocations Committee (SP&AC) of CJP engaged in studies and made some shifts in the allocations process in response to perceived needs. With a commitment to raising day school funding to the national norm, beginning in 1987 funding of day schools was changed to a per capita formula. In 1990-91, SP&AC sponsored an ad hoc committee to understand better the functions and services of the BJE and Hebrew College and to develop an informed judgment for setting funding priorities for both agencies. The Hillel Council of Greater Boston engaged in a self-study in 1989, and over the past six years, four local Hillel foundations have engaged in self-studies.

Committed to tracking the Jewish community's demographic trends, <u>CIP has conducted</u> <u>comprehensive demographic studies every ten years since 1965, with plans to conduct</u> <u>another study in 1995</u>. The Boston community, unlike any other, has the ability to track trends over the course of a thirty-year period and to use this data in future research.

<u>The Commission on Jewish Continuity, which first met in January 1990, has already</u> <u>engaged in an in-depth process of assessing community needs and resources</u>. The full Commission engaged in an environmental scan of the community's resources during the course of the first year of meetings. The Commission then turned over the work of studying the needs of specific populations to three Task Groups: Pre-School and Elementary, Adolescents, and College and Young Adults. <u>Each Task Group spent a year in a</u> process of identifying the needs of their target population. setting goals and objectives. identifying strategies for meeting the goals, and developing program ideas and policy initiatives to recommend to the Commission. Having completed their reports in February 1992, the Task Groups have turned over their work to the Commission and its Steering Committee, which are currently engaged in a process of integrating the reports, reviewing priorities and developing the programs. This process will continue through December 1992.

Thus far, the following preliminary goals have been identified by the Commission:

- use communal matching funds to establish a trained family educator position in every significantly-sized congregation, day school and Jewish community center;
- use communal matching funds to establish a trained youth professional position in every significantly-sized congregation and Jewish community center;
- create a central training program for youth workers and parent and family educators;
- expand and improve the Passport to Israel program to increase the number of youngsters who participate in a trip to Israel as an integral part of their Jewish educational experience.
- focus local and national attention on a "national collective responsibility" plan for the campus Hillel foundations:
- recruit and train college students for careers in formal and informal Iewish education and;
- <u>attract young adults through "bridge" programs for integrating graduat-</u> ing college seniors into the broader Jewish community.

Over the next six months the Commission will finalize overall plans for educator recruitment, training and compensation and finalize its review of the institutional structure of Jewish education in Boston.

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## **Recent Community Initiatives in Jewish Education**

The major initiative undertaken recently in Jewish education in Boston has been the Task Force on Supplemental Jewish Education and its resulting programs, which are decribed and evaluated in Dr. Susan Shevitz's superb 70+ page research report, "What Have We Learned: The Projects of CJP's Supplemental School Task Force, 1987 - 1992, An Evaluation." Shevitz indicates that the most successful aspects of the Task Force have been:

- Family Education grants have been widely received and have generated creativity and renewed involvement among parents, educators and rabbis, but now require a commitment to training and to personnel.
- Seed money to upgrade principals to full-time educators has made Jewish education a viable career, has increased educators' professional development and involvement in community life, and has increased recognition of the educators within the schools and congregations.
- With the collaboration which resulted in the Shevitz report, the congregations and schools have become familiar with evaluation procedures and understand the expectation of evaluation for the future. As a community, we are committed to research and evaluation as necessary tools for improving Jewish education and assessing Jewish continuity.

In 1989-90, CJP introduced *Passport to Israel*, an Israel incentive savings plan which has been adopted by 18 congregations, an increase from 11 in the first year. The community is fully committed to the goal of using the Passport program to make an educational program in Israel an integral part of every youngster's Jewish education.

<u>The Hornstein Program at Brandeis</u> has begun working in the area of Family Education. Now graduating five education specialists each year, the Hornstein Program has placed several students in innovative field placements in congregations, working on family education. Graduates will be trained to lead educational institutions which integrate formal and informal education and which promote family education.

<u>Hebrew College and the BIE</u> have collaborated on developing an Early Childhood Institute, to train and support personnel in that field and to enhance the profession as a career option.

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- Hebrew College has also created several other institutes for Jewish professionals, including the popular Principals' Center, which is a model for the professional and personal growth of Jewish educators. The graduates of these institutes will participate in an Israel mission supported by communal funds.
- The BJE has developed an elaborate multi-media department which provides the community's schools with an audio-video library as well as the capacity to create video productions. The BJE's multi- tiered high school curricular materials and co-curricular inter- school programming have been highly regarded and widely disseminated nationally.

Funding for all of these initiatives has been a communal priority which has received continued and increasing support, even in difficult economic times.



# A Statistical Profile of the Boston Area Jewish Community

In 1985, CJP conducted the third in a series of demographic surveys, conducted every 10 years since 1965. Boston's Jewish community served by CJP was then 187,000. Since that time, the addition of the MetroWest Federation has brought its population to roughly 200,000.

49% of all school-age children (5-17) were enrolled in a formal school program in 1985, with a total of 65% who had had some Jewish education, and plans for an additional 18% to receive a Jewish education in the future. According to the 1989 Boston BJE census of school enrollment, 85% of all children enrolled in Jewish education in K-12 are in the 53 supplemental schools which employ 535 teachers. Enrollment in day schools, with approximately 15% of all students, continues to expand. Boston now has 8 day schools employing 215 teachers. Over 1500 students are enrolled in 44 Jewish pre-school and day care settings.

In 1985, 16% of all school-age children attended camps with some Jewish programming. 9% of all school-age children had been to Israel, while 17% of students between 15 and 17 had been to Israel. Of 11,000 high school students, 2600 are currently involved in youth groups, including denominational groups (17 Reform, 15 Conservative, and 8 Orthodox) and independent groups (3 JCC, 3 Young Judea, and 16 BBYO). Family Education grants have brought some family education programming to 69% of all students in supplemental schools and their families.

Among Boston's Jewish educational agencies with long-standing reputations, which share resources cooperatively are:

- regional offices of the Reform and Conservative movements, with roughly 49% of the affiliated population in Conservative congregations, 41% in Reform, 7% in Orthodox, and 3% in independent.
- the Hebrew College, with 131 students in the academic programs for undergraduates and graduate students; 62 students in the Early Childhood Institute, the Principals' Center, the Teachers' Institute, and Cantors' Center, combined; and 190 students in the Hebrew Ulpan and 220 in Continuing Education courses.
- the Bureau of Jewish Education, providing resources, research and development for Jewish educational needs focused on the school-age population. The BJE consults with and serves lay and professional

leadership of the Conservative, Reform, Orthodox and independent supplemental, day and nursery schools, principals and teachers.

 the JCC of Greater Boston, which sponsors 9 day care centers and nursery schools, and 2 day camps and 1 resident camp, provides adult education classes, Jewish cultural events, teen and young adult programs, and experiential activities in conjunction with congregations such as the Creative Judaica program.

One of Boston's greatest resources is its academic community. Boston hosts 7 major Hillel foundations and an estimated 36,000 - 39,000 Jewish students (in 1985). Brandeis University's undergraduate and graduate programs in Jewish Studies include the renowned Hornstein Program in Jewish Communal Service, with a concentration in Jewish Education. Harvard, Wellesley, Boston University and Tufts also offer undergraduate courses in Jewish Studies as well as graduate degrees.

Currently, CJP allocates over 2.5 million dollars, or 27.8% of the allocations total, to Jewish education directly, with an emphasis on day schools, Hillels, Supplementary Jewish Education initiatives, and including \$56,000 last year to Passport to Israel, an increase of \$21,000 over 1990-1991. In addition, camping, day care and scholarships receive over \$170,000, and the Synagogue Program Fund receives \$28,000.The JCC of Greater Boston receives an allocation of 2 million dollars.

# AMERICAN JEWISH A R C H I V E S

# III. LEAD COMMUNITIES PROJECT

# LEAD COMMUNITIES PROJECT

This section contains:

- Expectation of a Lead Community and CIJE's Role
- Rationale for Lead Communities Project
- List of Lead Community Committee Members
- Review Panel Members
- Preliminary Selection Process





### Expectations of a Lead Community and CIJE's Role

# Expectations of a Lead Community

A lead community will:

- enlist top local leadership representing all aspects of the community;
- build a community-wide coalition involving federation, congregations, educational and other institutions;
- mobilize stakeholders from all sectors of the Jewish community in improving programs;
- create programs of educational excellence;
- devise innovative programs, for example, that cross traditional boundaries of age, setting or subject area;
- commit additional financial resources to Jewish education;
- base its programs on a serious planning effort with ongoing monitoring and evaluation;
- show tangible results after several years of intense activity; and
- help other communities benefit from its successes.

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

### CIJE's Role in the Lead Communities Project

CIJE will initiate and coordinate continental supports for the benefit of each lead community. CIJE will:

- identify funders and help obtain financial support;
- offer examples of good programs and experiences through the "Best Practices
   Project," and help translate them to lead communities;
- provide professional assistance for planning and education;
- develop links to continental resource agencies (e.g., national training institutions, JESNA, JCCA, denominational movements, universities);
- develop a monitoring, evaluation and feedback system;
- provide leadership recruitment assistance; and
- convene lead communities for ongoing seminars during the project.



# Rationale for Lead Communities Project

# **Rationale for Lead Communities Project**

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

### Why a Lead Communities Project

combination of leadership, programs, resources, and planning.

#### Improving Effectiveness

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

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

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

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

More and better Jewish education programs and services;

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

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

### Programs

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

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

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

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

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

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



### **Financial Resources**

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

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

### Planning

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

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

### Lead Communities: A Continental Enterprise

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

# CIJE LEAD COMMUNITY COMMITTEE MEMBERS

Charles Ratner, Chair

Charles Bronfman

Thomas Hausdorff

David Hirschhorn

Mark Lainer

Melvin Merians

Lester Pollack

### **Review Panel Members**

### PANEL #1

Dr. Robert Abramson, Director, Department of Education, United Synagogue of America Mark Berger, West Coast Regional Director, Council of Jewish Federations Dr. Peter Geffen, Consultant, CRB Foundation; Founder, A.J. Heschel School Dr. Elliot Spack, Executive Director, Coalition for Advancement of Jewish Education

### PANEL #2

David Dubin, Executive Director, JCC of Palisades Sylvia Ettenberg, Dean Emeritus, Jewish Theological Seminary Mark Gurvis, Director of Budge and Planning, Jewish Federation of Cleveland Dr. Alvin Schiff, Former Executive Vice President, Bureau of Jewish Education, NY; Distinguished Professor of Education, Yeshiva University

### PANEL #3

Richard Joel, Executive Director, B'nai B'rith Hillel Foundation Sara Lee, Director, Rhea Hirsch School of Education, Hebrew Union College Leonard Rubin, Assistant Executive Director, JCC Association Dr. Jonathan Woocher, Executive Vice President, JESNA

### PRELIMINARY SELECTION PROCESS

Summary of the review process applied to reach of the 23 preliminary proposals.

23 communities prepared preliminary proposals in response to the CIJE Program Guidelines. These proposals, along with statistical information compiled about each community, were forwarded to an advisory group consisting of 12 experienced and distinguished educators and community professionals who assisted us in the process of identifying finalists. They read, evaluated and assigned a numerical score to each proposal, and then discussed their assessments of each community's suitability to be a lead community.

The review panelists were asked to focus on two criteria:

Is the community prepared to become a lead community?

Is the community <u>committed</u> to the importance of Jewish education?

The primary evidence upon which they based their judgements included:

■Leadership:

- Multi-agency involvement and prior collaborations
- Qualifications of prospective chair
- Qualifications of professional director
- Program:
  - Participation rates
  - Past record of innovation
  - Building a profession of Jewish education
- Financial Resources:
  - Per capita expenditures on Jewish education
  - Percentage allocation to Jewish education

- Planning:
  - Clarity on needs and priorities
  - Past commissions on Jewish education or continuity and identity
  - Proposed goals as lead community

The conclusions of the panel were converted into a composite numerical rating for each community. Their assessment of the strengths and weaknesses of each community was also recorded.

This information was given to the 8 members of the Lead Communities Committee of the CIJE Board of Directors, who discussed the applicant communities and selected 9 finalists.



# AMERICAN JEWISH A R C H I V E S

# IV. CIJE INFORMATION

# CIJE

Summary Points:

- Genesis in COJENA
- Established in Fall, 1990
- Purpose: "CIJE's role is to stimulate, to facilitate, to make things happen in Jewish education. Our objectives are (1) to get more resources to the field, not amass them in yet another umbrella organization; and (2) to bring together the best talent on the continent on behalf of Jewish education. Consequently, we have a very lean staff, and we have tapped the experience of established organizations and engaged top-notch professionals on a part-time basis to guide us in specific areas."

This section also includes: A.M.

- Board of Directors
- Staff and Consultants
- Executive Summary of "A Time to Act"
- Selected Lead Communities-Related CIJE Initiatives
  - Monitoring, evaluation, and feedback
  - Best practices

#### **CIJE Board Members**

Dr. David Arnow New York, NY

Mr. Mandell Berman Southfield, MI

Mr. Charles Bronfman Montreal, Quebec

Mr. Gerald Cohen Atlanta, GA

Mr. John Colman Glencoe, IL

Rabbi Maurice Corson Columbus, OH

Mr. Irwin Field Cerritos, CA

Mr. Max Fisher, Honorary Chair Detroit, MI

Mr. Henry Koschitzky Toronto, Ontario

Mr. Mark Lainer Encino, CA

Dr. Norman Lamm New York, NY

Mr. Norman Lipoff Miami, FL

Professor Seymour Martin Lipset Fairfax, VA

Mr. Morton Mandel, Chair Cleveland, OH

Mr. Matthew Maryles, Vice Chair New York, NY

Mrs. Florence Melton Columbus, OH Mr. Charles Goodman, Vice Chair Chicago, IL

Dr. Alfred Gottschalk Cincinnati, OH

Dr. Arthur Green Wyncote, PA

Mr. Neil Greenbaum, Vice Chair Chicago, IL

Mr. Thomas Hausdorff Paramus, NJ

Mr. David Hirschhorn Baltimore, MD

Mr. Ludwig Jesselson New York, NY

Mr. Melvin Merians Larchmont, NY

Mr. Lester Pollack, Vice Chair New York, NY

Mr. Charles Ratner Cleveland, OH

Mrs. Esther Leah Ritz Milwaukee, WI

Mr. Richard Scheuer New York, NY

Dr. Ismar Schorsch New York, NY

Rabbi Isadore Twersky Cambridge, MA

Mr. Bennett Yanowitz Cleveland, OH

# CIJE Staff and Consultants

Dr. Shulamith R. Elster CHIEF EDUCATION OFFICER Rockville, MD

Arthur Rotman STAFF Lead Communities Committee New York, NY

Professor Seymour Fox CONSULTANT The Mandel Institute for the Advanced Study and Development of Jewish Education Jerusalem

Mrs. Annette Hochstein CONSULTANT The Mandel Institute for the Advanced Study and Development of Jewish Education Jerusalem

Mrs. Virginia Levi STAFF Premier Industrial Corp. Cleveland, OH

Mr. Arthur Naperstak CONSULTANT Mandel School of Applied Social Sciences Case Western Reserve University Cleveland, OH

Mr. Henry L. Zucker CONSULTANT Cleveland, OH Mr. Stanley Horowitz CONSULTANT New York, NY

Mr. Stephen Hoffman CONSULTANT Cleveland, OH

Dr. Barry W. Holtz CONSULTANT Melton Center Jewish Theological Seminary New York, NY

Professor Adam Gamoran CONSULTANT WI Center for Educational Research Madison, WI

Dr. James Meier CONSULTANT Ukeles Associates, Inc. New York, NY

Dr. Jacob B. Ukeles CONSULTANT Ukeles Associates, Inc. New York, NY



The Report of the Commission on Jewish Education in North America

> November 1990 Heshvan 5751

Convened by the Mandel Associated Foundations, JCC Association, and JESNA in Collaboration with CJF



University Press of America Lanham•New York•London

## **EXECUTIVE SUMMARY**

The Jewish community of North America is facing a crisis of major proportions. Large numbers of Jews have lost interest in Jewish values, ideals, and behavior, and there are many who no longer believe that Judaism has a role to play in their search for personal fulfillment and communality. This has grave implications, not only for the richness of Jewish life, but for the very continuity of a large segment of the Jewish people. Over the last several decades, intermarriage between Jews and non-Jews has risen dramatically, and a major proportion of children of such marriages no longer identify themselves as Jews.

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.

The Jews of North America have built an extensive and diverse system of education that takes place in many formal and informal settings. Outstanding educators who are excellent teachers and role models for young people and adults can be found throughout North America in classrooms and community centers, on educational trips to Israel, and in summer camps. However, the system of Jewish education is plagued by many problems, and because of its inadequacies it is failing to engage the

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minds of a critical segment of the Jewish population who have no other way of experiencing the beauty and richness of Jewish life.

Careful study of the current state of Jewish education reveals that much of the system, in its various forms and settings, is beset by these problems — sporadic participation; deficiencies in educational content; an underdeveloped profession of Jewish education; inadequate community support; the absence of a research function to monitor results, allocate resources, and plan improvements.

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. It was to achieve this goal that the Commission on Jewish Education in North America was established.

After analyzing the problems, the Commission decided to focus its effort on the two building blocks upon which the entire system rests — developing the profession of Jewish education and mobilizing community support to meet the needs and goals of Jewish education. In order to secure these essential building blocks, a blueprint for the future consisting of a series of concrete steps was worked out by the Commission. The plan includes both short- and long-range elements, and implementation can begin immediately with initial funding already provided.

The core of the Commission's plan is to infuse Jewish education with a new vitality by recruiting large numbers of talented and dedicated educators. These educators need to work in a congenial environment, sustained by a Jewish community that recognizes Jewish education as the most effective means for perpetuating Jewish identity and creating a commitment to Jewish values and behavior.

The plan developed by the Commission includes the following elements:

1. Building a profession of Jewish education – By creating a North American infrastructure for recruiting and training increasing numbers of qualified personnel; expanding the faculties and facilities of training institutions; intensifying on-the-job training programs; raising salaries and benefits of educational personnel; developing new career track opportunities; and increasing the empowerment of educators.

2. Mobilizing community support – By recruiting top community leaders to the cause of Jewish education; raising Jewish education to the top of the communal agenda; creating a positive environment for effective Jewish education; and providing substantially increased funding from federations, private foundations, and other sources.

3. Establishing three to five Lead Communities – To function as local laboratories for Jewish education; to determine the educational practices and policies that work best; to redesign and improve Jewish education through a wide array of intensive programs; to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, with a high level of community support and with the necessary funding. 4. Developing a research capability – By drawing up a comprehensive research agenda for Jewish education; creating the theoretical and practical knowledge base needed to monitor results and make informed decisions; conducting ongoing studies on the state of Jewish education in general, and on the progress of each component of the Commission's plan.

5. Creating the Council for Initiatives in Jewish Education – A new entity that will operate as a catalytic agent, working mainly through the efforts of others to ensure the implementation of the Commission's plan; helping to secure necessary funding; overseeing the establishment of Lead Communities; coordinating research activities; providing a setting in which creative people, institutions, organizations, and foundations can work together to develop new undertakings in Jewish education; and helping to replicate the successful experiences in Lead Communities throughout North America.

The Commission is confident that its blueprint is realistic and feasible, and will indeed provide the foundation for a new era in Jewish education. An enormous investment of resources and energies will be required to bring this about, but the Commission is convinced that the will is there and the time to act is now.

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### LEAD COMMUNITIES RELATED CIJE INITIATIVES

### Monitoring, Evaluation, and Feedback in Lead Communities

The lead communities project is developing a monitoring, evaluation, and feedback component to document its efforts and gauge its success. Documenting the process is especially important because the effects of innovation may not be manifested for several years. We will attempt to learn whether the lead communities have succeeded in creating better structures and processes for Jewish education. Its purposes are:

1. to carry out ongoing monitoring of progress in Lead Communities, in order to assist community leaders, planners and educators in their daily work. A researcher will be commissioned and will spend much of his/her time locally, collecting and analyzing data and offering it to practitioners for their consideration. The purpose of this process is to improve and correct implementation in each lead community and between them.

2. 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 in a variety of methods. Data will be collected by the local researcher and also nationally if applicable. 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 and a data base that could serve as the basis for an ongoing assessment of the state of Jewish education in North America. This work will contribute to the publication of a periodic "state of Jewish education" report as suggested by the Commission.

3. The feedback loop: findings of monitoring and evaluation activities will be continuously channelled to local and central planning activities in order to effect 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.

The project is headed by **Dr. Adam Gamoran**, Associate Professor of Sociology and Educational Policy Studies at the University of Wisconsin-Madison.

Since 1985 Dr. Gamoran has served as principal investigator in studies conducted by the National Center on Effective Secondary Schools, the Institute for Research on Poverty and the Center on Organization and Restructuring of Schools, all located at the University of Wisconsin-Madison.

### The Best Practices Project

"Best practices" is a term used in general education to refer to programs and ideas that seem to work well. CIJE consultant Dr. Barry Holtz has developed a process to build an inventory of best practices in Jewish education which can be introduced in Lead Communities.

CIJE will know what makes success happen -- personnel, funding, etc., and how a successful program can be translated from one location to another. CIJE will analyze successful approaches in one community, noting which aspects do and do not appear transferable to another environment. The implementation of best practices will provide CIJE with an opportunity to study and document the best of Jewish education, providing the continental community with a serious data base.

The project is headed by **Dr. Barry W. Holtz**, Co-director of the Melton Research Center for Jewish Education at the Jewish Theological Seminary in New York and Associate Professor in the Department of Jewish Education.

At the Melton Center Dr. Holtz has been the educational editor of the Melton Graded Curriculum Series, supervising the writing, testing, implementation and revision of the curriculum for supplementary schools. He is an editor of <u>The Melton Journal</u>, widely considered one of the most outstanding publications in the field of Jewish education. He also has written or edited four books.





UKELES ASSOCIATES INC.

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## FACSIMILE TRANSMITTAL SHEET

	AN DATES 10- 5-92
ro: Annette llochstein	FROM: Jack Ukelos
COMPANY:	PAGES (including cover): 3
FAX #:	FAX #: (212) 260-8760

MESSAGE:

lf th	nere	is	a	problem	with	this	transmission
pleuse	call	_				at	(212) 260-8758.

PHONE No. : 12122609760

### MEMORANDUM

To: Annette Hochstein

From: Jack Ukeles

Date: October 5, 1992

Re: Lead Communities Letter of Understanding

I am writing to continue our discussion about the Letter of Understanding on Lead Communities. I had hoped to have a teleconference before Art left for Europe, but we were not able to get it together, because of chagim and individual schedules.

INDIG NAIDA

As I understand it, you and Scymour have two major concerns:

- that the draft letter does not appropriately convey the idea that the Lead Communities Project is about systemic change, it sounds like just another commission.
- 2) that the document needs to include much more of the specific content of the Lead Communities Project as envisioned in "A Time to Act" and subsequent materials.

We may have a disagreement about the nature and purpose of this document; we may also disagree about how to generate change.

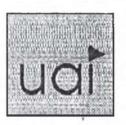
I believe that we need to do it, not talk about it. The Letter of Understanding represents talk, not talk about it. The Letter of Understanding, the more frustrated everyone will get. Our initial visits to the three communities where we talked through the draft document (but didn't give them anything in writing) reveals that:

- they now know what CIJE brings to the collaboration and what is expected of the communities.
- 3) they want to get on with it.

The only way to develop a commitment to systemic change is to work with the communities in a careful year-long educational process. That should be our goal for this year's work -- their plan should be a concrete expression of the maximum that is achievable.

I understand your anxiety given all that you and Seymour have invested in this. But I look for a little more confidence that Art, Shulamith and I share your basic vision and know what we are doing.

The real risk to this project is not the language of the letter of understanding, but the effort to broker continental resources. When one of the CIJE "fund-raisers" projected a 10% increase in local resources to Jewish education as an acceptable lead communities outcome, I was truly surprised. If CIJE had a solid plan to assemble a ten million dollar war chest, we would be in a lot better shape to pursue the agenda I believe that we share. PHONE No. : 12122608760



UKELES ASSOCIATES INC. 611 Broadway, suite 505 · New York, NY 10012 tet (212) 260-8758 · fax (212) 260-8760

# FACSIMILE TRANSMITTAL SHEET

	AN J DATE: H 10-4-97
ro: Annale Hochstein	FROM: Jun Mene-
COMPANY:	PAGES (including cover): S
FAX #:	FAX #: (212) 260-8760

MESSAGE:

lſ	there	is	ຄ	problem	with	this	transmission
pleas	se call					at	(212) 260-8758.

# MEMORANDUM

To:	Arthur Rotman
	Shulamith Elster
	Annette Hochstein
	Sol Greenfield

From:	Jim Meier		
Date:	October 5, 1992		

Re: Preliminary Outline for LC Planning Manual

Attached is a draft outline for the planning manual for Lead Communities. I look forward to your comments and reactions.



[draft 10-4-92]

### Lead Communities Planning Guide Preliminary Outline of Contents

### I. Analysis of needs

- A. Current community demographics:
  - 1. Population characteristics: cohort sizes
  - 2. Jewish educators, by category (e.g. day school principals, day school teachers, supplementary, early childhood ...)

3. Other Jewish education target group sizes (e.g., lay leaders, adult education learners, communal service professionals, college-age youth, other special groups)

- B. Present program capacities and participation rates
  - 1. Participation rates (formal and informal programs)
  - 2. Program capacities (directory of resources, enrollment capacities)

. Institutions . Programs

- 3. Estimate of community need/demand
- 4. Gaps [B3 B2]
- II. Assessment of strengths and weaknesses (What works, what doesn't work)
  - A. Areas for assessment
    - 1. Institutions and programs
    - 2. Students (levels of attainment)
    - 3. Personnel development
    - 4. Lay involvement and leadership
    - 5. Information (system capabilities)
    - 6. Coordination and collaboration within system
    - 7. Uses of technology
  - B. Exploratory comparisons (Programs and performance in other places)
- III. Strategic issues (confronting and resolving critical choices)
  - A. Identify strategic choices
  - B. Resolve strategic choices

- C. Develop community-wide mission or vision statement(s)
- IV. Establishing strategies and priorities
  - A. Formulate strategies
  - B. Establish priorities
    - 1. Population groups
    - 2. Programs
    - 3. Enabling functions/resources
- V. Designing programs (to address priorities)
  - A. Initiate program ideas or strategies/preliminary proposals
    - 1. Leadership (lay and professional)
    - 2. Institutions and human resources (including collaboration)
    - 3. Programs (including Israel trips, personnel)
    - 4. Planning and evaluation
    - 5. Financial resources
  - B. Select program priorities/phasing
- VI. Prepare implementation strategy: multi-year framework, first year action program
  - A. Program/Task
  - B. Responsibility
  - C. Cost and funding
  - D. Timetable
  - E. Performance Management
  - F. Program Evaluation
- VII. Next Steps: Implementing the plan
  - A. First-year action plan oversight
  - B. Mid-course modifications
  - C. Prepare second-year action plan
- APPENDICES

#### General format for each section

Section heading

- Rationalc: What the section is about, why it is important, how it relates to the planning process.
- Deliverables: Important junctures, or deliverables, and when they must be completed to keep the project on schedule.
- Benchmarks: Critical requirements and optional steps/tasks to achieve the benchmarks for the phase.

Methods: "How" to do the task.

Comment Box

For elaborative comments, suggestive hints, or enhancement options.

Point person(s): Recommendations on who should oversee task, and who needs to be involved or have input.

Time guidelines: Approximate minimum/maximum time to set aside to carry out task.

Examples:

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The documents which accompany this memorandum are to be discussed during the next teleconference (if not sooner), tentatively scheduled for Thursday, March 12, at 8:45 am EST, are

- Memo on the satellite broadcast and funding issues, from Jack
- Planning Tasks
- Review Process (updated version, with only minor changes)

A preliminary agenda for the call with some of the more immediate concerns is as follows:

- LC funding
  - . What to tell potential applicants
  - . CIJE 1st year funding needs (commitments, services and projects)
  - . Fundraising responsibilities

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- Planning Tasks (Plan for the Plan)
- **Review Process** 
  - Setting CIJE Board meeting on selections (it drives the process) O CRB role in Canadian city selection
  - Selection of review panelists

• Any issues on review process itself (e.g. is 2 weeks enough time for site visits, if there are 8-10 finalists?) > rate when derision call in

Miscellaneous Issues

> 0 Near term use of Senior Policy Advisors, other than as review panelists

• Staffing, orientation, and expectations of LC Committee

Some of these issues really should be settled before March 12 -- the funding questions raised in Jack's memo and the selection of the preliminary round review panelists are the most pressing. In the event that the teleconference can not be scheduled sooner, I think v e should proceed through two-way conversations.

### MEMORANLUM

ESASSOC

To:	Steve Hoffman
From:	Jack Ukeles Juch
Date:	February 28, 1992
Subjec	Followup to Satellite communication; Lead Communities, CIJE and money
CC:	hulamith Elster eymour Fox nnette Hochstein inny Levi AMERICAN JEWISH
=====	

The satellite telecommunication was in many ways a remarkable success: forty communities participated; we had expected only about 20 to 25. At least one non-participating Canadian — while city wanted to participate, but couldn't because of technical problems. (This may have affected other cities as well). Most importantly, the telecommunication caused many people in many communities to focus on Jewish education, CIJE, and the Lead Communities Project.

For me, it was truly exhilarating to hear communities check in from all sizes, all regions: from Tucson to Chicago, Tidewater to Boston. The questions were excellent and they were numerous -- twelve communities asked questions, covering about 25 topics (Marty Kraar indicated that compared very favorably with other satellite telecommunication experience CJF has had). Most exciting of all, was to hear a voice from out of the ether describing who had come together in their room for the teleconference -- the Federation, the BJE, the JCC, and in some cases the congregational network. The process itself, in a modest way, is beginning to support the creation of the kinds of coalitions we think are needed.

Since the broadcast, we have talked to 7 participants: we got a predictable range of reactions -- some people thought it was terrific; some were critical; some people's transmission was clear, others had trouble hearing or seeing. On the likelihood of applying - 1 said "yes"; 3 said "probably yes"; 2 said "maybe"; 1 said "not likely."

On one issue, there was virtual unanimity -- the issue of finance and the role of CIJE. Most people felt we were hedging; "everybody was asking the same question on money, and you were finding more creative ways not to answer them."

I don't want to overdramatize, but I believe that we need be more committal on funding questions for the project to move forward successfully to the next stage.

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I suggest that we prepare and fax an Advisory to all potential applicants along the following lines:

- Based on the Cleveland experience we expect that spending for the planning year should average about \$2 per capita; and actual program costs for year one of the action program should average about \$8 per capita.
- Assuming that smaller communities would spend more per capita (than Cleveland), and larger communities less, we would expect that the cost of a Lead Communities project would be roughly:
  - Planning process:
    - for a smaller community, \$50,000 for staffing (much of it internal) and \$5,000-10,000 for "process"
      - for a larger community, \$125,000 for staffing (much of it internal) and \$10,000-15,000 for "process"
    - Action Program (year one), program costs:
    - \$200,000 for a smaller community
    - : \$800,000 for a larger community

CIJE expects to make planning grants equivalent to 1/2 the cost of planning lead communities. [With three lead communities - 1 large, 1 small, 1 medium, this would require a war chest of \$150,000 to distribute in the planning year (1992-1993), not including the costs of running CIJE services and projects].

CIJE expects to secure foundation grants equivalent to 1/3 the cost of first year action programs. [This would require foundation commitments in the aggregate of \$500,000-700,000 for the first year of the action program, i.e. fiscal year 1993-94, not including CIJE service and project costs.]

I am fully aware that I am recommending crawling out on a limb that hasn't grown yet; after much soul-searching, I can't think of another way that will effectively move us forward.

In view of the March 31st deadline, the Advisory should go out within a week if it is to have an impact on local deliberations. I think we need to discuss this with Seymour and Annette as soon as possible, preparatory to a conversation with Mort.

2 details [planotes.03: 2-27-92] PLANNING TASKS FOR LEAD COMMUNITIES PROJECT **Due Date** Task Who Inner circle (IC) IC Teleconference on Next Steps Levi (& Hoffman) Set up date 2/28 2/28 Set agenda Elster . Financial resource plan . CIJE management plan . Review Review Process . Timetable . Chair . Composition of Panels I. Manage the Selection Process A. Satellite Teleconference aftermath . Review of tape for future uses IC 3/6 Meier . Cost to edit tape? 3/2 **B.** Preliminary Review Process **Open Issues** . Confirm CIJE exec. dir. role in chairing process Guelin V. Role of and staff liaison to LC committee Role of CRB foundation in Canada selection V. Date of CIJE Board meeting to sclect LCs Update Review Process document Meier Panelists: Elster . Develop proposed sets of panelist IC telecon . Circulate internally and approve 3/12 Elster . Finalize review schedule and line up panelists . Develop briefing outline/materials for panelists 3/20 Meier Meier/Elster etal 3/27 . Brief panelists

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[Planning Tasks, continued]	the with	Page 2
<ul> <li>Background Information</li> <li>Contact CJF, JCCA, and JESNA for city specific info.</li> <li>Set up files on each potential LC applicants</li> <li>Add to, maintain files</li> </ul>	Meier/Elster UAI office UAI office	3/4 3/6 on-going
Criteria/ratings . Develop criteria rating sheet (first draft) . Circulate criteria ratings for comments . Revise ratings, incorporating: . paper on community/leadership . paper on content . paper on personnel . Prepare for panelists	Meier IC Meier Gurvis Hochstein (Fox) Elster Meier	3/6 3/10 3/13 3/6 3/6 3/6 3/20
<ul> <li>Management</li> <li>Status report to LC board committee</li> <li>Log proposals, forward to panelists, set up panelist teleconferences, etc.</li> </ul>	Staff UAI office	4/10 Now por
Decision process . Schedule LC committee decision meeting . Outline proposed role of CRB in Canada selection . Contact CRB regarding their role C. Final Proposal Review Process	Levi UAI Hoffman	3/31 × 3/17 × 3/20 —
<ul> <li>Set CIJE board meet. target date (eg. mid-Aug)</li> <li>Schedule LC committee review/recommend meet.</li> <li>Schedule CIJE board meeting</li> <li>Rough out site visit visit/logistic plan</li> <li>Formulate preliminary roster of site visit teams</li> <li>Notify core members of site teams (e.g. prelim. panelists) of date block for visits</li> <li>Refine criteria, ratings, procedures, etc.</li> </ul>	Levi Levi Meier Elster Meier	Mid-March April April 4/3 4/7 4/10 May

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[Planning Tasks, continued]

### **II.** Plan the Planning Phase

A. Funding Plan

#### Cost Estimate

- . Identify typical LC programs and costs
- . Develop projected admin and prog. cost proposal
- Circulate proposal for IC review
- Follow-on to Mandel discussion outcomes' Jan

### Financial Resource Development Stategy

- . Suggest concept for proceeding
- . Forward to Mandel for next step w funders
- . Obtain direction from Mandel on 1st year LC funding needs

Next Steps (Funder Brokering)

- . Develop management system for tracking funder links, contacts, priorities, grants, etc.
- . Begin list of potential funders and management system information
- . Develop projections (e.g. business plan) for 1st and 2nd year resource needs, by category, by LCs and CIJE
- . Develop plan, with specific targets, contact responsibilities (staff and CIJE board), and timetables for fundraising

- Meier 3/3 Meier (Gurvis rev) 3/4 Inner circle (IC) 3/4 See "Financial Resr Dev"
- Ukeles/Meier Hoffman

Hoffman

Meier

March

May/June

June June

July August

- B. Planning Manual
- . Prepare planning manual for LC use in first year Ukeles/Meier
- . First Draft
- . Circulate for comments
  - . IC
    - . Selected external audience
- . Revisions
- Editing and production

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#### [Planning Tasks, continued]

- . Preliminary table of contents:
  - . Steps, methods, timetables, responsibilities
  - . Self study of needs and resources
  - . Vision, and objectives
  - . Strategies
    - . Programs
    - . Resource requirements (personnel, \$)
    - . Strategic approaches
  - . Implementation plans
    - . 1st year
    - . Multi-year
  - . Performance management
    - . Monitoring, evaluation and feedback
    - Replication later]
    - . Timetable
- . Training schedule and content
- C. Training/Planning Seminar

#### First year's seminars

- . Rough out plan: how many, dates, content focus UAI
- . Design first seminar for LC representatives
- . Kickoff seminar in September, to include:
  - . Planning
  - . Performance management
  - . Best Practices
  - . M.E.F.
  - . CIJE/LC contractual specifics [see below]

D. CIJE/LC contract

E. Performance Management System

- . Identify data collection set, with key indicators
  - . Items solely for use by LC
  - . Items for use by CIJE
  - . Identify "fast turnaround" elements
- . Describe analysis

June

June-Sept

May-July

UAL et al

UAI

See "III. Action Phase"

#### [Planning Tasks, continued] Page 5 . Design management reports, specifying frequency . Prepare implementation timeline, who responsible . Consult with Gamoran (see M.E.F.) . Circulate to IC for comments . Edit for insertion as chapter in "Planning Manual" F. Other CIJE Services: Links to Planning, contract 7 Leadership/Community Support Strategy . Revise paper concept/position paper Gurvis 3/6 Content Strategy Fox/Hochstein 3/6 . Concept paper Personnel Strategy Talent Bank: Design system . Construct data elements for describing experts Elster 3/10 UAI April . Develop talent bank management system Elster . Identify and line up experts (blue book) Ongoing . Set up talent bank database and credit manag. syst UAI office June . Maintain, update database and credit system ? July/ongoing . Prepare guidelines for experts on how to consult with a LC UAI September Holtz **Best Practices** Holtz . Prepare BP timetable, indicating: In Progress weld prodoubly . dates for deliverables . timing for interactions with LCs . Develop implementation/linkage procedures, training(?) Other Expert Resources Elster In progress . Role of national training institutions and univs. . Develop plan/strategy for involvement . Implement - line up commitments Elster In progress . Role of denominations . Develop plan/strategy for involvement . Implement - line up commitments Evolving Elster . Role of Senior advisors

. 10

[Planning Tasks, continued]

. Plan next structured input (meeting?)

Design Monitoring, Evaluation and Feedback Gamoran . Forward draft of preliminary data collection needs to UAI for review Gamoran April

#### **III.** Plan the Action Phase

#### A. CIJE/LC Contract

#### Issues

- . Approved by LC committee and/or CIJE Board?
- . To LCs for preliminary action prior to seminar?

UAI

UAI

Various

- . Develop model contract, to include:
  - . Goals and outcomes
  - . Standard CIJE commitments
  - . Standard LC commitments (non-negotiable)
  - . Individualized (fill-in) commitments
  - . Negotiable items
  - . Timetable
- . First draft
- . Circulate for comments
- . Revisions
- . Obtain LC committee/CIJE Board approval (?)
- . Forward to LCs for review prior to seminar
- B. First year planning process

### CIJE role/support in:

- . Coalition/planning committee
- . Performance management
- . Planning/priority setting
- . Liaison with LC executive
- . Programs (Best Practices)
- . Technical assistance

late June June-July July August August 1 1

[Planning Tasks, continued]

Page 7

. etc.

C. Roles and responsibilities

Work out roles, interventions, support etc. by CIJE planning consultants

- . ... of each LC
  - . ... of CIJE
  - . Enumeration of other resources

### IV. LC Project Management

Overall Workplan for Lead Communities

Organization and Management (Reporting) System

Organize LC Committee (Of CIJE board)

- . Establish
- . Define long term role

Mandel/Chair

?

done

#### DRAFT: February 28, 1992

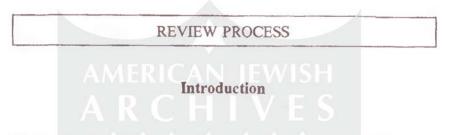
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#### FOR INTERNAL USE ONLY

#### LEAD COMMUNITIES

#### A Project of the

#### Council on Initiatives in Jewish Education



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

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

Lead community selections will be announced by August 21, 1992. With the release of the guidelines by January 31, the entire process will cover 6 1/2 to 7 months.

The process allows:

- 8 weeks for applicants to prepare preliminary proposals
- 8 weeks for finalists to prepare final proposals
- 5 weeks for preliminary proposal review and decisions
- 6-7 weeks for finalist review and decisions

### **Release of Guidelines and Preliminary Proposal Preparations**

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What	Who	When (End date)	How Long
J. Guidelines for proposals released	CIJE staff/consults	Jan 31 (Fri)	
2. Satellite teleconference	CJF Satellite network	Feb 24 (Mon)	2 hours
3. Review panel members selected and briefed	CIJE staff/consults	March 9 (Mon)	
4. Review schedule finalized: panelist, LC committee members CIJE Board members notified	CIJE staff/consults and panelists	March 13 (Fri)	
5. Preliminary Proposals due R	LC Applicants	March 31 (Tues)	8 wks

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#### NOTES AND ASSUMPTIONS:

- Assumes between 15 and 20 respondents to RFP.
- Each of 3 panels will read 8 to 12 proposals.
- Each panel includes 4-5 people:
  - · 2 educators
  - 1-2 communal professional/planner/national organizations

CIJE staff: Elster and Meier - 1BU

CIJE pre-appoints chair of each panel.

- CIJE executive director chairs overall review process.
- Each panel confers and develops recommendations during single teleconference.

• CIJE staff and consultants consolidate recommendation for lead community committee of CIJE Board.

What S	Who	When (End date)	How Long (wks)
1. Mail proposals to reviewers	CIJE staff/consults	April 6 (Mon)	Overnight
2. Checklist review • Notify communities of gaps	CIJE staff/consults	April 7 (Tue)	1 week
3. Brief written status report mailed to LC committee of CIJE Board	CIJE staff/consults	April 10 (Fri)	
4. Panel members complete reading of proposals	Panelists	April 13 (Mon)	1 week

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What	Who	When (End date)	How Long (wks)
<ul> <li>5. Members forward by fax score sheets/comments to CIJE for compilation. Includes:</li> <li>Recommendeds, ranked with concerns/issues</li> <li>Rejects (with reasons)</li> </ul>	Panelists	April 13 (Mon)	
6. CIJE compiles score sheets /comments.	CIJE staff/consults	April 14 (Tues)	1 day
7. Teleconferences w/each of 3 panel AME	CIJE/panel RICAN JEW	April 14 & 15	2 hours/each
NOTE:	Pesach April 18-25	(Sat - Sat)	
8. CIJE staff ranks proposals and forwards recommendations to LC committee of CIJE Bd	CIJE staff/consults	April 22 (Wed)	1 week Overnight
9. LC committee meets and makes decisions on finalists	LC committee (Team leaders attend as resource)	April 29 (Wed)	
10. Announcements of finalists	CIJE staff/consults	May 5 (Tues)	

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### **Final Proposal Preparation**

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What	Who	When (End date)	How Long (wks)
<ol> <li>Notification forwarded to each finalist (by phone, follow up with letter)</li> </ol>	CIJE staff/consults	May 5 (Tues)	
Rejection letter to others.		May 6 (Wed)	
Cite specific gaps, issues, concerns; forward to each finalist	CIJE staff/consults	May 14 (Thurs)	
NOTE	: Shevuot June 7-8 (	Sun - Mon) E	
2. Site visit evaluation teams organized & scheduled	CIJE staff	June 18 (Wed)	
3. Final proposals due	LC finalists	June 30 (Tues)	8 weeks

#### **Final Proposal Review**

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#### NOTES:

 Members of review panels for preliminary proposals will serve as core members of site visit teams to lead communities finalists.

Mix and match teams for finalist site visits; site visit evaluators as a rule will visit 2 or 3 sites. Each site evaluation team includes 3 people. At an average of 2 to 3 sites/person means 10-12 people. A CIJE staff person/consultant will serve on each team. CIJE appoints team chair.

Others may be added based on specific characteristics or claims of individual finalists.

QUESTION: Is there a site visit to every finalist community?

What	A R	Who	When (End date)	How Long (wks)
A. Proposal Review				
<ol> <li>Checklist review         <ul> <li>Identify gaps, concerns, issueries, issu</li></ul></li></ol>		CIJE staff	July 7 (Tues)	1/2 week
2. Mail proposals with CIJE comments to si evaluation teams	te	Mailed by CIJE staff	July 7	Overnight
Site visit protocol included with packet		Core panelists read all materials;		
		Other site evaluators review for their sites		
3. Teleconference prior site visit. Site visits begin.	to	Each site visit team	July 14 (Tues)	1 week

#### NOTE: Shiva Asar B'Tammez July 19 (Sun)

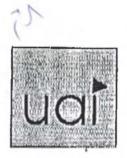
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What	Who	When (End date)	How Long (wks)
B. Site Visits			
4. Visits to LC finalist sites completed	Evaluation teams	July 24 (Fri)	2 days/each 2 weeks for all
5. Prepare site visit reports (Mostly checklist format) with recommendation	Team Leader	July 27 (Mon)	End of visit
C. Deliberations/Decisions			
<ul> <li>6. Core panel review, at CIJE offices <ul> <li>Recommendeds, ranked with concerns/issues</li> <li>Rejects (with reasons)</li> </ul> </li> </ul>	Core panel, CIJE staff/consults	Aug 3-4 (Mon-Tues) ISH E S	(2 day review meeting)
7. CIJE compiles recommendations /comments, and forwards to CIJE board	CIJE staff/consults	Aug 6 (Thurs)	Overnight
NOTE	E: Tisha B'Av Aug	9 (Sun)	
8. LC committee meets to review recommendations	LC committee	Aug 11 (Tues)	
9. Recommendation package forwarded to CIJE Board	CIJE staff/consults	Aug 13 (Thurs)	
10. CIJE Board makes final decisions	CIJE board	Aug 19 (Wed)	
11. Announcements/award notifications	CIJE staff/consults	Aug 21 (Fri)	

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# FACSIMILE TRANSMITTAL SHEET

	DATE: 9.25-92
ro: Annette Huchstein CH	FROM: Jack Okelas
COMPANY:	PAGES (including cover): $Q_{i}$
FAX #:	FAN #: (212) 260 8760

MESSAGE:

15 0	here	is	8	problem	with	this	transmission
please	call					at	(2.12) 260-8758.

#### (ILLUSTRATIVE)

# APPENDIX: TOPICS LIKELY TO BE ADDRESSED BY A LEAD COMMUNITIES PLAN

- How the community plans to approach major improvements in educational personnel (e.g., in-service education for all educators)
- What improvements are envisioned for each major setting within which Jewish education takes place: congregations and supplementary schools; JCC's, Israel experience; Day schools; and camping; higher Jewish education campuses
- How to create a more supportive climate for Jewish education
  - How to approach the Jewish education of each major group in the life cycle: singles; families with young children; teens; the college years; empty nesters; older people
    - How the community plans to encourage linkages (e.g between formal and informal educational experiences)



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## FACSIMILE TRANSMITTAL SHEET

AMERICA	DATE: 9-23-92
ro: Shulamith Elsler C + Annette Hochstein	FROM: Slack Ukeles
COMPANY: CIJE	PAGES (including cover): 6
FAX #:	FAX #: (212) 260-8760

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p	lcas	ic	call	-				at	(212) 260-8758.

<u>Draft</u> 9/23/92

### LETTER OF UNDERSTANDING

diam'r

16166000100

Dear \_\_\_\_\_,

1 am writing to confirm that the Jewish Community of \_\_\_\_\_ [Atlanta, Baltimorc, Milwaukee] and the Council for Initiatives in Jewish Education [CIJE] have agreed to participate in a joint local-continental collaboration for excellence in Jewish education, called the Lead Communities Project.

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

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

This letter is a summary of the discussions held on \_\_\_\_\_, 1992 between the Council for Initiatives on Jewish Education (CIJE), and the \_\_\_\_\_\_ [Atlanta; Baltimore, Milwaukee] Jewish Federation. Its purpose is to clarify our mutual expectations with regard to the implementation of the Lead Communities Project in \_\_\_\_\_ [Atlanta, Baltimore, Milwaukee].

<sup>&</sup>lt;sup>1</sup> A Time to Act (University Press of America, Lanham, Md., 1990), p. 17; see also pp. 67 - 69.

<sup>&</sup>lt;sup>2</sup> See also Lead Communities: Program Guidelines (January, 1992) pp. 7-11.

This letter covers the three year period from Sept 1, 1992 through August 31, 1995.

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

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

Along with the five year plan, the community will also prepare an Action Program for 1993-94 which will include the schedule of the specific improvements to be undertaken; and the costs and revenues associated with each specific improvement effort.<sup>3</sup>

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

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

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

In support of these efforts, CIJE agrees to:

- Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education, Early Childhood Education, JCC programs; Israel Experience; Day School; Campus Programs; Camping; & Adult Education. Information on all areas will be made available between October, 1992 and the end of May, 1993. The lead community will adapt and introduce these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE.
- Provide technical assistance in planning and educational development. The community will have access to assistance from a roster of experts provided by CIJE at no cost to the community.

<sup>&</sup>lt;sup>3</sup> See Appendix A for a brief description of some of the possible areas of content of a Lead Communities Plan.

- Introduce potential funders to the community -- including continental foundations interested in specific project areas.
- Negotiate with foundations, organizations, and providers of programs -- training institutions, JCCA and JESNA -- to define the nature of their involvement and their contribution to Lead Communities.
- Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.
- Convene lead community leadership for periodic meetings on common concerns.

The Lead Community agrees to:

- Establish a Lead Community Committee to direct the project. The Committee will be made up of top community leadership representing all elements of the community --Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by \_\_\_\_\_\_.
- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -including consumers of Jewish education, (e.g. parents and students), educators, board members and Rabbis.
- Appoint a Lead Communities Planning Director to staff the Lead Communities Committee and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g., the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.
- Appoint a Lead Communities Director to direct the Action Program for 1993-94 onward.
- Integrate the findings of the Best Practices Program appropriate to the Lead Community. (as discussed above).
- Identify and begin one or more experimental programs in 1993.

- Significantly expand the communal resources committed to Jewish education.<sup>4</sup> The community will work with CIJE to establish an appropriate target for expenditure for Jewish education.
- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.
- Prepare a 5 year plan, and annual action programs, as described above.
- Work with CIJE to disseminate the results of their experience to other communities.

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

CIJE	Federation
Ву:	By:
Title: Date:	Title: Date:

<sup>&</sup>lt;sup>4</sup> While it is premature to quantify significant expansion at this point, one community that seriously implemented the results of its commission on Jewish continuity increased its commitment by \_\_\_\_\_% over three years. [use Cleveland data].

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#### (ILLUSTRATIVE)

# APPENDIX: TOPICS LIKELY TO BE ADDRESSED BY A LEAD COMMUNITIES PLAN

- How the community plans to approach major improvements in educational personnel
- What improvements are envisioned for each major setting within which Jewish education takes place: congregations and supplementary schools; JCC's, Israel experience; Day schools; and camping; higher Jewish education campuses
- . How to create a more supportive climate for Jewish education
- How to approach the Jewish education of each major group in the life cycle: singles; families with young children; teens; the college years; empty nesters; older people
- How the community plans to encourage linkages (e.g between formal and informal educational experiences)



M E M O R A N D U M

To: Annette Hochstein

From: Jack Ukeles Date: August 14, 1992

- 1 I enclose two copies of the material for the Lead Communities Committee. We must mail on Monday; if you have a chance to look at it on Sunday, and have any suggestions, please call me in the office.
- 2 I had a few more thoughts after our conversation last week:

I was not happy that we were again in a situation where Mort would believe that we are seeking to increase our payment beyond what was agreed to. My first instinct was to suggest that you drop the issue of partial payment for our work in August. But upon further reflection, I realized that would not be fair:

Since this is the first time through a complex and evolving process, it should be no surprise that our estimates are sometimes not on target. For example, no one had really given much thought as to how we would assemble the views of the different site visitors. When Mort suggested (in Boston) that I should interview everybody, it made sense, and I agreed even though it meant additional work.

I probably didn't give enough attention to the impact of resignation of Steve Hoffman on our need to function as the central office administering the Lead Communities project. UAI filled the vacuum because we cared about the project and our failure to step in would have had drastic consequences, because we had the capacity to do so, and because ours was the public address that communities knew to contact. For example, in May we added a half-time clerical person to the staff. She has been spending about half of her time on CIJE work. This was never anticipated, nor included in any of our estimates of cost.

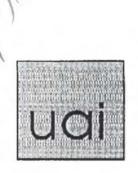
I am looking forward to seeing you on Monday.

From : Ukeles Associates Inc.

PHONE No. : 12122608760

Aug.05 1992 5:51PM P01

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

### FACSIMILE TRANSMITTAL SHEET

50	AMERICAN	DATE:	August 5, 1992
то:	ANNETTE HOCHSTEIN	FROM:	JACK UKELES
COMPANY: MANDEL INSTITUTE		PAGES (including cover): 4	
FAX #:		FAX #: (212) 260-8760	

MESSAGE: Please disregard previous fax - it contained marithmetic error.

If there is a problem with this transmission

please call \_\_\_\_\_\_ at (212) 260-8758.