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CIJE Lead Communities correspondence and planning
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COMMUNITY: BALTIMORE

JEWISH POPULATION: 92,000

SUMMARY STATEMENT: Baltimore presents itself as an ideal community because of its record of commitment to Jewish Education. THE ASSOCIATED's Commission on Jewish Education has been actively involved in formulating a comprehensive strategic plan for the City since 1990 and with the establishment of a Fund for Jewish Education in 1991 to supplement the annual campaign, Baltimore has made a concrete step forward in its efforts to improve and expand educational services.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Approximately 80% of Baltimore's youth in the 6-12 age group and 37% of youth in the 13-17 age group are currently receiving some form of Jewish schooling. In the past year alone, the City witnessed a 10% growth rate in pupil enrollment. Opportunities for children and adults include day schools, a Judaic Academy offering intensive programs for post Bar and Bat Mitzvah students, and a local Hebrew University offering graduate, undergraduate and Continuing Adult Education Programs.

LEADERSHIP AND PLANNING: The Associated Jewish Community Federation of Baltimore established a Commission on Jewish Education in 1990 in direct response to a mandate in the community's strategic plan. By the Fall of 1992, the City anticipates that it will have completed a comprehensive plan which will address the needs in the four priority areas: Jewish Day School Education, Congregational and Communal Religious School Education, Higher Jewish Education, and informal Jewish Education.

Chair: LeRoy Hoffberger
Staff: (not addressed)

COMMUNITY: ATLANTA JEWISH POPULATION:

SUMMARY STATEMENT: Atlanta's proposal highlights the dramatic growth undergone by the city's Jewish community over the last few decades. It points out that the funds available to the Federation have also increased significantly. Whereas other large cities community campaigns had an average growth rate of 2.9% between 1988 and 1990, Atlanta's rate was 13.7%. Federation Endowment Funds grew by 78.1% during that same period. The city aspires to be a regional center for Jewish activities.

CURRENT STATUS OF EDUCATION PROGRAMS: Atlanta currently supports a full roster of formal and informal activities, including day schools, supplementary schools and high schools and a range of formal and informal activities for youth and adults.

LEADERSHIP AND PLANNING: The Council for Jewish Continuity (established 1992) follows up on the work of the Year 2000 Community Services Task Force which commissioned a formal study of Jewish education in 1990. In addition, Atlanta has more recently employed Jewish education experts Dr. Chaim Peri and Dr. Adrienne Bank as consultants in its planning process. Atlanta has formally articulated several goals, including establishing a new agency dedicated to the training and support of educators and educational institutions, a new endowment fund specifically for new education programs, and the creation of a Jewish Heritage Center housing a Holocaust Center, library, archives, and teacher resource center.

Chair: William Schatten, M.D. past President of Atlanta Jewish Federation

Staff: Professional staff to be hired

COMMUNITY: MILWAUKEE

JEWISH POPULATION: 28,100

SUMMARY STATEMENT: Milwaukee continues to demonstrate its commitment to Jewish education through its generous funding of educational activities. Milwaukee ranks number one among all Group II cities. It has a record of participation in innovative national and international programs. The community has a proven record in the areas of interdenominational cooperation and cost savings with a single facility housing both an Orthodox and a community day school.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Milwaukee supports a full range of formal and informal educational activities. The City enjoys one of the highest day school enrollment rates in the country.

LEADERSHIP AND PLANNING: Milwaukee's history of assessment and planning dates to before 1981 with the completion of an extensive study of education needs and services. The community implemented an number of major initiatives in the decade which followed and is now poised to confront another set of articulated goals set forth by its Task Force on Jewish Education (est. Jan 1991). The Task Force's primary aims are the extension of Jewish learning beyond the Bar/Bat Mitzvah age group, the reduction of financial barriers which limit participation in Jewish education, and increased recruitment, training and retention of qualified education personnel.

Chair: Stephen Richman, Vice President Milwaukee Jewish Federation and Agency Relations Chairperson

Staff: With additional funding Lead Community Director is proposed

FINANCIAL RESOURCES: Milwaukee has been seriously effected by changing demographics and reduced Campaign achievement.

COMMUNITY: OTTAWA

JEWISH POPULATION: 15,000

SUMMARY STATEMENT: Ottawa proposes to serve as a model for the smaller, fast growing Jewish communities. With large numbers of newcomers arriving from areas with larger Jewish populations and consequently greater educational opportunities, the City is committed to meeting the needs of this new segment of the population and to integrating the established components of Jewish education into a plan for the future.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Among the many educational opportunities in Ottawa are: day care, day schools, afternoon schools, a Torah institute, an evening high school, and an innovative public/private high school, Aniel, that is a model for similar programs. The community also supports camps, university programming, and a variety of Israel experiences. In addition to providing services to small communities in the vicinity, Ottawa's commitment to Jewish education is reflected in its scholarship policy which provides funds so that no Jewish child is denied an education for financial reasons.

LEADERSHIP AND PLANNING: Ottawa has utilized three studies of community needs in the formulation of education policy - a long range planning study conducted in the mid 1980s, an attitudinal survey done in 1987, and a "special needs" study of its community day school. Leadership for the Lead Communities Project would be provided by a committee working under the City's Jewish Community Council. Specific articulated goals include: a full service day high school with an Israel semester, expansion of the Israel program, continuing education courses at area universities, and programs to enrich family education for parents of students in Jewish schools.

Chair: Dr. Maureen Mott, President, Jewish Community Council of Ottawa

Staff: Garry Koffman, Executive Director, Community Council in conjunction with senior staff

COMMUNITY: PALM BEACHES

JEWISH POPULATION: 76,125

SUMMARY STATEMENT: In response to a 1987 demographic study which revealed that only 20% of Jews in the area identified with the organized community, the Palm Beaches began to improve and expand educational opportunities in the community. This experience in broad-based planning and program implementation combined with demographics similar to many other communities (sun-belt; new; emerging institutions; a disproportionately adult population; absence of local Jewish academics) - is the basis for the community's case for the Palm Beaches as an unparalleled opportunity for the CIJE to participate in the building of a model of Jewish educational excellence. Priorities focus on leadership development, adult and family/intergenerational education, the pre and post Bar/Bat Mitzvah experience, and developing effective approaches to engage uninvolved Jews.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: The Palm Beaches provide a range of formal and informal educational programs for children and adults, as well as a Jewish Community Campus.

LEADERSHIP AND PLANNING: The community has been engaged in educational planning since the creation in 1987 of a Task Force on Jewish Education. Responsibility for implementing the recommendations of that Task Force was assigned to the Commission for Jewish Education (est. Sept. 1990). A Lead Community Committee will be formed within the purview of this Commission. Goals for the project have been articulated.

Chair: (not addressed)

Staff: Barbara Steinberg, Executive Director of the Commission for Jewish Education

FINANCIAL RESOURCES: The proposal notes that the Palm Beaches has a history of strong financial support for Jewish education.

COMMUNITY: RHODE ISLAND

JEWISH POPULATION: 22,000 (including surrounding areas)

SUMMARY STATEMENT: Rhode Island's qualifications for the Lead Communities Project include the high degree of cooperation exhibited by agencies and institutions in the community, the commitment to Jewish continuity displayed by its Bureau of Jewish Education, and the progressive nature of that Bureau -- which has long recognized the importance of the entire range of Jewish educational programming. Although Rhode Island does not have its own Jewish teacher training institution, the community has been active in this area. In addition, the resources of Brown University's nationally recognized Judaic studies department are available to the community.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Rhode Island supports a broad range of education activities and services and is actively involved in implementing new initiatives to meet the needs of the community.

LEADERSHIP AND PLANNING: Rhode Island's Jewish education needs have been addressed in two recent studies -- a "Demographic Study Planning and Utilization Committee Report," issued in July of 1989 and a long range planning document, "Facing the 90's," published by the Bureau of Jewish Education after a two year period of research and planning. The two documents reported similar findings and gave similar recommendations in seven areas: advocacy, general services, school services, recruitment and retention of educators, adult education, family education and development. The professional leadership of the Lead Communities Project will be provided by the Bureau of Jewish Education.

Chair: (not addressed)

Staff: (not addressed)

COMMUNITY: ROCHESTER **

JEWISH POPULATION: 23,000

SUMMARY STATEMENT: Rochester is currently in the midst of a comprehensive community-sponsored education study. Education is already the chief planning priority of the City and because a broad-based coalition has already been forged to support the work of the study in process. While not wishing to prejudge the outcomes of its study,, Rochester anticipates that areas of interest will include: personnel; expanding Israel opportunities for youth; enhancing early childhood education options; designing new models of family education and parallel youth/parent learning opportunities; and developing new gateways to Jewish learning for young families.

CURRENT STATUS OF EDUCATION PROGRAMS: Rochester supports a range of formal and informal education programs. New initiatives in Jewish education originate from a number of sources, including the Board of Jewish Education and the Jewish Family Service.

LEADERSHIP AND PLANNING: Rochester is now conducting a massive community initiated study of Jewish education. Educational institutions and programs were evaluated in a 1976 needs assessment. Project goals have not been specified, however, areas of interest in Jewish education have been articulated.

Chair: (not addressed)

Staff: Eleanor Lewin is the chair of the study in process.

COMMUNITY: SAN DIEGO

JEWISH POPULATION: 75,000

SUMMARY STATEMENT: San Diego is an emerging community, with a rapidly growing Jewish population typical of Sunbelt cities (23% seniors). The proposal notes that the area's Jewish community is more diverse than most communities, with significant numbers of South African, Mexican, Soviet, South American, Iranian and Israeli Jews settling in its environs. Although San Diego has built a strong educational and communal infrastructure, it lacks cohesiveness (the synagogue affiliation rate is estimated at 25%) and strong Jewish identification. The community is actively engaged in reversing these trends and looks to the Lead Community Project for national expertise and financial support.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: San Diego has a strong central agency for Jewish education and a wide range of formal and informal programs.

LEADERSHIP AND PLANNING: In 1988, San Diego's Federation undertook a year-long intensive priority setting exercise with the following areas identified as fundamental: emigre resettlement, in-home care for the elderly, day school education, and outreach toward un- or marginally affiliated Jews. At present, the community is forming a Task Force on Jewish Continuity with four areas of responsibility delineated. Additional studies on Jewish education have been conducted.

Chair: Gloria Stone, Federation Vice President for Long Range Planning

Staff: Job description prepared for professional to staff Task Force

COMMUNITY: SOUTH PALM BEACH COUNTY

JEWISH POPULATION: 98,000

SUMMARY STATEMENT: As a Lead Community, South Palm Beach County would use its Jewish Community Campus as a focal point for activities, the community points to the creation of this campus as tangible evidence of the area's cooperative spirit and commitment to education. While the federation is only twelve years old, funds sufficient to build a campus with two schools, as well as cultural, health and social service facilities for the entire community were raised.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: South Palm Beach County supports a wide range of formal and informal education activities. The Federation guarantees a Jewish education to any child who requests it and provides subsidies to participants in recognized youth Israel trips.

LEADERSHIP AND PLANNING: A Lead Community Committee has been selected.

Chair: Barry Podolsky, former executive director of a JCC, chairman designate Jewish Education Committee of the Federation

Staff: Full time professional would be designated

COMMUNITY: SUFFOLK COUNTY, NEW YORK

JEWISH POPULATION: 98,000

SUMMARY STATEMENT: The UJA-Federation of Greater New York recommends Suffolk County as a candidate for the Lead Communities Project as it sees the region (and the problems confronting its Jewish community) as more closely resembling the rest of the country. A significantly lower percentage of Jews in Suffolk, as compared to the other seven counties in UJA-Federation's service area, attend synagogue regularly, or participate in other activities associated with strong Jewish identification. The County, however, enjoys the care and attention of the Greater New York Federation, as well as the commitment of professional and lay leaders in Suffolk to revitalizing Jewish life in the area.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Suffolk County is home to a wide range of educational programs and related services. In the last decade, leaders have managed to turn weaknesses -- such as an inability to attract supplemental school teachers -- into strong assets -- like the Morasha Teacher Training Program, which trains lay leaders to become teachers.

LEADERSHIP AND PLANNING: In addition to numerous other evaluations, Suffolk County is currently involved in strategic planning conducted by the Greater New York UJA-Federation. Dr. David Schluker of JESNA has been engaged to assess the needs for central educational services. A two-stage process consisting of an initial planning phase followed by a period of final planning and implementation has been delineated, with guiding principles and seven specific objectives identified.

Chair: Lynn Korda Krull, Chair of the Strategic Planning Committee Subcommittee on the Continuity of the Jewish Community

Staff: Dr. David Schluker, JESNA, and other UJA and BJE representatives Suffolk based Director to be hired

COMMUNITY: TORONTO

JEWISH POPULATION: 140,000

SUMMARY STATEMENT: Toronto points to its excellent and diverse system of day schools and highly successful UJA campaigns as tangible evidence of the City's commitment to Jewish identity and continuity. Yet, Toronto's communal leaders remain concerned about the significant proportion of area youth who do not receive an extended and intensive Jewish educational experience. Initiatives under consideration include: strengthening the Federation's links with community institutions especially synagogues, enhancement and better coordination of Jewish education outside days schools, and family life education approaches. Toronto hopes to benefit from CIJE's expertise and involvement to keep momentum building and to mobilize broader lay support for these initiatives.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Toronto supports an extensive range of formal and informal education programs for youth and adults. An estimated 90% of all youth receive some type of formal Jewish education at a point in their lives.

LEADERSHIP AND PLANNING: Toronto's Federation and Board of Jewish Education have undertaken several studies related to Jewish education in recent years. The proposal lists nine, including evaluations of day and supplemental schools, and community attitudinal studies. A Commission on Jewish Education is now at work with several approaches under consideration. A standing committee would be selected if Toronto is chosen as a finalist in the Lead Communities Project.

Chair: (not addressed)

Staff: (not addressed)

COMMUNITY: VANCOUVER

JEWISH POPULATION: 20,000

SUMMARY STATEMENT: Having just completed a major study on the state of Jewish education in the community, Vancouver's communal leadership is well aware of the need to expand and improve opportunities for all ages. Implementation of recommendations evolving out of the education study has begun, with the community also undertaking a priority setting exercise which will involve all Federation constituent agencies. As these two projects come together, Vancouver is poised for a major educational initiative. A comprehensive effort is particularly appropriate for Vancouver as the City has the highest rate of intermarried households in Canada -- 36% -- and has come to be regarded by Canadian Jewry as the city to come to in order to hide from one's background.

CURRENT STATE OF EDUCATIONAL PROGRAMS: Vancouver supports a full range of formal and informal programs for children and adults. Although 20% of the area's Jewish population is below the age of 15 (4,000), only one-third are currently enrolled in any form of Jewish education, day or supplementary.

LEADERSHIP AND PLANNING: As stated above, Vancouver has just completed a year long survey of the state of Jewish education conducted by a Task Force on Jewish Education. Of the five areas studied, leadership believes three to be appropriate to the concept of a Lead Community -- teacher professional development, the formation of a Coordinating Council for Adult Education, and the creation of a central service agency to act as a model and resource for local schools.

Chair: Steering Committee designated

Staff: Director would be appointed

COMMUNITY: WASHINGTON D.C.

JEWISH POPULATION:

SUMMARY STATEMENT: Washington points to ten indicators, including its history of promoting, funding and developing high quality educational approaches, its tradition of organized professional and lay cooperation, and the existence of ongoing planning initiatives, as ample evidence of its commitment to a communal vision. The community has also defined several principles which will guide its approach to the Lead Communities Project. These principles are, in part, designed to ensure that innovations and new partnerships growing out of the project will be continued in Greater Washington, as well as in areas replicated Washington's models, after the formal CUE partnership ends.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: The Greater Washington community has an extensive and extremely wide variety of educational agencies and programs.

LEADERSHIP AND PLANNING: Washington proposes that its approach be viewed as both a continuation and culmination of multi-year community assessments, educational surveys, and organizational refinements. Leadership for the Lead Community Project has been designation and guiding principles articulated.

Chair: Phyllis Margolis, Chair Federation Resettlement Committee and Endowment Fund's Grant Committee

Staff: Robert Hyler, Director Budget and Planning, UJA FEd.
Chaim Lauer, Exec Director, Board of Jewish Education
Elaine Mann, Assistant Director, JCC of Greater Washington
Rabbi Jeffrey Wohlberg, President, Washington Board of Rabbis

COMMUNITY: WINNIPEG

JEWISH POPULATION: 15,350

SUMMARY STATEMENT: Since the mid 1980's, Winnipeg's Jewish community has been engaged in a planning process which recognizes the need for change and continuous self-evaluation. The commitment to build a new Jewish Community Campus following a multi-disciplinary model is indicative not only of Winnipeg's ability to forge forward-looking partnerships within the Jewish community, but also of the City's ability to raise the funds necessary to support Jewish education. Winnipeg's proposal includes a number of proposed and realized initiatives which incorporate the use of new technologies such as computers and satellite link-up for networking with other communities.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Winnipeg's array of Jewish education programs includes a unique Hebrew/bilingual program in the public schools.

LEADERSHIP AND PLANNING: Winnipeg has been the subject of several studies enumerating community needs. A number of professional consultants have been engaged, including Dr. Gary Tobin and Touche Ross. The proposal incorporates a ten point program overview of Winnipeg's agenda. A small planning committee has been identified to develop the Lead Community Project.

Chair: (not addressed)

Staff: Director's position anticipated

COMMUNITY: OAKLAND (GREATER EAST BAY)

JEWISH POPULATION: 60,000

SUMMARY STATEMENT: Oakland considers the commitment and capability of its professional and lay leaders and the strong established infrastructure for Jewish community and education as assets which make the area ideally suited to participate in the Lead Communities Project. The area has confronted the challenges posed by increasing rates of intermarriage and assimilation and recognizes the need for aggressive remedial actions. Oakland has adopted the themes of "Jewish continuity and involvement" as guiding principles for future activities and as a lead community would focus on accessibility to Jewish education, instructional quality and comprehensive planning.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Oakland supports numerous formal and informal educational activities: they include a full-service accredited Jewish museum and an adult education wing, Lehrhaus Judaica. The impact of youth groups in the area is felt to be limited but compensated for by the informal programs offered by the Midrashot/AJE.

LEADERSHIP AND PLANNING: The renaissance of Jewish education in the Greater East Bay began in 1983 with the convening of a Federation-guided task force. Remedial measures were undertaken and assessed again in 1989 as the community faced new challenges posed by Soviet emigration. A special committee would be created to launch and administer the Lead Communities Project which would focus on the three identified areas: accessibility, instructional quality and comprehensive educational planning. The community was studied by Gary Tobin and Sharon Sassler in 1988.

Chair: Chosen from past Federation presidents

Staff: (not addressed)

COMMUNITY: BOSTON

JEWISH POPULATION: 200,000

SUMMARY: Boston's proposal highlights the city's rich educational resources with a demonstrated commitment to strengthening its Jewish identity. Fortunate to have a model central agency for Jewish education headed by an outstanding educator, a fine Hebrew College and college campuses, as well as established congregations within its midst, Boston's CJP proposes to use these as a means of reaching out to its Jewish population with formal and informal activities designed to enhance and expand every student's Jewish educational experience.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Boston has an extensive array of formal and informal programs now serving its Jewish population. The community enjoys access to the intellectual and physical resources offered by distinguished universities such as Brandeis, Harvard, and Tufts. A Passport to Israel program is currently in place.

Participation Rates (per Jewish Population)

Early Childhood:

Day School:

Supplemental Schools:

Post High School

TOTAL YOUTH PARTICIPATION:

LEADERSHIP AND PLANNING: The Commission on Jewish Continuity (est. 1990), which continues the five-year effort of the City's Task Force on Supplementary Jewish Education, has articulated several preliminary goals as part of its in-depth study of community needs and resources. They include teacher training and placement, an expanded Passport to Israel program, increased activity on college campuses, and better integration of college seniors into the broader Jewish community. Further, Boston's Jewish population has already been the subject of demographic and academic study and its respective congregations and agencies have a proven record of successfully working together.

Chair: Mark Goldweitz, CJP leader; Irving Goldweitz, Pres. Northeast Council of the Union of American Hebrew Congregations

Staff: Rabbi Barbara Penzner

COMMUNITY: COLUMBUS

JEWISH POPULATION: 16,650

SUMMARY STATEMENT: Over four years ago the Jewish community of Columbus acknowledged that it faced a crisis in identity and continuity and that educational innovations were needed in order to revitalize the community. Accordingly, the Columbus Jewish Federation allocated \$250,000, to create a new Special Fund for Jewish Education and a Committee on Jewish Identity and Continuity. Despite financial pressures, the Committee fulfilled its mandate, establishing working relationships between the Federation, Jewish Community Center, congregations and schools with the goal of developing effective new educational programs.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Columbus projects that its population of school age children will increase substantially over the next decade. The community supports pre schools, formal and informal Jewish education programs for youth and adults, as well as two teen Israel programs.

LEADERSHIP AND PLANNING: The Columbus Jewish Federation's Committee on Jewish Identity and Continuity has been at work for over four years. The Commission on Jewish Education was established in the Fall of 1991, would guide the Lead Community Project. Three target groups have been identified --families with young children, post Bar/Bat Mitzvah youth through young adults, and personnel in Jewish education. Strategies already implemented include creating the position of Community Coordinator for Jewish Education and funding for Binyan, the Council of Jewish Youth Groups.

Chair: Bernard K. Yenkin, Secretary of the Jewish Education Service of North America (JESNA)

Staff: Jeffrey Laschay, Community Coordinator for Jewish Education

FINANCIAL RESOURCES: The proposal points out that Columbus is home to three philanthropic families, the Meltons, Schottensteins and Wexners, whose generosity to Jewish education is nationally recognized.

COMMUNITY: DALLAS

JEWISH POPULATION:

SUMMARY STATEMENT: Not on the institutions and agencies already in place in the city, Dallas presents its community as a site that offers the CIJE a "clean slate" without entrenched constituencies or bureaucracies. Dallas is typical of most communities in that it includes some large, well-established congregations, yet it has many characteristics of a developing community. Dallas, like most communities, does not have a Jewish teacher training institution or a university Department of Judaica. The expertise that CIJE would bring to Dallas would enrich the community's educational resources.

CURRENT STATUS OF EDUCATION PROGRAMS: Dallas has a range of formal and informal Jewish education activities for children and adults.

LEADERSHIP AND PLANNING: Dallas's Jewish community and Jewish education have been the subject of at least four studies. A demographic study conducted by Dr. Gary Tobin for the Dallas Federation in August, 1990 provided relevant data for the Jewish Education Committee's current work on a long range strategic plan.

Chair: Dr. Stephanie Hirsch, Associate Director of the National Staff Development Council

Staff: Additional staff to be hired if selected Director of Federation Jewish Education Department to lead project

FINANCIAL RESOURCES: Proposal notes that members of the Education Committee includes several individuals who "may be inclined to support the efforts of the Committee through grants from their personal foundations."

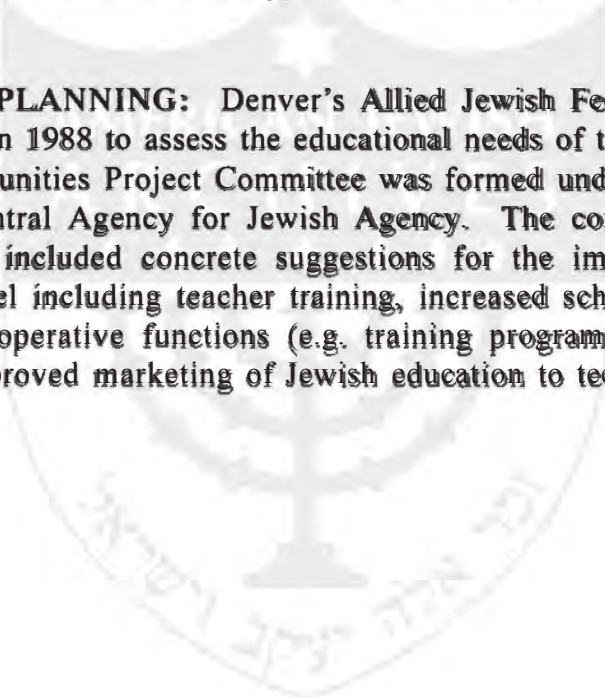
COMMUNITY: DENVER

JEWISH POPULATION: 45,000

SUMMARY STATEMENT: In the past twenty years Denver has seen phenomenal growth in Jewish activities with local families returning to their religious roots. The city sees its recent history running counter to the general trend toward assimilation among second and third generation Jews. During this period, Denver's Jewish community has developed broad-based coalitions --not only among agencies and institutions within the City --but with national counterparts as well.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Educational opportunities include early childhood programs, day and synagogue schools, special education programs, informal youth programs including camps and Israel trips and activities designed for college students and adults. Denver also supports the Mizel Jewish Museum and a weekly Jewish newspaper.

LEADERSHIP AND PLANNING: Denver's Allied Jewish Federation convened an Education Task Force in 1988 to assess the educational needs of the community. More recently, a Lead Communities Project Committee was formed under the auspices of the Federation and the Central Agency for Jewish Agency. The completed report of the Education Task Force included concrete suggestions for the improvement of Jewish education on every level including teacher training, increased scholarship fund for day schools, centralized cooperative functions (e.g. training programs, purchasing, shared administrators) and improved marketing of Jewish education to teens.



COMMUNITY: HARTFORD

JEWISH POPULATION: 26,000

SUMMARY STATEMENT: The Hartford Jewish community sees as its challenge finding a way to live meaningful contemporary Jewish lives that ensure that Jewish identity and heritage will be passed on to future generations. With a 60% rate of synagogue affiliation and an endowment that has grown from \$3M to 14M in seven years, Hartford has demonstrated its support and encouragement for programs to promote Jewish continuity.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: The Federation's Commission on Jewish Education (est. 1984) works closely with the area's day schools, Hebrew High School, Jewish Community Center, youth groups and representatives from the synagogues, schools and agencies with programs in adult, early childhood and family education. The Commission sponsors a branch of the Boston Hebrew College, a resource center and library, and provides support services for other programs.

LEADERSHIP AND PLANNING: The Federation established (Jan. 1992) a Jewish Continuity Task Force made up of sixty individuals representing the broad totality of the community. The Community has previously been the subject of three studies -- a 1975 self study of the Federation, a 1983 demographic study, and a 1990 market research study. An analysis of the current system with respect to the integration of formal and informal educational efforts, is planned. The Task Force will develop programs, as well as lay and professional leadership to achieve its goals.

Chair: Maurice Greenberg, Board Member of the Council of Jewish Federations and founder of the Maurice Greenberg Center for Judaic Studies at the University of Hartford

Staff: Cindy Chazan, Assistant Executive Director of the Jewish Federation of Greater Hartford

COMMUNITY: KANSAS CITY

JEWISH POPULATION: 19,100

SUMMARY STATEMENT: Guided by the themes of continuity, affiliation and identity, Kansas City has already demonstrated its communal commitment to the future of Judaism through the building of a Jewish Community Campus to house its agencies, including the Jewish Community Center, Federation, Jewish Family and Children Services, Jewish Vocational Services, Menorah Medical Clinic, and Hyman Brand Jewish Day School. The City is aware of the problems which confront it and has a growing community foundation for the endowment of innovative programming.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Kansas City supports a full range of formal and informal educational activities for children and adults. A 1986 demographic study determined that the proportion of Jews that had received a Jewish education approached 95% and that 52% of households belonged to a synagogue or temple.

LEADERSHIP AND PLANNING: The acknowledged focus for all community planning activity is the Commission on Jewish Continuity, Identity, and Affiliation (est. Jan. 1992) and it is this body that would guide the lead community project. Three fundamental goals have been identified for the Commission -- "Jewish Renewal, Community Covenant, and Jewish Community United 2000" (a complete examination of the City's needs and priorities). Kansas City has been the subject of previous studies, including a 1986 demographic study by Dr. Gary Tobin. Further, a 1989 self-assessment conducted by beneficiary agencies of the Federation resulted in improvements such as the establishment of a Jewish Parenting Center and expansion of student enrichment programs such as Israel trips and Panim el Panim.

Chair: Jeanette Wishna, active community leader

Staff: Responsibility to be shared by Director of Community Planning and Executive Director of Central Agency for Jewish Education -- Lead Community Director under consideration

COMMUNITY: METRO WEST, NEW JERSEY

JEWISH POPULATION: 120,000

SUMMARY STATEMENT: Metro West, a sprawling network of towns in seven counties, has a heavy concentration of young, well-educated families who have lived in the community for a relatively short period of time. The median income is among the highest for Jewish communities in the U.S. and 85% of the children have, or are likely to, receive some form of Jewish education. The community points to its nationally recognized efforts in emigree resettlement as evidence of its commitment to Jewish education and its ability to forge partnerships and coalitions. Further demonstration of these qualities is seen in the area's provision for infrastructure growth so as to supply the best possible facilities for Jewish educational programs. Metro West seeks to "market" the Jewish Community in new ways, as a means of attracting marginally affiliated individuals and families.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Metro West supports a full range of educational activities. One in five students is enrolled in a day school or yeshiva and 80% attend supplementary school programs. Israel programming and teacher training are being used as a model by the World Zionist Organization's Joint Authority for Jewish Zionist Education.

LEADERSHIP AND PLANNING: The lay and professional leadership of Metro West is prominently represented on the boards and committees of national Jewish educational organizations. Membership on the Lead Community Committee will reflect the ideological and geographical diversity of Metro West.

Chair: Arthur Brody, past President of Federation, Jewish Education Association and AAJE (now JESNA)

Staff: (not addressed)

COMMUNITY: MONTREAL

JEWISH POPULATION: 90,000

SUMMARY STATEMENT: Montreal is a uniquely cohesive community with a demonstrated ongoing commitment to Jewish education. The community is particularly proud of its outstanding day schools, the development of the Tal Sela Hebrew Language Arts Curriculum, and its innovative Israel Experience program. Montreal's proposal for the Lead Community Project would focus on the improvement and expansion of the Israel Experience in the hopes of involving practically every Jew in the community.

CURRENT STATUS OF EDUCATIONAL PROGRAMS: Montreal offers a full range of formal and informal education programs and support services. Canada's Private Education Act provides the day schools with half of their operating budgets from the Quebec Government (\$16,000,000).

LEADERSHIP AND PLANNING: Jewish education in Montreal has been the subject of eight studies since the 1980's. The Jewish Education Council is responsible for ongoing planning and analysis. A planning committee for the Lead Communities Project is currently in formation. The direction of the project, however, has already been focused on the Israel Experience.

Chair: Rabbi Sidney Shoham, experienced communal leader and congregational rabbi

Staff: (not addressed)

שופט מעקב

שופט זה מיועד למקרים בהם מסמך אחד יכול להיות רלוונטי ליותר מתיק אחד, וממילא בעצם שלד למסמך המקורי המתויק בתיק אחר.

1) שם כותב המסמך: T. Meier

29/12/92

2) תאריך:

3) הודו: C. Meier

3) הודו:

נדו 1:

4) תוכן מקוצר: lead communities

4) תוכן מקוצר:

The second draft of AW planning guide for the I. C.

5) שם התיק בו מתויק המסמך המקורי: 011na CXE

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

MEMORANDUM

To: CIJE Staff
and Lead Communities Date: November 30 , 1992

From: Art Rottman

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

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

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

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

MINUTES: Lead Communities Planning Workshop

DATE OF MEETING: November 23-24,, 1992

DATE MINUTES ISSUED: December 9, 1992

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

II. Welcome and Introductions

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

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

A. Atlanta

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

B. Baltimore

Baltimore has a stable Jewish population of 92,000. A two-year planning initiative concluded in 1990 with a series of recommendations including the need to increase funding for Jewish education (has been increased from 25% to 33%) and the establishment of a commission to look at the local Jewish education system,, now in its third year. Outcomes include a strategic plan for Jewish education and the establishment of a Fund for Jewish Education which is currently undertaking a \$10 million campaign. Day and supplementary schools are beginning to

work together to provide training for educators and to establish a fund for Israel experience programs.. A team of synagogue representatives is working together to develop a program of Jewish family education..

C.. Milwaukee

With a population of 28,000,, Milwaukee has four day schools in addition to an array of camps and pre-school opportunities.. Twenty-five percent of the community affiliates with the JCC. Community strengths include the centrality of the federation, the availability of scholarships for day schools and a common cost for each day school,, and coordination of teen programming.. The cost of Jewish education is a central issue in a community where average incomes are relatively low.. The community must also contend with a shortage of trained personnel and a 15% decline in campaign income over the last three years.. A Jewish Education Task Force was established in July 1991 and has developed a plan for the revision of use of the Central Agency for Jewish Education.. A broad-based commission on Jewish education is now being established.. It should be noted that for many years Milwaukee has taken the lead in putting Jewish education high on its communal agenda and funding it accordingly.

II. Lead Communities: A Concept and its Implementation

A. Annette Hochstein noted that the following principles had guided the work of the Commission on Jewish Education in North America:

1. Local, continental, and international resources must work together to support Jewish education..
2. Jewish education has multiple constituencies and venues. The Commission concluded that the best way to approach Jewish education would be to focus on two necessary conditions for change:
 - a. Personnel -- recruitment, training, benefits and placement to build a cadre of well-trained Jewish educators..
 - b. Community support -- the need to engage top community leadership in personal commitment and financial support for Jewish education..
3. It will be important to engage a community "across the board" in its commitment to Jewish education..
4. The best way to learn what will work is by doing it. Because education takes place at the local level, we must engage local communities in the effort to improve and develop Jewish education.. This led to the concept of Lead Communities..

5. It was concluded that Jewish education must be raised to a level which permits it to compete with the many alternatives available. This can best be accomplished by bringing local and continental resources together, by working intensively in limited settings, by working through programs, and by constantly monitoring, evaluating, and providing feedback.

B.. The Task Ahead

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

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

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

III. Introductory Remarks

As the morning session opened, Steve Gelfand of Atlanta noted on behalf of the three communities that the Lead Communities hoped to resolve the following in the near future:

- A. Believing that the communities can be more effective working together than on their own,, they seek agreement on common goals and approaches to achieving those goals..
- B. The communities need clarity on lines of communication and whom to talk with about various issues..
- C. While acknowledging that the communities are "in this together,," it was noted that not all community interests or needs will be the same.. It will be useful to clarify where there are common interests and where they diverge..
- D. It would be helpful to clarify,, understand,, and agree to goals and objectives for the planning process..
- E. Clarity of direction will help workshop participants to return home ready to work with community leadership and move ahead..
- F. The communities need CIJE to be involved beyond the role of convener. They seek help with planning,, content,, and access to seed money with which to move ahead.. CIJE should ease the way for communities to raise local money..
- G. The communities seek one programmatic initiative on which all can agree and move forward quickly to implementation..

These goals served as a backdrop for the day's discussion..

IV. Central Elements

As the central elements--building the profession and mobilizing community support--were discussed, participants were asked to consider principles on which to proceed.

Following discussion, it was suggested that certain common themes might be seen as principles:

- A. The personnel issues cut across all areas of Jewish education..
- B. ~~There is a need for a master plan.~~
- C. ~~The role of resources in impacting~~ Jewish education must be considered..
- D. In order to have an impact, there must be broad based "buy-in" to the importance of upgrading personnel..

~~In the discussion that followed it was noted that the Lead Communities provide a context in which to consider these issues systematically.~~
It will be important to establish criteria on which to judge the impact of the various approaches.. It was noted that the communities

will rely on CIJE for help with evaluation. It was also suggested that lay leaders should be involved in defining the evaluation process..

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

V. The Role of CIJE

A.. Best Practices and Consultation

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

1. The Supplementary School

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

2. Early Childhood Jewish Education

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

3. The JCC

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

4. Israel Experience

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

5. Day Schools

We have begun to take the first steps into this important area, and to develop a methodology specific to it.

Still to do:

6.. Jewish Camping

7. College Campus

CIJE will work closely with the Lead Communities to determine how to introduce a successful practice from one setting to another.

It was noted that while the communities are engaged in the planning process, it might be useful to work toward implementation of a Best Practices approach. Holtz will have materials on the supplementary school to the Lead Communities within several weeks. Following their submission, he and the educators working on the project will be available to meet with community leaders to discuss areas of interest and means of implementation. The Best Practices might also be an appropriate framework for the development of a pilot project during the initial year.

It was suggested that in order to introduce the Best Practices project to the communities, Holtz would be invited to meet with local lay and professional leadership.

It was suggested that another area in which communities might be ready to move ahead relatively quickly is that of the Israel experience. It was noted that the CIJE has promised to outline for the CRB Foundation a proposal for the Israel experience in the Lead Communities.

B.. Foundation Relations

It was reported that CIJE is in contact with several foundations, both Jewish and general, for support of work in the Lead Communities. In addition, CIJE staff is available to help Lead Communities in their approaches to local foundations. It was suggested that CIJE will be working with the Lead Communities to determine how best to proceed with their foundation development work.

It was suggested that there are initiatives under way in other cities which might be applicable in the Lead Communities. It was proposed that JESNA prepare an inventory of such initiatives and make it available to the Lead Communities.

VI: Work Plan -- Year One

A: Planning Process

Jack Ukeles reported that a planning guide is being prepared for use by the three communities. It is anticipated that the planning process will yield a five-year strategic plan and a specific action plan for the first year.

The proposed planning process includes the following seven steps::

1. Start-up

- formulation of a commission; undertake to inform and involve stakeholders ((e.g., community lay leaders, educators,, rabbis,, congregational leadership,, etc.)).

2. Self-study

- inventory and profile of educational system.
- assessment of strengths and weaknesses..
- analysis of personnel..

3. Identification of critical issues

- community moves from the general to the specific with strategic choices..

4. Development of mission or vision statement

5. Define priorities

- major strategic recommendations with priority rankings and sequences..

6. Design programs

- specific programmatic interventions..
- new initiatives..

7. Determine strategy to develop resources for implementation

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

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

B.. Introducing the Project into the Community

It was suggested that the first step is to define the community.. The following list of constituencies was developed:

1. Educators and senior educators
2. Rabbis
3. Lay leaders -- of general community and individual institutions
4. Parents and learners
5. Professionals at federation and other relevant agencies
6. Publics: the media and other communities

It was noted that it will be important to communicate with all of these groups. One way to do this at the local level is for the commission process to include well-publicized open meetings at which anyone in the community could be heard. In addition to making the local commission as representative as possible and extending involvement through task forces, a community might wish to hold focus groups to encourage a stronger sense of involvement..

It was suggested that local leaders will buy in more completely when they see evidence of action. One successful project would go a long way toward accomplishing this goal.

To help the communities get up and running, CIJE will work with the local communities to provide the following:

1. Core materials
 - a. Best Practices papers
 - b. Planning guide
 - c. Timetable
 - d. Press releases
2. Support for the planning and evaluation processes at a local level..
3. Assistance in quick start-up of at least one project, including funding support and/or assistance in finding that support..

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

VII. Next Steps

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

VIII. Conclusion

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



Community

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**1991 Federation Campaign* Results
(excluding endowment gifts)**

CITY	TOTAL AMOUNT RAISED	JEWISH POPULATION	AMOUNT RAISED PER CAPITA	PER CAPITA RANK WITHIN CJF GROUPING Group**	Rank	CHANGE (%) IN TOTAL AMT 1989-1991
BALTIMORE	\$21,507,000	94,500	\$228	G1	5	2%
ATLANTA	\$11,602,000	67,500	\$173	G1	9	14%
METROWEST	\$19,903,000	121,000	\$164	G1	10	-3%
BOSTON	\$20,267,000	200,000	\$101	G1	15	-21%
COLUMBUS	\$5,950,000	17,000	\$350	G2	2	-4%
MILWAUKEE	\$8,793,000	20,000	\$314	G2	3	-4%
PALM BEACH	\$12,501,000	65,000	\$192	G2	9	17%
EAST BAY	\$3,700,000	35,000	\$106	G2	18	20%
OTTAWA	\$3,363,000	14,000	\$240	G3	11	-2%

Allocations for Jewish Education

	TOTAL LOCAL ALLOCATION*	TOTAL ALLOC FOR JEW ED***	ALLOC FOR JEW ED (%)***	PER CAPITA ALLOC FOR JEWISH ED
ATLANTA	\$3,510,000	\$1,096,000	33%	\$16
BALTIMORE	\$14,543,000	\$3,003,000	22%	\$32
BOSTON	\$7,654,000	\$2,099,000	28%	\$10
COLUMBUS	\$1,842,000	\$447,000	26%	\$30
EAST BAY	\$1,263,000	\$246,000	23%	\$7
METROWEST	\$6,159,000	\$1,330,000	21%	\$11
MILWAUKEE	\$3,701,000	\$1,247,000	36%	\$45
OTTAWA****				
PALM BEACH	\$3,239,000	\$779,000	26%	\$12

* Excluding United Way

** CJF grouped according to city size: G1=Large, G2=Large Intermediate, and G3=Intermediate

*** Based on 1990 allocations. CJF data on Jewish education allocations in 1991 are not yet available


**** Information for Ottawa is not available: Canadian cities employ different methods for allocation

MEMORANDUM

867

To: **Arthur Rotman**
Shulamith Elster
Sol Greenfield
Mitchell Jaffe

c/o JoAnn Schaffer

From: Jim Meier 

Date: November 13, 1992

Re: Draft in progress of planning manual

The attached draft in progress is just that. While incomplete and in rough form, I would like your reactions both to ensure early course corrections and because we will soon need to present it to the lead community planners.

*Use booklet that relates
for more the content/ etc*

*Not done yet of
not want to adopt
to content of
the group*

*A Planning in perspective
The guide for the process is
the process is*

- DRAFT IN PROGRESS -

FOR INTERNAL DISCUSSION ONLY

LEAD COMMUNITIES PLANNING GUIDELINES

INTRODUCTION

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

The purposes of these guidelines are to:

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

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

I. FIRST STEPS

Rationale: First steps refers to preparations, attending to everything that can be done in advance to allow for smooth sailing once the serious work gets underway.

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

- Leadership has been identified, and
- The planning committee has been established

Benchmarks/tasks

- Compile packets of background information and distribute to each of the committee members. Box 1 contains a selection of materials that might be useful for this purpose.
- Establish a detailed timetable for the project by working backward from the year 1 end date, as well as forward based on the amount of time work components will require.

Working with the chairperson of the committee, establish a schedule of committee meetings all the way through the first year of planning. Don't forget to scan major Jewish and national holidays for conflicts. (See Box 2 for sample schedule.)

- Consider if sub-committees should be organized, and if so, in what areas. For example:

> In major Jewish education program areas such as supplementary schools, day schools, informal education, ~~higher education~~, adult education.

. In major functional areas such as personnel, funding, programs, coalition building.

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

Box 1: Examples of Background Materials

- A Time To Act
- Draft of CIJE letter of agreement
- Previous planning documents, particularly on Jewish education or continuity, prepared by your community.
- Summary of most recent Jewish population study for your community.

Box 2: Sample Timeline for First Year Planning

Phase	Time table (months)	Deliverable	Committee Meeting Subject
1. Start-up	0-1	<ul style="list-style-type: none"> • Form committee • Detailed workplan 	1a. Major issues in Jewish Education 1b. Review of workplan
2. Needs Analysis and Profile	1-5	<ul style="list-style-type: none"> • Design scheme • Profile of Jewish education; strengths and weaknesses • Report on findings 	2a. Design of needs survey 2b. Presentation of profile 2c. Discussion of findings
3. Critical Issues	4-6	<ul style="list-style-type: none"> • Formulate issues • Draft community mission statement 	3a. Resolve strategic issues 3b. Approve mission/vision statement(s)
4. Recommendations and Priorities	7-8	<ul style="list-style-type: none"> • List of recommendations with priority rankings and priority sequencing 	4. Recommendations
5. Programs	6-9	<ul style="list-style-type: none"> • Draft guidelines • Define program priority areas • Issue call for program proposals 	5a. Define program priorities
6. Implementation Plan	8-10	<ul style="list-style-type: none"> • Draft budget with resource objectives • Compile summaries of program options • Prepare first year implementation plan 	6a. Set resource objectives (\$) 6b. Select programs for next year 6c. Approve overall implementation plan

Time Guideline: Allow 3 - 4 weeks for the start-up phase of work.

II. ANALYSIS OF NEEDS

Rationale

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

- Identifies unserved and underserved needs for Jewish education, as perceived by groups within the community.
- Identifies unserved and underserved needs for Jewish education, as perceived by individuals.
- Helps identify critical issues, or choices that will need to be addressed.
- Provides a common base of information to enlighten decisions on critical issues.
- Can help to establish a standard of achievement that is acceptable within the community.

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

Issues

Two important issues should be articulated and addressed up-front:

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

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

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

- Populations

• 5. a b f c t

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

Box 3: Targeting

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

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

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

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

In designing the needs analysis, you must decide which measure or measures will be most useful for each subgroup. The criteria for targeting will be helpful in narrowing the measures as well. See also Box 4.

Box 4: Selecting the Measure of Need

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

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

3. Measures of Resources

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

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

Ideally, a profile of resources should also incorporate assessments of their *quality*. For example, while a community may appear to have enough supplementary school programs, the more crucial issue is how good are they? If enrollment is low is it because the prospective students are not out there or because the programs are poorly designed or run? Information on the quality and effectiveness of programs is important for identifying strengths and weaknesses of the existing system, for developing strategies for improvement, and ultimately for establishing a baseline against which the impact of future efforts can be measured.

Given the imperative to get underway quickly, we would encourage you to rely on existing information on quality and effectiveness, to the extent possible. Generally speaking, three types of measures can be used: (1) input, (2) output or performance, and (3) outcomes. See Box 5 for examples of measures you might want to consider. If you find an absence of information on effectiveness - that, in itself, may suggest that critical issues for the community will be: How should programs be evaluated and against what criteria? What are the characteristics of an excellent educational program? Should there be a process for setting community standards and "accrediting" programs? Should there be an effort to develop community-wide performance indicators and what should they be?

Box 5: Illustrative Measures of Quality and Effectiveness

- **Measures of inputs** are generally the easiest to obtain. Examples include: per capita expenditures for various age cohorts and programs, teacher/student ratios, average teacher salaries, per cent of teachers with advanced degrees, lay involvement, number of teachers participating in in-service training, etc.

Comparisons can be made to provide perspective on where the community stands in relation to other communities and the nation on key indicators.

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

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

Deliverables

away cal

The end product is a needs analysis reporting on the following for each key group:

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

Benchmarks/Tasks

1. Design Needs Analysis

- a. Focus: Select the primary groups to study.
- b. Measures: Decide on the perspective for measuring the need of each group.
- c. Develop Concept Scheme: Layout decisions on design for discussion with committees. [See Appendix 1 for sample]

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

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

3. Develop profile of present Jewish education personnel

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

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

- Develop a profile of the institutional resources, programs and services presently available in the community. Estimate the capacity of these programs if they are not being fully utilized. (See BOX 6 for information to include in a profile.)

5. Estimate of community need/demand (in categories of B2 and B3)

6. Gaps [B5 minus B4]

- A comparison of the market demand for the present programs will give an estimate of the unmet needs: who are the "unserved" or "underserved" groups in the community from the point of view of adult Jewish education?

Box 6: Elements of an Institution or Program Profile

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

Box 6: Methods

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

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

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

what can we do about them. E

III. CRITICAL ISSUES

Rationale

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

Deliverables:

- Explicit assumptions and criteria
- Formulation of critical issues
- Document summarizing consensus of committee on each critical issue
- Vision, or mission statement

Benchmarks and Methods

1. Assumptions and Criteria: In designing the best possible system for coordinating and supporting Jewish education, there will be several fundamental "givens" (e.g., that the school in a congregation is the primary educational vehicle for supplementary education). These assumptions should be made explicit to ensure agreement. Assumptions on which there is not consensus may well become "issues" which the committee must address. See Box 7 for sample assumptions.

*redo in light of
evolving
some prog.*

Box 7: Sample Assumptions

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

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

Box 8: Sample Criteria

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

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

It may be useful to classify issues in cascading categories that proceed from more philosophic (i.e., mission) toward more operational (i.e., programmatic or organizational). (See Box 9 for types of issues.)

Box 9: Classification of Issues

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

Also, Attachment ___ contains sample formulations of issues in each of these categories.

3. Committee Meets to Discuss Issues: The committee process for deliberation has several steps:

- Explicitly ask whether the issues presented are the right issues.
- Find areas of agreement and disagreements:

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

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

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

4. Formulate Vision Statement: The heart of a strategic plan is a vision or mission statement, which should project a clear view of the aspirations of the community. Because of its importance, and the difficulty of crafting a good one, the vision statement needs to be the product of substantial analysis and discussion; it should be prepared in the middle of the planning process, not at the beginning.

It should represent the resolution of mission-level strategic issues and frame a broad response to the needs assessment. The mission statement should project a clear view of the self-image of the community in relation to Jewish education; indicate where the community will place priorities in Jewish education, suggest what it will and will not seek to accomplish; identify whom it seeks to serve and how.

5. Committee Approves Vision Statement:

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

IV. SETTING STRATEGIES AND PRIORITIES

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

V. DESIGNING PROGRAMS

- A. Initiate program ideas or strategies/preliminary proposals
 - 1. Leadership (lay and professional) and community support (e.g.):
 - coalition building
 - recruitment (of leadership and community involvement)
 - 2. Programs for personnel
 - 3. Programs (e.g.: Israel trips, innovation)
 - 4. Planning and evaluation

work with
goals? projects
with in int?
(can this be
done? Is
conclusion
possible/
necessary)

5. Financial resources

B. Select program priorities/phasing

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

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

VII. NEXT STEPS: IMPLEMENTING THE PLAN

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

APPENDICES

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

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

TELEFAX

TO: Annette Hochstein **DATE:** November 6, 1992

FROM: Jo Ann Schaffer **FAX#:** 619 452

Number of pages (including this sheet) 2

MESSAGE:

THE ATTACHED HAS BEEN FAXED TO THE LEAD COMMUNITIES.

PLEASE HOLD THESE DATES

**MONDAY, NOVEMBER 23
AND
TUESDAY, NOVEMBER 24**

The Council for Initiatives in Jewish Education will host a dialogue in New York with Atlanta, Baltimore, and Milwaukee planners on immediate and long-range plans for the revitalization of Jewish education through its Lead Communities Project.

We will begin with dinner at 6:00 p.m. on Monday and continue till 4:30 p.m. on Tuesday. Please contact Jo Ann Schaffer at (212) 532-1961, if you would like her to make hotel arrangements for you.

[draft 10-21-82]

Lead Communities Planning Guide
Preliminary Outline of Contents

I. Analysis of needs

A. Profile of current community demographics:

1. General population characteristics: cohort sizes
2. Other Jewish education sub-group sizes (e.g., early childhood, supplementary school, day school, lay leaders, adult education learners, communal service professionals, college-age youth, other special groups)

B. Profile of present Jewish education personnel

1. Size of key groups of personnel (e.g., day school principals, day school teachers, supplementary, early childhood ...) by institution/program
2. Skills, expertise and background

C. Program capacities and participation rates (formal and informal programs, by institution/program)

D. Estimate of community need/demand (in categories of A2 & B1)

E. Gaps [D - C]

II. Assessment of strengths and weaknesses (What works, what doesn't work)

A. Areas for assessment

1. Students and programs (e.g. levels of attainment)
2. Personnel
 - * by program: quality, assets and limitations
 - * professional development programs and opportunities
3. Community support
 - * Lay involvement and leadership
 - * Coordination and collaboration within system
 - * Funding: Amounts and participation rates
4. Other system and planning issues (e.g.):
 - * Fundraising and allocations
 - * Information (system capabilities)
 - * Uses of technology

B. Exploratory comparisons (Programs and performance in other places)

III. Strategic issues (confronting and resolving critical choices)

- A. Identify strategic choices
- B. Resolve strategic choices
- C. Develop community-wide mission or vision statement(s)

IV. Establishing strategies and priorities

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

V. Designing programs (to address priorities)

- A. Initiate program ideas or strategies/preliminary proposals
 - 1. Leadership (lay and professional) and community support (e.g.):
 - ◆coalition building
 - recruitment (of leadership and community involvement)
 - 2. Programs for personnel
 - 3. Programs (e.g.: Israel trips, innovation)
 - 4. Planning and evaluation
 - 5. Financial resources

B. Select program priorities/phasing

VI. Prepare implementation strategy: multi-year framework, first year action program

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

VII. Next Steps: Implementing the plan

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

APPENDICES

General format for each section

Section heading

Rationale: What the section is about, why it is important, how it relates to the planning process.

Deliverables: Important junctures, or deliverables, and when they must be completed to keep the project on schedule.

Benchmarks: Critical requirements and optional steps/tasks to achieve the benchmarks for the phase.

Methods: "How" to do the task.

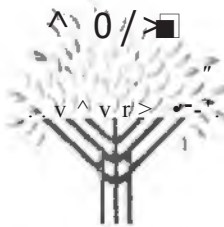
Comment Box

For elaborative comments, suggestive hints, or enhancement options.

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

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

Examples:



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CT 11/11/11
5- 11/11/11
2 11/11/11

MEMORANDUM

TO: Art Rotman
FROM: Richard Meyer
DATE: November 4, 1992 1992
RE: Milwaukee's Participation in the "Lead Communities" Project

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

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

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

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

HN/RM/nm

1360 N. Prospect Avenue

Milwaukee, Wisconsin 53202-3094

414-271-8338

FAX 414-271-7081

Betsy L. Green
President

Richard H. Meyer
Executive Vice President

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

LEAD COMMUNITIES PROJECT • Mailing Address • 163 Third Avenue #128 • New York, NY 10003
tel: (212) 532-1961 • fax: (212) 231-3407

October 21, 1992

LETTER OF UNDERSTANDING

Dear Mr. Meyer;

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

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

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

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.

to create a framework for Jewish Education for the 1990's; to gain the broad base of support and participation and to implement a plan that improves the overall quality of what is offered and to facilitate involvement in areas that would be most effectively addressed.

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

⁸ See also Lead Communities: Program Guidelines (January, 1992) pp. 7-11.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

1992-93 is the Planning Year (see below)

1993-94 is the first Action Year

1994-95 is the second Action Year

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

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

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

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

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

In support of these efforts, CIJE agrees to:

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

⁹ See Appendix 4 for a brief description of some of the possible areas of content of Lead Communities Plan.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

The Lead Community agrees to:

- Establish a ~~Lead Communities Committee~~ ^{Commission on Jewish Education} to direct the project. The ~~Committee~~ ^{Commission} will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by ~~Lease Skindand Jane Gelman~~ ^{Commission}
- 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~~ ^{Committee} to staff the ~~Lead Communities Committee~~ ^{Commission on Jewish Education} and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g. ~~the Planning Director of Federation and the Director of the BIE~~ ^{active participants}) 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~~ ^{Coordinator} to direct the Action Program for 1993-94 ~~onward. (which may be the same person as the Planning Coordinator)~~
- Integrate the findings of the Best Practices Program appropriate to the Lead Community. (as discussed above).
- Identify and begin one or more experimental programs within the first year.
- ~~Build the profession of Jewish education, and thereby address the shortage of qualified personnel.~~ ^{Address the building of the}

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

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

CIJE

Federation

By: _____

By: _____

Title: _____

Title: _____

Date: _____

Date: _____

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

November 2, 1992

ALFRED L. GOPLAN
CHAIRMAN
RICHARD W. LANSBURGH
FIRST VICE CHAIRMAN
CAROLE SIBEL
VICE CHAIRMAN - ACM
ALVIN D. KATZ
VICE CHAIRMAN (CR&B)
BENJAMIN KUNTZ
VICE CHAIRMAN (CAMP)
BRENDA B. L'PHITZ
VICE CHAIRMAN (WD)
JOSEPH A. COOPER
TREASURER
RICHARD S. DAWSON
ASSISTANT TREASURER
DAVID HIRSCHHORN
SECRETARY
ALVIN YERBERG
ASSISTANT SECRETARY
DARRRELL D. FRIEDMAN
RESIDENT

Mr. Arthur Rotman,, Executive Director
Council for Initiatives in Jewish Education
163 Third Avenue,, #128
New York, NY 10003

Dear Art:

This letter is in response to your letter of understanding, confirming Baltimore's participation with the Council for Initiatives in Jewish Education in the Lead Communities Project. We are very excited to be part of this project and are confident that our collaboration with CIJE will demonstrate that we can achieve excellence in our efforts to dramatically improve Jewish education in Jewish communities throughout North America..

In terms of the draft document,, we are suggesting the following amendments/additions:

Page 1, Paragraph 4, "The Jewish community of Baltimore has established a Commission on Jewish Education of THE ASSOCIATED. The community views the Lead Communities Project as an opportunity to break new ground in our strategic planning process for Jewish education. At a time when we are beginning to shape our consensus document, we feel that CIJE can provide the critical assistance our community needs, both in terms of professional expertise and financial resources, to move its educational agenda forward. At the same time, we believe Baltimore can serve as a model of progress and performance in Jewish education for other North American Jewish communities."

Page 2, Paragraph 2, "The community by February 1, 1993 will prepare an outline of the 5 year plan identifying the major topics to be covered, preliminary findings, program ideas and tentative conclusions."

Page 2, Paragraph 4, "The plan and the action program will be completed by May 31, 1993."

Page 3, fifth point,, "The Lead Community Committee will be chaired by LeRoy Hoffberger."

Page 4, second point,, "Commit our best efforts to significantly expand the communal resources committed to Jewish education. Based on one community's experience in

implementing the recommendations of its Commission on Jewish Continuity,, significant expansion should result in a target of at least a 40% increase in communal resources for Jewish education by the third year action program.. We fully endorse and underscore the definition of communal resources to include the total dollars from which we would allocate funds,, including regular allocations,, local and non-local foundation grants,, endowment funds raised through our Fund for Jewish Education,, and other sources of funds.

If the above changes meet with your approval,, we are ready to proceed with the formal signing of the Letter of Understanding.. We look forward to hearing from you with a final draft..

With best regards..

Sincerely,,



Darrell D. Friedman
President

/tw

ART..ROTMAN..NK..TW

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

LEAD COMMUNITIES PROJECT • Mailing Address • 163 Third Avenue #128 • New York, NY 10003
tel: (212) 532-1981 • fax: (212) 231-3407

MEMORANDUM

To: Darrell Friedman
From: Art Rotman
Date: October 21, 1992
Re: Letter of Understanding

Enclosed is a draft of the Letter of Understanding covering the mutual expectations of CIJE and Baltimore for participation in the Lead Communities Project. The draft incorporates suggestions made at the meeting in Baltimore with Shulamith Elster and Jack Ukeles.

Please note that on page one we have left room for you to insert a rationale statement that is specific to your community. We want you to be comfortable with this document, so feel free to edit it as needed.

If there are minor changes that you would like to make, please mark up the draft and send it back to me by fax.

If you have significant concerns with the document, I am available to come to Baltimore in early November to discuss the Letter of Understanding in more depth. Let me know as soon as possible, so that we can coordinate calendars.

If there are no substantive changes, then you should proceed with your own professional and lay review process. We would like to hold a formal signing ceremony in Baltimore before the end of the calendar year.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

LEAD COMMUNITIES PROJECT • Mailing Address • 163 Third Avenue #128 • New York, NY 10003
tel: (212) 532-1981 ■ fax: (212) 213-34078

October 21, 1992

LETTER OF UNDERSTANDING

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

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.....

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

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

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

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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The plan and the action program will be completed by May 31, 1993.³

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.

³ See Appendix A for a brief description of some of the possible areas of content of a Lead Communities Plan.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

The Lead Community agrees to:

- 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.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

(ILLUSTRATIVE)

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

=====

- How the community plans to approach major improvements in educational personnel (e.g., in-service education for all educators)
- What improvements are envisioned for each major setting within which Jewish education takes place: congregations and supplementary schools; ICC'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)

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

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

CIJE

Federation

By: _____

By: _____

Title: _____

Title: _____

Date: _____

Date: _____

Monitoring, Evaluation, and Feedback Project
Ellen B. Goldring
November,, 1992

The goal of the first year of the project is to monitor the process of becoming a lead community and focus on the present state of affairs in the communities as well as visions of change in terms of mobilization,, professionalism and programs..

All of the field researchers have had initial contact with the lead communities and one of the field researchers has moved to Atlanta. The second field researcher will be moving to Baltimore this month. The third field researcher lives in Madison,, WI., and will be responsible for Milwaukee.

The first set of visits to the lead communities is underway.. All three of the field researchers will be in the same community during the visits::

Milwaukee- Nov. 15-21
Baltimore- Dec. 6-10
Atlanta- Dec. 12-17

Since the announcement of the three lead communities,, the Monitoring,, Evaluation,, and Feedback Project is concentrating on four broad areas.

I. Introducing Field Researchers to the Lead Communities

Initial meetings in the communities
Ongoing conversations with key people
Learning about the communities
Establishing a trusting and effective relationship

II. Focusing the content

Focus 1: The Launch and Gearing Up::

Learning about the process of getting
going and becoming prepared

Reacting to being chosen as a lead community

Developing relationships with CIFE

Helping communities think about themselves

Focus 2: Visions of Change:

Community mobilization

Professionalization of Jewish education

Actuality--what is in place now? What is going on now? Who participates? How?

What is the process of change?

Implementation plans

III.. The methodology

Interview protocols around the areas of:

- preparation
- mobilization
- professional lives of educators
- background information

Sampling procedures ((lists of people/functions))

Observations

Collection of documents and artifacts

IV. Issues under discussion.

Reports and feedback

Access needed by researchers

Communication

Draft
9/23/92

10/15/92

LETTER OF UNDERSTANDING

Dear _____,

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

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

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

The Jewish community of _____ [Atlanta, Baltimore, Milwaukee] has established a [specific language suggested by each community], the community views the Lead Communities Project as an opportunity to [specific language suggested by each community].

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].

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

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

This letter covers the three year period from Sept 1, 1992 through August 31, 1995. *why not 5 year*

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] will) 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 *fi.....* 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. *It's M*

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. *r l v Oaxa*

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. *3*
- Provide educational 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. *4*

" 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 DJE) 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.⁴ 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 plan and programs, as described above.
- Work with CIJE to disseminate the results of the experience at the communities.

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

CIJE

Federation

By: _____

By: _____

Title:

Title:

Date: _____

Date: _____

⁴ 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].

Field Researchers' Plan for Year One
Lead Communities Project
Prepared by Roberta Goodman
August 24, 1992

Spoke with
Adam on
16/9
Annette

The following elements constitute the field researchers' overarching plan for year one:

Part I - Getting to Know the Communities: "Finding Your Feet"

A. Space

Becoming familiar with the spatial layout - neighborhoods, geography, location of Jewish institutions, etc.

B. Time

Rhythm of the cycle of events in the community; institutional workings, Jewish year, secular year - Canada has different national and provincial holidays than in U.S.

C. People

Compile lists of people: contacts in each institution, program participants, teachers, unaffiliated.

D. History

Gain a sense of the historical context of each community: general community; Jewish community; history of institutions; major local events that distinguish the Jewish and general communities.

E. Demographics

Locate sources of demographic information; identify what has already been done; and consider what other demographic information might be helpful to collect in the future.

Part II = Negotiating Our Role in the Lead Communities

Establishing a trusting and working relationship with the lead community members.

Part III = Vision

A. Content of the Vision

1. professionalization
2. mobilization
3. programs

Outcomes goals ?

B. Evolution of the Vision

1. content
2. process
3. critical reflection

C. Relationship among the community members

1. positions of power and influence
2. communication

Part IV - Actuality

A. What is the community doing now in terms of Jewish education?

1. professionalization
2. mobilization
3. programs

B. Relationships

1. positions of power and influence
2. communication

Part V - Key Concepts

A. What are they?

B. How are they being defined?

Calendar for Lead Communities Visitations

September 14 –October 20, 1992:	First site visit (own community)– 10 days to 2 weeks
November 8 –November 15, 1992:	Community A
November 15 –November 22, 1992:	Community B
December 6 –December 13, 1992:	Community C
January 4 –January 5, 1993:	Meet to write first report
January 15 –January 18, 1993:	Meet with Ellen in Nashville
January 24 –February 6, 1993:	Community A
February 7 –February 20, 1993:	Own community
February 21 –March 6, 1993:	Community B
March 7 –March 20, 1993:	Own community
March 21 –April 3, 1993:	Community C
April 4 –April 24, 1993:	Own community
April 25 –? , 1993:	Meet to revise reports
May 2 –May 8, 1993:	Community A
May 9 –May 15, 1993:	Community B Report #2 due
May 16 –May 29, 1993:	Own community
May 30 –June 6, 1993:	Community C
June 7 –June 27, 1993:	Own community
June 28 – ?, 1993:	Meet to revise reports
July 11, 1993:	Report #3 due

COPY



September 1, 1992

CENTRE for EDUCATIONAL SOCIOLOGY
Department of Sociology

The University of Edinburgh
7 Buccleuch Place
Edinburgh EH8 9LW
Scotland

Fax UK (0)31 668 3263

Email CES@uk.ac.edinburgh

Telephone UK (0)31 650 1000

or direct dial UK (0)31 650 4186/411877

Ms. Roberta Goodman
149 Nautilus Dr.
Madison, WI 53705

*Spoke with Adam
on 16/9
Annette*

Dear Roberta,

Thanks very much for forwarding the "Field Researchers' Plan." It looks very promising. I have a few comments, which I hope you can raise with the group:

(1) What is the linkage between this plan and the tentative calendar? One possibility is as follows:

Part I, A - E: Begin addressing during informal visit in Sept. - Oct.

Part II: Also begins during initial visit, carries through first intensive visit in Nov. - Dec.

Parts III - V: Begin during first intensive visit, Nov. - Dec. Part IV based at first mainly on interviews, supplemented by observations during second intensive visit (Jan. - March) and throughout by f.r.'s in own communities. Limited sample of respondents during first initial visit, wider sample during second intensive visit and throughout the period in own communities.

I realize we can't be sure about this yet, but I think we need a better sense of what we hope to accomplish at each of the stages we listed in the calendar. This should also help us address issues of reporting that I mentioned in my letter of Aug. 31.

(2) Regarding Part I, E (demographics), we will want to be in touch with the local CUE contact person to coordinate our efforts with those of the local self-study.

(3) One important point seems to get buried--I assume that monitoring the community's efforts to mobilize and plan is incorporated under Part III, section BB, point 2 (process). I have no objection to the way the issues are organized, but I wanted to point out that this is so important so it doesn't get lost. Perhaps the mobilization and planning process really incorporates all of section B (evolution of vision).

Thanks for keeping me up to date! From the logistical standpoint, I'm just delighted about Milwaukee. Ellen mentioned to me the plan that for intensive visits, you would stay with the others in Milwaukee. That sounds like a good plan. But for supplementary visits, phone calls, etc., it's practically like having you on site!

Regards to all, Adam

cc: Julie, Claire, Ellen, Annette ^ ^

As I explained today, the initial visit is not intended to be a rigorous data-gathering exercise, but is aimed more at orienting ourselves to the communities, introducing ourselves to the local CIJE organizers, finding a place to live for Claire and Julie, etc. It will be a low-key visit. I think your suggestion of asking Shulamith to introduce us to the local CIJE leader(s) will facilitate this approach. It may be useful to arrange a meeting with her first, to work out the guidelines for entry into the lead communities. Alternatively, we may work on this long-distance and ask her to meet with each researcher separately for a short time immediately prior to their first trip to their own communities.

The second set of visits (Nov.-Dec) will be more intensive, consisting primarily of interviews which will address all three of

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2JH13 EKJC68@ERC.VAX.EDINBURGH.AC.UK => annette@hujiwms; 31/08/92, 18:44:36;; M EK S.MAIL

EBCDIC (EKJC68@ERC.VAX.EDINBURGH.AC.UK)

INMIME type: text/plain

Received: by HUJIWMS via NNTP (HUJMail-V66j); Mon, 31 Aug 92 18:44:36 +0300

Received: from RL.IB by UK.AC.RL.IB (MAILER R2.07) with BSMTPE id 989838 Mon, 31 Aug 92 16:45:56 BST

Received: from RL.IB by UK.AC.RL.IB (MAILER R2.07) with BSMTPE id 9157;; Mon, 31 Aug 92 16:45:51 BST

Via: UK AC.RL.IB.ERC.VAX; 31 AUG 92 16:45:48 BST

Date: Mon, 31 AUG 92 16:44:39

From: EKJC68@ERC.VAX.EDINBURGH.AC.UK

To: annette@hujiwms

Subject: Hard copy with attachments will follow by airmail

Sender: JANET "EKJC68@UK.AC.EDINBURGH.ERC.VAX"
<EKJC68@ERC.VAX.EDINBURGH.AC.UK>

August 28, 1992

Ms. Annette Hochstein

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EMAIL>

Hebrew Institute of Jerusalem
2a Hatzfira St.
Jerusalem 93012 ISRAEL

Dear Annette,

As usual I enjoyed our visit today and found it very helpful or stimulating my thinking about the evaluation project. I enclose a draft of the tentative schedule for field research.

Following our discussion,, I would add the following items::

(a) Late October: conference call with evaluation staff ((AG,, EG, and field researchers)) and AH and SF to discuss the probable content of the January reports.. This will be preceded by informal sharing of ideas about what might go into the reports within this group and with others e.g.. Art,, Barry..

(b) Mid-January: advisory committee ((SF, AM,, JC,, MI)) will review a draft of the report to be released at the end of the month.. We will get this to you as early in January as possible,, and we will need a quick turnaround on your

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ZJH response..

The tentative schedule was prepared to give us a sense of what our workload is and how much we can get done in a year.. It is definitely subject to modification to take into account the needs of the lead communities and other contingencies that may arise..

As I explained today,, the initial visit is not intended to be a rigorous data-gathering exercise,, but is aimed more at orienting ourselves to the communities,, introducing ourselves to the local CIJE organizers,, finding a place to live for Claire and Julie,, etc.. It will be a low-key visit.. I think your suggestion of asking Shulamith to introduce us to the local CIJE leader(s) will facilitate this approach.. It may be useful to arrange a meeting with her first,, to work out the guidelines for entry into the lead communities.. Alternatively,, we may work on this long-distance and ask her to meet with each researcher separately for a short time immediately prior to their first trip to their own communities..

The second set of visits ((Nov.-Dec)) will be more intensive,, consisting primarily of interviews which will address all three of

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ZJH substantive questions.. Because the visit will be only a week long,, the number of respondents will be limited,, probably including the first and part of the second segments of our "snowball" sample ((local CIJE leaders and leading educators)).

With regard to the question you raised about what if a respondent says,, "I don't know about goals,, you tell me,,," the interviewers will have a variety of probes which may simulate responses despite initial hesitation.. More generally,, I agree that we need to prepare the field researchers as well as possible so such responses will not take them by surprise.. I hope that by posing the question about goals,, we will stimulate participants in lead communities to think about aims for Jewish education,, and provoke a dialogue among them.. Incidentally,, I would not be too dismayed if the federation professionals are unconcerned or are unable to articulate goals for education.. After all,, that is not their area.. I think it is more important that CIJE induce the educators in the community to articulate a ((hopefully coherent and as cohesive as possible)) vision or visions,, and to think about how the vision(s) might be attained.. But the visions question cannot be restricted to the educators,, but rather reach out to the

th
Send us
talk piece

Rapid
feedback

Via: UK.AC.ED.ERC.VAX; 11 SEP 92 12:24:41 BST
Date: Fri, 11 SEP 92 12:23:46
From: EKJC68@ERC.VAX.EDINBURGH.AC.UK
To: annette@hujilwms
Subject: reports
Sender: JANET "EKJC68@UK.AC.EDINBURGH.ERC.VAX"
<EKJC68@ERC.VAX.EDINBURGH.AC.UK>

Annette,

In anticipation of introductory meetings in the lead communities,

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THE field researchers are asking what they should say about reports. Ellen and I have decided we need to come up with something more definite than we've said so far. This would be part of an informal presentation that the field researchers will make when they are introduced by Shulamith to people in their own I.e.'s. These meetings will stress our collaborative spirit and show that we view them as clients as well as our subjects. It will provide opportunities for questions as well as for I.e. participants to say how monitoring and ev> action can help them, what types of information they would like, etc.

What follows is a draft of what we could say about reporting. I'd welcome any comments you may have.

Field Researcher reports in lead communities:
A Tentative Proposal

The tentative plan of work for field researchers calls for preparing three written reports, to be released in late January, early May, and early July. The first two reports will be primarily descriptive, while the third will be more analytic, and

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Q111 address changes that occur over the course of the year.

The purpose of these reports is to provide feedback to both the national and local CIJEs on each community's progress toward planning and, ultimately, implementing programs that will substantially improve Jewish education and that can serve as a model for the rest of North America. It is not possible to say at this point what we mean by "improve"; indeed part of the field researchers' task will be to discover and articulate each community's visions of improvement. Based on A TIME TO ACT, we anticipate that progress will occur in mobilizing the community--lay and professional--in support of Jewish education, and in enhancing the profession of Jewish education, among other areas.

Written reports will be presented to the Director of the CIJE and to the local Chairs of the CIJE project. For the first two reports, community members will receive only the reports on their own communities, and will make their own decisions on wider distributions. In addition, the field researchers will be available to make oral reports to groups within the lead communities as mutually agreed upon by the field research team

I am suggested to leave this more vague on the first meeting.

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@@munal professionals,, the lay leaders,, congregants,, etc.. We will be examining not only the visions themselves,, but the process each lead community lays out for itself to establish and achieve educational goals..

I also like your suggestion of contacting people outside the local communities,, particularly persons at the national training seminaries. There could be two purposes to such discussions:: (1) Provide background information for field researchers on the range of possible goals for Jewish education that may or may not be expressed in lead communities;; (2) Gather information on the links, if any,, between the training institutions ((and/or their affiliated movements)) and the lead communities.. The down side to this plan is that our time is limited and I'm not sure how to work it in. At a minimum,, I think it is important that we make time for the field researchers to meet with Barry Holtz..

I'm glad things went well in the States and I'm delighted and excited that the project has truly started.. I think you and Se. our should take pride in each major step.. We in the evaluation project will try to do our part to keep things moving in the right

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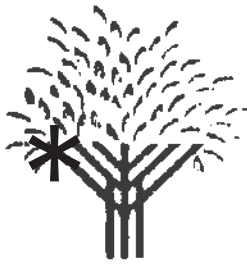
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As always,,

Wdian

CC: Ellen Goldring

DO
Caryl
Schiff
Sach-lee
I'll prepare



MILWAUKEE JEWISH FEDERATION

March 25, 1992

Dr. James Meier
Council for Initiatives in Jewish Education
c/o Ukeles Associates, Inc.
611 Broadway, Suite 505
New York, NY 10012

Dear Mr. Meier,

We are pleased to submit Milwaukee's application to become a "Lead Community." This opportunity comes at a particularly timely juncture in our community's planning process. In 1981 the Federation completed an extensive study of Jewish education needs and services in Milwaukee. This process resulted in a series of major initiatives implemented through the Milwaukee Association for Jewish Education (MAJE) over the following 10 years. Among the accomplishments were an institute for preschool educators, a community high school program, a creativity and resource center and a series of teacher education and staff development workshops in cooperation with day schools and synagogues. During the last three years, however, the Milwaukee Federation's resources have been increasingly strained due to the community's deep involvement with Soviet resettlement, as well as demographic changes in the community's donor base.

The Milwaukee Jewish Federation continues to rank Jewish education among its highest priorities in the community. Milwaukee ranks number one among all Group II cities in its allocations to Jewish education. In 1991/92, approximately one-half of all funds distributed locally went to support a broad spectrum of Jewish education activities in a variety of formal and informal settings. In addition, our Jewish Community Foundation has intensified its efforts in endowment development for Jewish education. There are currently 18 funds representing \$1.5 million that have been established to support a variety of Jewish education activities.

Based upon changing financial circumstances and the continued high priority given to Jewish education, the Federation established a new Task Force on Jewish Education in July 1991, with the responsibility of framing a new community agenda, that takes into consideration the Federation's ability to appropriate funds over

LEONARD PROSPECT AVENUE

MILWAUKEE, WISCONSIN 53202

TELEPHONE: 442-1111

FAX: 442-2711

RECEIVED BY: M. W. K. S. K.
/K. W. K. S. K.

RECEIVED BY: M. W. K. S. K.
/K. W. K. S. K.

Lead Community


Page 2

the next few years.. It's membership was constituted from the top lay leadership in the community:: The Presidents of each Federation agency which has Jewish education as a major component of its program,, five Federation Officers and the Jewish Education Budget Panel Chairperson.. It is currently Chaired by Stephen Richman,, a Vice-President of the Milwaukee Jewish Federation and its Agency Relations Chairperson,, who oversees the community's planning and allocation process.. It was felt that someone of Mr. Richman's stature and position was necessary to ensure that the work of the Task Force remained in the forefront of the community's planning.. The Federation's President and Executive Director are also members of this Task Force..

The initial phase of the Task Force has addressed itself to some of the immediate funding issues Milwaukee is confronting this next year while maintaining Jewish education as a top priority.. It is the natural committee to guide the "Lead" community process.. Following the allocations process this Spring,, the Committee will address the more general questions of designing a plan that enhances formal and informal education opportunities in multiple settings.. The Committee will be expanded to include top synagogue leadership and key professionals. In addition,, consideration is being given to creating an advisory group to work with the Task Force and MAJE.. The group will be made up from rabbis,, teachers,, synagogue principals and education chairs.. The Task Force is currently staffed by the Federation's Planning Director.. It is anticipated that if Milwaukee is selected as a Lead Community, additional funding will provide resources to hire a Lead Community Director,, more directly involved in Jewish education.. This will greatly facilitate the planning and implementation process..

We appreciate your consideration of our application and look forward to hearing from you..

Sincerely,



Joseph M. Bernstein,, President
Milwaukee Jewish Federation

Statistical Profile

A. Enrollment

Enrollment

1. Sixty-six percent of all Jewish children (ages 6 - 17) are receiving some form of Jewish education.
2. Once children have reached Bar Mitzvah age, the dropout rate is considerable. Enrollment among children ages 6-12 is 89 percent. It drops to 49 percent among ages 13-17.
3. Approximately one-third of those children enrolled in some formal educational setting are enrolled in one of four Jewish day schools.
4. Fifty-seven percent of Jewish children under the age of six are in some kind of pre-school program. Almost half of these are enrolled in programs under Jewish auspices. The demand for pre-school programming is expected to continue at least 3-5 years, based upon the number of younger siblings of children already enrolled in Jewish community pre-school programs.
5. It is estimated that over one-half of those receiving some form of Jewish education (ages 5-21) are getting it through an informal setting, primarily camps and youth groups.
6. In fiscal 1991-92 the Federation allocated \$1,847,117 from its Campaign in support of Jewish Education and related programs. The total allocated to all local agencies and programs was \$3,182,831.

B. General Demographics of the Milwaukee Jewish Community

1. Population size - 26,000 individuals; 12,000 households
2. Affiliation - it is estimated that 60 percent of the Jewish community is affiliated with synagogues; approximately one-third are members of the Jewish Community Center.

<u>Program</u>	<u>Ages</u>	<u>Agencies</u>	<u>Enrollment</u>	<u>Fed. Funding</u>
<u>Nursery School</u>	2-5	CJCC, JFS Day Care, Lubavitch Nursery School, 2 synagogue schools	400	\$235,438
Day School	4-13	Hillel Academy, Milwaukee Jewish Day School, Yeshiva Elementary School,* Wisconsin Institute for Torah Study*	700	\$840,396
Congregation Schools	4-18	8 Congregation Schools	1,381	**
Post High School	16-18	Wisconsin Institute for Torah Study	28	*
Camp	2-16	Jewish Community Center and Lubavitch Gan Israel	1,025	\$153,778
Youth Groups	13-17	B'nai B'rith Youth Organization	500	\$54,236
Campus Groups	17-22	B'nai B'rith Hillel Foundations Madison and Milwaukee	750	\$134,372
High School Activities (eg. High School in Israel, Panim El Panim, Single Events)	12-14	Milwaukee Association for Jewish Education (MAJE)		\$38,589
(^Israel Programming		Community Shaliach		\$50,000
Educational Support Services (Consultation, Teacher Education, Teacher Resource Center)		Milwaukee Association for Jewish Education	77% of community teachers participate in 1 or more programs	\$262,384
Continuing Education	Adult	MAJE - Hebrew Ulpan JCC/MAJE - Meitok Hill School	35 65	\$24,924

*WITS and YES are not Federation agencies and do not receive Campaign allocations. However, the Federation was able to secure a \$250,000 grant for each of the years 1991-92 through 1993-94 to support day school scholarships, in which \$40,000 and \$130,000 were awarded to each school respectively.

**Federation does not currently make allocations to synagogues. However, they are the primary service recipients of MAJE, including \$21,200 in teacher grants for professional education. They also receive grants from our Jewish Community Foundation.

II. Current Community Needs in Jewish Education

A. Extending Jewish learning beyond the Bar/Bat Mitzvah ages

Jewish education needs to be viewed as a lifelong commitment. While 89 percent of children, ages 6-12 are enrolled in some formal program, the "dropout" rate after Bar Mitzvah is dramatic. Considering the rates of membership at synagogues and the Jewish Community Center, there is a tremendous opportunity for involving families and individuals in Jewish education experiences through camping, family education programs, Israel trips and adult learning.

A number of initiatives have begun to take form; 1) The Jewish Community Center is preparing to address this challenge through adopting a staff development program that enhances its ability to incorporate Jewish content into all areas of programming. 2) A significant portion of the Community Shaliach's time is being assigned to working with B'nai B'rith Youth Organization and the JCC in their teen programs and recruiting young people for Israel trips. 3) The Federation has entered into a partnership with synagogues to promote young people traveling and studying in Israel, through a "Passport to Israel" savings incentive program. This last effort has been stimulated through an initial endowment gift of \$100,000. It is hoped that this initial commitment will stimulate others to follow its lead. 4) Several synagogues have embarked upon active family education programs. MAJE, the JCC and a consortium of synagogues are jointly offering the Florence Melton Mimi School, a 120 hour adult education program. There are currently 66 students enrolled.

B. Scholarship Need

Evidence indicates that scholarship need, due to rising costs of education, is exceeding the resources currently available through the Federation's Campaign. A family of four, two adults and two children, earning \$40,000 - \$50,000 would need to spend approximately 25 percent of their income, or \$9,500, to affiliate with a synagogue, enroll one child in a Jewish day school and one session of camp, and enroll the other child in day care. This may ultimately result in restricting a meaningful Jewish education experience to the poorest who receive scholarships and to our most affluent families who can afford to pay for it. This would exclude the middle income group, the largest segment of our community. Our community has been fortunate in receiving an initial three year grant of \$750,000 from a private foundation to support families enrolling their children in day schools. However, fees for camping and pre-school increased an average of 5-15 percent. Education programs to Israel now range between \$3,500 and \$5,000.

C. Teacher Recruitment and Training

Recruiting and training qualified teachers and administrators is cited by JESNA as the number one problem in communities across the country. Therefore, the vast majority of available teaching positions are often filled by individuals who have not been trained as Jewish educators. Over 70 percent of the 200 Jewish classroom teachers in Milwaukee teach six hours per week or less. The number of full-time positions available are extremely limited and the salaries and benefits that are offered provide little incentive to draw qualified educators into the field. This problem is particularly acute in a smaller community like Milwaukee, where

qualified teachers must often be recruited outside the city..

The community's primary teacher resource is MAJE.. MAJE offers staff development and consultative services to schools and faculty to provide teaching,, curriculum and overall school programming.. It maintains a creativity resource center and a pedagogic library.. MAJE also provides \$21,200 in grants and incentives to encourage their own professional development through local courses and conferences.. Approximately 77 percent of the community's classroom teachers use MAJE's services.. As an agency almost completely dependent upon the Federation for its funding,, it has been seriously impacted by the Annual Campaign's decline in recent years.. The Federation is working with the agency to maintain teacher recruitment and education as a priority.. A new endowment was established this year to support teacher training,, which will have a corpus of \$100,000 by the end of 1992.. Other alternative income sources are being sought to support special projects in this area..

III. Essay - Milwaukee as a "Lead Community."

Milwaukee has demonstrated a history of commitment to improving Jewish education.. Milwaukee ranks number one among all Group II cities in its annual allocation to Jewish education.. It continues to develop and provide top leadership to Jewish education committees and task forces,, both on the local level as well as the national level.. It also participates in many of the national and international education programs that add new dimensions for Jewish learning,, such as Melitz,, CLAL,, High School in Israel,, the Florence Melton Mini Adult School,, OTZMA,, Panim El Panim and March of the Living..

Milwaukee takes great pride in what it has achieved through central planning.. In the last 10 years,, the Federation constructed a community

campus, dedicating an entire complex to Jewish education. It is unique in that it houses in one facility both a traditional Orthodox and a Reform/Conservative day school. This arrangement has resulted not only in cost savings to the community, but has enhanced each school's ability to appreciate different streams of Jewish thought. Milwaukee enjoys one of the highest day school enrollment rates in the nation. The demand is so great that last year a gift of \$500,000 was secured to build an additional wing. Milwaukee is also one of only five communities in the country to employ a Community Shaliach. Our Shaliach will focus almost one-half of his time with youth, working with BBYO and the JCC. He also will be heavily involved in promoting and recruiting teens for a wide variety of educational experiences in Israel.

Milwaukee has always aspired to be a model community. It emphasizes making Jewish education a lifelong process with an emphasis on Adult and Family Education and on improving the effectiveness of Jewish learning in both formal and informal settings. Milwaukee's primary educational goals are:

1. To extend Jewish learning beyond the Bar/Bat Mitzvah age groups by effective utilization of both formal and informal education resources such as camps, youth groups, Israel travel and joint efforts with synagogues.
2. To reduce financial barriers which limit participation in Jewish education activities, particularly among middle and lower income families.
3. To increase recruitment, training and retention of qualified personnel in all settings where Jewish education takes place.

Although our community has been seriously effected by a reduced Campaign achievement, over the last three years, several factors make our leadership

very hopeful for the future. First, over \$1.5 million has been raised in endowments to support Jewish education, over 25 percent of which has been generated in the last two years. Several other individuals have indicated an interest in creating significant new funds to support Jewish education projects. Second, a new local private foundation was established this year. One of its primary objectives is to support Jewish education. The trustees have already committed \$750,000 to the community in scholarship support for Jewish day schools over the next three years. Finally, continuing financial pressures on Jewish agencies and organizations have promoted a greater willingness to work together to address common problems. The Federation, through its Task Force on Jewish Education, hopes to cultivate these bonds and expand this partnership into the synagogues as well.

Milwaukee's leadership views Jewish education as the primary method for ensuring its own Jewish continuity. It is proud of its history and achievements and is optimistic that they have provided the foundation for an even more prosperous future.

IV. Recent Community Initiatives in Jewish Education

A number of community initiatives have already been referred to. Highlighted below are brief descriptions of the community's joint scholarship process and its Passport to Israel program which we believe are particularly promising.

A. Joint Scholarship Process

In 1989 the Federation established a policy that the community's support for day school scholarships should not be based upon philosophical approaches to Jewish education or different tuition rates charged by individual schools. In the last two years it has implemented a joint scholarship process that collects applications from families and distributes support to schools based

upon financial need utilizing a standard scale for what families can pay. Initially this process was restricted to determining scholarship support for those families enrolling their children in the two Federation-supported Jewish day schools. With the support of a \$750,000 three year grant from a newly established private foundation, this process has been expanded to include two Milwaukee day schools not accorded Federation agency status. Last year \$722,030 was awarded in scholarships to 187 families, with an average grant of \$3,900 per family. This represents a 26 percent increase in the number of scholarships and an 8 percent increase in the average grant awarded.

B. Passport to Israel Savings Incentive Program

Milwaukee is one of 10 communities in the country that has initiated a "Passport to Israel" savings incentive program. The program stipulates that the Federation will match annually \$100, for every child, beginning in third grade, along with an equal contribution from the child's synagogue and family towards an accredited Israel experience when the child reaches high school. This program is being supported through an initial endowment of \$100,000. The program also includes a course of study, that is being prepared by the Milwaukee Association for Jewish Education. It begins at the third grade level and continues until the child travels to Israel. With over 200 children currently enrolled at the third grade level this year, it is hoped that other donors will be motivated to expand this fund.

UKELES ASSOCIATES INC.

611 Broadway, Suite 505

New York, NY 10012

Tel: (212) 260-8758

Fax: (212) 260-8760

FACSIMILE COVER SHEET

Date: March 9, 1992

Pages (including cover) 11

To: ,

Name Annette Hochstein

Fax #: (011) 972-2-619511

From:

Name Jack Ukeles

If there is a problem with this transmission please call:

Gail at (212) 260-8758

Message: Attached is the revised workplan and budget for Lead Communities Phase 2.
I'll call you in the morning.

MEMORANDUM

To: Annette Hochstein

From: Jack Ulaties *Jack*

Date: March 10, 1992

Subject: 1 enclosed

=====

I enclose a draft of a memo to Steve with a revised workplan/ budget summary for Phase II of UAI planning support for the Lead Communities Project. This is for our discussion tomorrow.



April 20, 1992

The Lead Communities Project::

Alternative Strategies and Estimated Resource Requirements

1. BACKGROUND

Given the large number of applications to the Lead Communities project and the resulting opportunities, the leadership of the CIJE decided to take a pause in the selection process and consider alternative courses of action towards implementation. Of prime interest was the notion that the response to the selection process might offer large-scale opportunities for development that had not been considered so far ((see memo of April 13, 1992)). Preliminary discussions and consultations raised several issues in regard to large scale development, primarily issues of human and financial resources. As a result staff and consultants decided to reconvene following the preparation of a projection of estimated resources required for the whole project ((staff meeting of April 14th)).

There are several possible courses of action towards implementation. In the analysis that follows we discuss three alternatives and their implications:

2. ALTERNATIVES

A. Maximizing option::

Seize the emerging opportunity in order to involve all applicants and beyond in a large-scale, continental effort to improve Jewish education in accordance with the agenda set forth by the Commission on Jewish Education in North America. In addition to selecting a small number of lead communities, form a coalition of applicant communities and link them with purveyors of programs (e.g. JESNA, JCCA, training institutions) in an effort to engage them all in the implementation of selected elements of profession building, community mobilization and Israel experience.

B. Original option::

Proceed with the selection of Lead Communities as originally proposed. 3 Lead Communities will be selected within the next 4 months through a two-round selection process. The Lead Communities will engage in a five year program for large scale improvement effort of their Jewish education. The communities will be invited to join a national planning seminar for the detailed design of the project. This seminar of the three communities selected, will be undertaken under the leadership of the CIJE,

and will take place in parallel to the local planning process, the self-study and initial pilot programs. Full-scale implementation will follow this first phase.

C. Mixed option:

1. Proceed with the selection of Lead Communities as originally proposed. 3 Lead Communities will be selected during the next 4 months through a two-round selection process. The Lead Communities will engage in a five year program for large scale improvement effort of their Jewish education. (see (B) above).

2. In order not to lose the momentum and interest generated by the project, undertake a limited version of option (A). Select one or two programs for implementation by all the applicant communities and bring about their implementation (e.g. a program with CLAL for lay leadership training in Jewish education; or a program with the training institutions for the in-service training of supplementary school principals). This initiative, appropriately communicated to the Jewish community at-large, could maintain the interest in the educational endeavor and hopefully energize others to undertake or offer similar programs. If successful such programs may be the beginning of larger initiative to come.

Note: For alternatives B and C a brief review of the selection criteria should be undertaken, to ascertain that they are commensurate with current perceptions. In addition the timetable will need to be revised in light of the three-week interruption in the selection process.

3. RESOURCES REQUIRED

a. Financial resources

Cost figures were reached by estimating the price for the various elements of the project. Since there is a wide margin of uncertainty, the summary figures offered here should be seen as no more than ballpark figures offered for discussion purpose.

The overall financial resources required for each of the above options differ markedly from each other. However the range of costs to the CIJE is not as wide as might be assumed. It is estimated that each option will require as follows:

- * full staffing of the CIJE or staffing equivalents (e.g. staff planner or planning consultant);
- * the Best Practices project and
- * the Monitoring and Evaluation project;
- * funding for expert consultants,
- * staff-travel, and meetings.

The estimated cost for these plus overhead is \$750,000 to \$1,200,000 per year. The maximizing option carries more expert-

consultation, more assistance to purveyors,, more overhead and travel costs than the other two and therefore would come closer to the top of the range.

The above figures do not include seed money to communities.. They may suffice for purveyors of programs.. Indeed we estimate that some seed money would be required for purveyors and that some will certainly be required for Lead Communities.. However amounts differ markedly with the following assumptions::

1. that purveyors -- many of whom are keen to attract clients -- will view the opportunity to work with the communities as most welcome,, and will therefore carry out the work,, and charge only the clients for service.. They may require no more than a small incentive grant.. Assuming six programs during the first year and an incentive grant of about \$50,000 to each,, \$300,000 would be required..

2. That purveyors will not go along unless heavily subsidized -- in which case the amount could be significantly higher.. This would have to be resolved in negotiations with the various actors,, purveyors and foundations..

The range of 750,000 to 1,200,000 should certainly cover options (B) and (C)..

B.. Human Resources

Doing the work::

Each of the alternatives requires a significant amount of staff work by the CIJE. However,, unlike the cost issue,, the demands of the various alternatives differ markedly from each other,, with the maximizing option demanding far more human resources than the other two options..

What needs to be done?

We will refer only to the work required by the alternatives beyond the three lead communities and ongoing CIJE work..

The maximizing option (A) requires:: to plan the project and coordinate it; to undertake extensive community relations,, to work with agencies and purveyors towards the design of specific program elements and their implementation; to run a year long ongoing planning seminar with Communities; to coordinate implementation and communicate with all concerned; to ensure an effective planning process,, and ensure the content and quality implementation of programs through an ongoing consultative process with all involved (purveyors and communities).. To launch a monitoring and evaluation process for all involved..

Let us look at some of these in more detail. For example, "to undertake extensive community relations" involves the following::

Intensive initial staff work to brief and poll all 23 communities,, all CIJE Board members,, more than a dozen purveyors of

programs and national agencies; foundation principals and staff; other interested parties such as Commission members.. Extensive ongoing management of this process..

"to ensure an effective planning process" would require that the CIJE engage consultants and train them for work with communities and purveyors of programs.. They would then be sent to communities to help with the planning process,, give guidance and expert-advice when needed.. They would also identify further needs and may call in people with specific expertise to help with the development of specific programs..

"to launch a monitoring and evaluation process for all involved" would require to ask the Monitoring and Evaluation project (Adam Gamoram) to develop a method for ongoing self-monitoring and evaluation by participating communities.. Community staff would have to be trained and supervised in this work..

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* * * * *

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April 20, 1992

U 'C - 'Sse
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* * * * *

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the various alternatives ahead of us.

CONFIDENTIAL

April 13,, 1992

To: MLM

From: AH and SF

Re: Lead Communities re-visited:

Towards a strategy for implementation

1. The public recruitment of candidates for the Lead Communities project of the CIJE was completed last week. Twenty-three communities have completed the application process -- out of a total of 57 eligible communities. Together the 23 represent approximately 1.5 million Jews throughout the North American continent, or about 26% of the Jewish population (Exhibit 1). While many among us had expected substantial response to the recruitment process, we had not expected the scope and the quality of the response. Thus our feeling that the improvement of Jewish education is a topic whose time has come, a topic that elicits positive responses and expressions of significant need on the one hand and desire for action on the other.

2. At our meeting in Amsterdam last Sunday, we considered the possible implications of this very large response to the project, above and beyond the selection and implementation of Lead Communities. Following a reading of applications we came to several preliminary thoughts::

a. While the selection process of Lead Communities and the work with these moves ahead as planned, should we not consider additional opportunities arising from the impressive response to recruitment efforts. The applications suggest a possible opportunity to build, in addition, upon a far larger potential target population, to also work with sizable human and material resources and commitments, and to learn as we go.

b. Proposals convey that in three areas at least the community-at-large may be ready for implementation of the Commission's decisions.

1. commitment to Jewish education, including leadership and resource allocation;
2. studies and analyses of the local situation;
3. the establishment of broad coalitions and a process involving lay leadership and professionals, communal organizations and congregations, formal and informal educational programs. Communities report on a variety of sophisticated commissions, committees, study groups, task forces, several of which

have been at work for one,, two or even more years, taking stock of the local situation and of educational needs..

c. Applicant communities suggest expanding their own resource allocation to Jewish education.. In spite of economic difficulties they do not suggest cutting resources and several write of expanding these.. Very few include conditional requests for support..

d. Viewed in the aggregate applicant communities touch upon all the elements and programmatic areas viewed by the Commission as being conditions for systemic improvement and change.. For example most mention the shortage of qualified personnel as a key problem and often add details from training to salary improvement.. Many write of the need for in-service training.. Much of this is presented in the language of the Commission..

e. At the same time many communities place their energy in important but secondary programs ((e.g.. holocaust studies) rather than in the improvement of basic programs ((e.g.. supplementary schools)).. Though we have not studied the cause for this, it may be that communities have little hope of solving major problem areas..

4. In light of this analysis,, it is possible that in addition to the lead communities project,, now is the time for a major continental effort for the improvement of Jewish education.. We should perhaps consider working with all the applicant communities.. These 23 communities could build a coalition for macro-change in Jewish education;; a coalition for the mobilization of human resources and for the development of the profession of Jewish education.. Conceivably several more communities may be interested to join when the program is fully articulated.. We may find that Foundations will be willing to follow the lead or join the plan.. If we pool the organizational ability and resources of organizations such as CJF, JESNA, the JCCA; CLAL, the training institutions,, the denominational education commissions, would we not begin the process of systemic change.. We find that there is a lot of wisdom and potential for action that is mobilizable at the present time..

5. Following careful consideration of implications we may want to engage the 23 applicant communities in joining the CIJE for taking critical planning and selection decisions, as well as for participating in a broader-based project than originally envisioned.. The communities themselves may be engaged in the selection of Lead Communities, as planned..

6. Engaging them might lead to modifications in our work strategy.. For example we may now consider a strategy that would include several levels of implementation, -- the most extensive of which will be the 3-5 planned and full-fledged Lead Communities.. To illustrate:

* 20 communities from among the 23 applicants may want to join the CIJE for limited efforts (e.g. in-service training for all their principals and a serious training program for their lay leadership)..

* 12 communities may want to join a more intensive, but still limited project (e.g. in-service programs for all their educators; Israel incentives savings plans; an increase in travel to Israel; a major maximizing change in their JCC..).

* And finally those becoming Lead Communities for a long-term in-depth program of systemic change might be a self-selected group of very committed and appropriate communities willing to move beyond the above scope of endeavor and to be the vanguard for systemic change..

* The communities themselves might lead the selection process through participation in a continental planning seminar convened by the CIJE at which both the process and the content will be designed..

7. There are major potential advantages to such a pooling of effort::

a. the critical mass and power generated by this network will open possibilities that are not available to single communities, e.g. training institutions may be willing to commit their resources to the implementation of special programs because of the large populations involved.

b. this coalition of communities will allow to combine the wisdom of all participants, and one anticipates that much mutual learning and support could take place in the design and development process..

c. The climate throughout the communities and perhaps even throughout North America might be significantly affected.

8. The implementation of a program of such scope would raise major challenges of content and resources. The required organizational, staffing, management, and funding resources, need to be carefully estimated and planned, their feasibility assessed. Preliminary thoughts in this area include:

a. A program of this kind goes beyond the initial assignment of the CIJE. Its success depends among other on the CIJE and its leadership's ability to recruit, pool and manage varied resources. So for example CLAL may be the address for the leadership training endeavors; JESNA may take on much of the communications, dissemination and coordination effort with communities; CAJE could offer specially designed programs for educators; training institutions in North America and in Israel could under-

take the design and development of in-service training programs -- some in conjunction with their MAF training grants.

b. Foundations might respond to a call to give priority to the participating communities. This may be true for the CRB Foundation in Israel programs; for the Cummings Foundation in ~~helping~~ ~~supplementary~~ ~~school~~ improvement efforts; for the Revson Foundation in the use of communications technology; for Hausdorf's Foundation in helping day schools; the Blaustein Foundation for research, etc...

c. Funding will be required of communities themselves, and indications are that communities may be willing to fund participation in good programs. It may well be that ability/willingness to fund participation will be a key factor in communities' decision to participate in the first, second or third tier of the program.

d. The CIJE itself will coordinate and manage this whole process, lending it expertise and leadership. Now may be the time to re-visit SHH's notion of creating the "Fellows of the CIJE", a group of perhaps 20-30 experts (mostly successful educators or academics with field experience) who would be available as consultants to communities in their planning and implementation efforts and would also act as a professional advisory group to the CIJE.

The internal funding needs of the CIJE will be planned and reviewed -- including funds for its own staff and consultants or for seed-money that may be required.

e. A fundraising and funding strategy needs to be developed at this time.

9. In light of this analysis, MLM decided to convene a consultation meeting in New York City on May 3rd, 1992 to consider alternative strategies for implementation. At that meeting assumptions that have guided the project would be reviewed and alternatives discussed with a view of maximizing the impact of the present momentum, and bringing about implementation of the commission's recommendations. The overall concept will not be changed (Lead Communities as a means for in-depth change and improvement); nor will the timetable change (Launching the project following the Board Meeting of August 25, 1992). The process and extent of involvement may change.

10. Participants in such a meeting would include MLM and staff, Chuck Ratner (chair of the CIJE's Lead Community Committee), possibly additional members of that committee. lay and professional heads of the partner organizations (CJF, JESNA, JCCN) and possibly CIJE consultants. (Exhibit 2).

11. The agenda of the meeting would consist of a consideration of alternative strategies.. I will prepare a further document following your instructions and consultations with staff..

12. AA "Camp" process (members off the CUE Board; Lead Communities Committee) and a communications program should precede the meeting.. Communities need to be effectively briefed ((to preempt rumors and build anticipation)).. Conclusions and possibly decisions would be communicated to applicant communities possibly by May 5th as originally planned..

EXHIBIT 1

CUE LEAD COMMUNITIES Pre-Proposal Application				
	Date	State	City	Jewish Pop
1	03/25/92	BC	Vancouver	20,000
2	03/27/92	WI	Milwaukee	28,000
3	03/30/92	CA	San Diego	42,000
4	03/30/92	MAN	Winnipeg	14,800
5	03/30/92	MD	Baltimore	94,500
6	03/30/92	MO	Kansas City	19,100
7	03/30/92	NJ	Metro West	121,000
8	03/30/92	NY	Rochester	25,000
9	03/30/92	OH	Columbus	15,000
10	03/30/92	ONT	Toronto	135,000
11	03/31/92	CO	Denver	46,000
12	03/31/92	DC	Washington	165,000
13	03/31/92	FL	Palm Beach County	65,000
14	03/31/92	FL	South Palm Beach County	52,000
15	03/31/92	GA	Atlanta	67,000
16	03/31/92	MA	Boston	200,000
17	03/31/92	NY	New York/Suffolk	98,000
18	03/31/92	PQ	Montreal	95,000
19	03/31/92	RI	Rhode Island	17,500
20	03/31/92	TX	Dallas	36,900
EXTENSIONS GIVEN TO THE COMMUNITIES LISTED BELOW				
21	04/02/92	CT	Hartford	26,000
22	04/02/92	ONT	Ottawa*	13,500
23	04/06/92	CA	Oakland	35,000

* not eligible

1,454,300 (CJF)

[according to the applications 1,563,325]

Exhibit 2

POSSIBLE PARTICIPANTS IN MAY 3RD MEETING, NEW YORK

MLM

HLZ

Shulamith Elster

Chuck Ratner

Stanley Horowitz

Annette Hochstein *

Ginny Levi

Steve Hoffman

Art Rotman

Jon Woocher

Marty Kraar

The Presidents of JCC, JESNA and CJF

Art Naparstek

Barry Holtz

Jack Ukeles

David Finn

CENTER FOR THE ADVANCED STUDY OF EDUCATIONAL LEADERSHIP
PEABODY COLLEGE OF
VANDERBILT UNIVERSITY
NASHVILLE, TN 37203

TELEFACSIMILE COVER SHEET

SENDER: Emileir Goldring

DATE: Aug 12, 1992

Fax Number: (615) 343-7094
Phone Number: (615) 343-7092
3 a a-pc 37 (fci) 615-251-1770 &

Number of pages: 4
(including cover page)

Sent to: Annette He'-KfJIA^

Location: To the Yuff*Alia

Fax Number: 072 2-619951

Phone Number:

DAL* 11%At's,
& 7 h^XA&Yvr/ on Bitnet. at this point I have not heard
about an agenda for the process. I am ahead and
/rwjj a brief outline of M & a & E L. I will
(1/1/92) 0) & K* presented. Comments welcome.
ellen

To: Annette H. H. H.

MONITORING, EVALUATION, AND FEEDBACK IN LEAD COMMUNITIES

I. WHY DOES THE LEAD COMMUNITIES PROJECT NEED EVALUATION?

- 1. Provide information about the extent to which the lead communities have succeeded in creating better structures and processes for Jewish education.**
- 2. Provide information so decisions can be made about how to encourage other cities to emulate the programs developed in lead communities.**
- 3. Document the processes, efforts, programs, and impact of the CIJE lead communities project.**
- 4. Provide ongoing, timely information during the processes of planning and implementation.**
- 5. Provide an open exchange of experiences, ideas, information, and successes among lead communities.**

II. WHAT ARE THE OBJECTIVES OF THE MONITORING AND EVALUATION PLAN?

- 1. Carry out ongoing monitoring of progress in the lead communities in order to assist community leaders, planners and educators in their daily work.**
- 2. Evaluate progress in lead communities in terms of the impact and effectiveness as well as suitability for replication.**
- 3. Provide a continuous feedback loop between local and central planning bodies and practitioners in the field so ongoing adaptation can occur.**
- 4. Provide a basis of comparison of programs and successes in lead communities to generate ideas about how programs can best proceed.**

FIRST YEAR FOCUS: THREE SPECIFIC OBJECTIVES

- 1. Stimulate and assist the planning process**
- 2. Enumerate the goals that lead communities intend to address**
- 3. Identify current practice so that progress towards goals can be addressed in the future.**

III. WHAT IS THE CONTENT OF THE MONITORING AND EVALUATION PLAN?

- 1. What is the process of change in lead communities?**
- 2. What is the outcome of change in lead communities?**

FIRST YEAR FOCUS: THREE SPECIFIC QUESTIONS:

- 1. What are the visions of change in Jewish education held by members of the community?**
- 2. What is the extent of community mobilization for Jewish Education?**
- 3. What is the nature of the professional life of educators in this community?**

IV. WHAT ARE THE METHODS OF MONITORING AND EVALUATION?

- 1. A team of field researchers (two will live in the lead communities) will accompany the lead communities project.**
- 2. They will document the processes and products of change in the lead communities through observations, interviews and documents.**
- 3. They will supplement community self-studies with data to provide a baseline of information about the community.**
- 4. They will attend meetings in the communities.**
- 5. They will assist in the selection and collection of survey data (years 2 and 3).**
- 6. They will report on a regular basis to provide feedback for participants in the lead communities.**

**THE LEAD COMMUNITIES &
THE INSTITUTIONS OF HIGHER LEARNING**

AGENDA

Meeting of August 19, 1992 -- Cleveland

1. Lead Communities -- Overview
2. Goals/Visions for Lead Communities
3. Best Practices and Monitoring, Evaluation, Feedback
4. The Role of the Institutions of Higher Jewish Learning
 - a. In-service training programs
 - b. Pre-service training programs
 - c. Best Practices
 - d. Other
5. Next steps

I introduce

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What if is they can do best
The November
Seminar*

*Next
Meeting*

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MFF



Rough Draft
8/26/92

Memorandum of Understanding

Agreement made this ____ day of ____, 1992 between the Council for Initiatives on Jewish Education (CIE hereafter), and _____ [Atlanta, Baltimore, Milwaukee] Jewish Federation (the Lead Community hereafter), to establish the Jewish Community of _____ Atlanta, Baltimore, Milwaukee] as a Lead Community for Jewish educational excellence.

1. PURPOSE

Whereas, the best way to generate positive change at the continental scale is to mobilize the commitment and energy of local communities, the CIE has invited the Jewish communities of Atlanta, Baltimore and Milwaukee to participate in a joint local-continental collaboration for excellence in Jewish education, called the Lead Communities Project.

The purpose of this memorandum is to set forth the mutual expectations of the two signatories with regard to the implementation of the Lead Communities Project in _____ [Atlanta, Baltimore, Milwaukee].

2. SCOPE

The Project is to be implemented in two phases: a Planning Phase and an Action Phase.

The parties hereto do agree as follows:

During the Planning Phase, the Lead Community agrees to:

- Establish a Lead Community Committee to oversee the project. The Committee will be made up of top community leadership representing all aspects 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 a major communal lay leader. *name*
- 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, students), educators, board members and Rabbis.
- Appoint a Lead Communities Planning Director (at least 1/2 time for one year)

10/1/92 ?

- Develop a one-year plan for the improvement of Jewish education -- including a needs assessment, mission or vision statement, program priorities, and plan for financial and human resource development and allocation.
- Develop a five year Plan for the improvement of Jewish education -- including *monitors at building the first group, content, quality*
- Integrate the findings of the Best Practices Program appropriate to the Lead Community. (see below).
- Identify and begin one or more experimental programs within the first year.
- P [^] ^ ^ r4Wk / ^{ipvTSI} ^{■ A?r -1}
- Utilize the results of the CIJE monitoring, evaluation and feedback project.

During the Planning phase, CUE agrees to:

- Offer examples of good programs and experience through the Best Practices Project. Best practices will be identified in: 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.
- Provide ^{expert} technical assistance in planning and educational development. The community will have access to up to XXX hours of assistance from a Talent Bank or roster of experts provided by CUE (At no cost to the community).
- Introduce potential funders to the community -- including continental foundations interested in specific project areas.
- Develop and implement a monitoring, evaluation and feedback system ^v ^{Ap} ^{the community} ^{to use} ^{fojj} ^{bttfPv-} ^{one project will serve the community}
- Convene lead communities for periodic meetings on common concerns. ^{1000 City}

ISSUE: (include Action Phase in this agreement or only the Planning Phase?)

During the Action phase, the Lead Community agrees to:

- Commit additional financial resources to Jewish education.
- Appoint a full-time Lead Communities Director

During the Action phase, CIJE agrees to:

- ?

ISSUE: Define how the community and CIJE will work together?

ISSUE: CIJE Role in relation to community plans -- agree to? participate in developing?

1. The Planning Seminar
2. links to Purveyors

3. TERM

This Memorandum shall be effective as of the day and year first written above, and shall expire two years after such commencement date, unless the agreement is sooner terminated as provided hereinafter. This Agreement may be terminated by reason of any failure in the performance of this Agreement by one of the parties or by failure to comply with any of the terms and conditions of this agreement. The effective date of the termination of this agreement shall not be less than 30 days after written notice of the intent to terminate; such notice shall include the reasons for such termination.

IN WITNESS WHEREOF, the parties hereto have caused this agreement to be signed the day and year first written above.

CIE

Federation

By: _____

By: _____

Title:

Title:

Date: _____

Date: _____

LEAD COMMUNITIES AT WORK

A. INTRODUCTION

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

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

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

B. THE SCOPE OF THE PROJECT

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

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

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

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

- Supplementary Schools
- Day Schools
- JCCs
- Israel programs
- Early Childhood programs

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

- Adult learning
- Family education
- Summer camping
- Campus programs
- etc....

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

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

C. VISION

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

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

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

1. At the communal level the leadership will develop and articulate a notion of where it wants to be, what it wants to achieve.

2. At the level of individual institutions or groups of institutions of similar views (e.g., all Reform schools), educators, rabbis, lay leaders and parents will articulate the educational goals.

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

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

D. BUILDING THE PROFESSION OF JEWISH EDUCATION

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

1. Hire 2-3 additional outstanding educators to bolster the strength of educational practice in the community and to energize thinking about the future.

2. Create several new positions, as required, in order to meet the challenges. For example: a director of teacher education or curriculum development, or a director of Israel programming.

3. Develop ongoing in-service education for most educators in the community, by programmatic area or by subject matter (e.g. the teaching of history in supplementary schools; adult education in community centers).

4. Invite training institutions and other national resources to join in the effort, and invite them to undertake specific assignments in lead communities. (E.g. Hebrew Union College might assume responsibility for in-service education of all Reform supplementary school staff. Yeshiva University would do so for day-schools).

5. Recruit highly motivated graduates of day schools who are students at the universities in the Lead Community to commit themselves to multi-year assignments as educators in supplementary schools and JCCs.

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

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

E. DEVELOPING COMMUNITY SUPPORT

This will be undertaken as follows:

1. Establishing a wall to wall coalition in each Lead Community,, including the Federation,, the congregations,, day schools,, JCCs,, Hillel etc..
2. Developing a special relationship to rabbis and synagogues.
3. Identify a lay "Champion" who will recruit a leadership group that will drive the Lead community process..
4. Increase local funding for Jewish education.
5. Develop a vision for Jewish education in the community.
6. Involve the professionals in a partnership to develop this vision and a plan for its implementation..
7. Establish a local implementation mechanism with a professional head.
8. Encourage an ongoing public discussion of and advocacy for Jewish education..

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

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

1. Best Practices

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

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

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

It works in the following way:

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

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

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

2. Monitoring Evaluation Feedback

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

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

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

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

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

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

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

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

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

3. *Professional services:*

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

a. Educational consultants to help introduce best practices.

b. Field researchers for monitoring, evaluation and feedback.

- c. Planning assistance as required.
- d. Assistance in mobilizing the community.

4. Funding facilitation

The CIJE will establish and nurture contacts between foundations interested in specific programmatic areas and Lead Communities that are developing and experimenting with such programs (e.g., the CRB Foundations and youth trips to Israel; MAF and personnel training; Blaustein and research)..

5. Links with purveyors or supporters of programs

The CIJE will develop partnerships between national organizations (e.g., JCCA, CLAL, JESNA, CAJE), training institutions and Lead Communities. These purveyors will undertake specific assignments to meet specific needs within Lead Communities.

G. LEAD COMMUNITIES AT WORK

The Lead Community itself will work in a manner very similar to that of the CIJE. In fact, it is proposed that a local "CIJE" be established to be the mechanism that will plan and see to the implementation and monitoring of programs.

What will this local mechanism (the local planning group) do?

- a. It will convene all the actors;
- b. It will launch an ongoing planning process and
- c. It will deal with content in the following manner.
 1. It will make sure that the content is articulated and is implemented.
 2. Together with the team of the Best Practices project and with the Chief Education Officer, it will integrate the various content and programmatic components into a whole. For example: it will integrate formal and informal programs.

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

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

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

H. LAUNCHING THE LEAD COMMUNITY -- YEAR ONE

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

1. Negotiate an agreement with the CIJE including:
 - a. Detail of mutual obligations;
 - b. Process issues -- working relations within the community and between the community, the CIJE and other organizations
 - c. Funding issues;
 - d. Other..
2. Establish a local planning group,, with a professional staff and with wall-to-wall representation..
3. Gearing-up activities, e.g., prepare a 11-year plan, undertake a self-study ((see 6 below)), prepare a 5-year plan..
4. Locate and hire several outstanding educators from outside the community to begin work the following year ((1993/94))..
5. Preliminary implementation of pilot projects that result from prior studies,, interests,, communal priorities..
6. Undertake an educational self-study,, as part of the planning activities::

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

- a. Assessment of needs and of target groups ((clients)).
- b. Rates of participation..
- c. Preliminary assessment of the educators in the community ((e.g., their educational backgrounds))..

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

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

★ ★ ★ ★ ★ ★ ★ ★ ★ ★

August 10,, 1992

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initiatives to improve the personnel situation. For example it works with foundations to expand and improve the training capability for Jewish educators in North America.

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

c. The feedback-loop: findings of monitoring and evaluation activities will be continuously channeled to local and CIJE planning activities in order to affect them and act as an ongoing corrective. In this manner there will

be a rapid exchange of knowledge and mutual influence between practice and planning. Findings from the field will require ongoing adaptation of plans. These changed plans will in turn, affect implementation and so on.

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

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

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

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

3. Professional services:

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

- a. Educational consultants to help introduce best practices.
- b. Field researchers for monitoring, evaluation and feedback.
- c. Planning assistance as required.
- d. Assistance in mobilizing the community.

4. Funding facilitation

The CIJE will establish and nurture contacts between foundations interested in specific programmatic areas and Lead Communities that are developing and experimenting with such programs (e.g., the CRB Foundations and youth trips to Israel; MAF and personnel training; Blaustein and research).

5. Links with purveyors or supporters of programs

The CIJE will develop partnerships between national organizations (e.g., JCCA, CLAL, JESNA, CAJE), training institutions and Lead Communities. These purveyors will undertake specific assignments to meet specific needs within Lead Communities.

G. LEAD COMMUNITIES AT WORK

The Lead Community itself will work in a manner very similar to that of the CIJE. In fact, it is proposed that a local "CIJE" should be established to be the mechanism that will plan and see to the implementation and monitor the programs. What will this local mechanism (from hereonin: "the local planning group") do?

- a. It will convene all the actors;
- b. It will launch an ongoing planning process; and
- c. It will deal with content in the following manner.

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

2. Together with Barry Holtz and his team, and with Shulamith Elster integrate the various content components and programmatic components into a whole. For example: integrate formal and informal programs. In terms of the Israel Experience that the vision piece, the goals, are articulated by the various actors and at the various levels:
 - by individual institutions
 - by the denominations
 - by the community as a whole.

In addition, dealing with the content will involve having a "dream department" or "blueskying unit," aimed at dealing with innovations and change in the programs in the community (see Barry Holtz' paper).

H. LAUNCHING THE LEAD COMMUNITY -- YEAR ONE

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

- I. Negotiate an agreement with the CIJE that includes:
 - a. Detail of mutual obligations;

b. Process issues -- working relations within the community and between the community, the CIJE and other organizations

c. Funding issues;

d. Other..

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

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

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

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

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

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

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

b. Rates of participation.

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

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

Some of the definition of the study and some of the data collection will be undertaken with the help of that project's field V3 researcher.

* * * * *

August 1, 1992

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

I. CONTENT

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

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

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

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

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

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

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

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

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

As part of their applications lead communities are proposing planning processes for the first year of work. In studying mobilization in the communities, we need to observe how this planning process unfolds. Is the stated design followed? Are departures from initial plans helpful or harmful? Is there broad participation? Are the planners developing thoughtful materials? We will need to describe the decision-making process. Is it open or closed? Are decisions pragmatic or wishful?

The professional lives of Jewish educators. Enhancing the profession of Jewish education is the second critical building block specified in *4 Time to Act*. The Report claims that fundamental improvement in Jewish education is not possible without radical change in areas such as recruitment, training, salaries, career tracks, and empowerment of educators. Hence, the evaluation project will establish baseline conditions which can serve as standards for comparison in future years.

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

II. METHODS

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

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

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

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

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

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

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

*Make comment
re-sense language that
careful planning* **LXJ^** *must respond to
the context of Time To Act*
PLANNING LEAD COMMUNITIES

1. It is assumed that 3 to 5 lead communities will be selected by early summer 1992..

2. Following their selection a planning process will be launched.. Its purpose will be to ensure that the communities' will, priorities, and needs are being addressed effectively within the context of the Commission's vision for the improvement of Jewish education..

3. The need to translate the vision into prescriptions for practice without losing sight of reality of quality, content and scope -- CUE + Lead Communities jointly..

4. Two assumptions inform the proposed planning process::

a. The CIJE has made explicit the requirement that Lead Communities undertake an action program of a scope, quality and content that are ~~most~~ likely to bring significant change..

b. At the same time it is understood that only communities themselves can design plans likely to truly respond to their specific local situation..

5. In order to ensure the appropriate translation of visions and needs into programs a two tier planning process is being recommended.. It will take place both nationally and locally..

21 6. Each Lead Community will set up its own planning process.. The process will include a representative planning committee and will be professionally staffed..

121 7. The CUE will invite 2-3 representatives of each lead community (the lay chair, the planner and the federation professional) to join a continental Lead Community planning Committee.. The purpose of this process will be to develop and refine the concept of lead communities within the context of real-life communities.. The planning committee will consider issues such as::

8. These two planning processes (the local and the continental one) will inform each other.. They will continue for at least a year

*sense of urgency
at same time*

July 7, 1992

LEAD COMMUNITIES AT WORK

A. INTRODUCTION

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

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

B. THE SCOPE OF THE PROJECT

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

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

2. The Lead Community project will involve all or most Jewish education actors in that community. It is expected that lay

leaders,, educators,, rabbis and heads of educational institutions of all ideological streams and points of view will participate in the planning group of the project,, to shape it,, guide it and take part in decisions..

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

- Supplementary Schools
- Day Schools
- JCCs
- Israel programs
- Early Childhood programs

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

- Adult learning
- Family education
- Summer camping
- Campus programs
- etc...

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

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

C. VISION

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

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

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

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

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

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

D. BUILDING THE PROFESSION OF JEWISH EDUCATION

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

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

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

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

E. DEVELOPING COMMUNITY SUPPORT

This will be undertaken as follows::

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

2. Developing a special inclusive relationship to rabbis and synagogues..

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

4., Increase local funding for Jewish education..

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

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

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

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

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

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

1. Best Practices

A project to create an inventory of good Jewish educational practice was launched.. The project will offer Lead Communities

examples of educational practice in key settings,, methods,, and topics,, and will assist the communities in "importing,, "translating,, "re-inventing" best practices for their local settings..

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

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

It works in the following way:

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

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

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

2.. Monitoring Evaluation Feedback

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

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

b. to evaluate progress in Lead Communities -- assessing,, as time goes on,, the impact and effectiveness of each program,, and its suitability for replication elsewhere.. Evaluation will be conducted by a variety of methods.. Data will be collected by the local researcher.. Analysis will be the responsibility of the head of the evaluation team with two purposes in mind: 1) To evaluate the effectiveness of individual programs and of the Lead Communities themselves as models for change,, and 2) To begin to create indicators ((e.g., level of participation in Israel programs;; achieve-

ment in Hebrew reading) and a database that could serve as the basis for an ongoing assessment of the state of Jewish education in North America. This work will contribute in the long term to the publication of a periodic "state of Jewish education" report as suggested by the Commission.

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

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

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

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

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

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

3. Professional services:

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

a. Educational consultants to help introduce best practices.

- b. Field researchers for monitoring,, evaluation and feed-back.
- c. Planning assistance as required.
- d. Assistance in mobilizing the community..

4. Funding facilitation

The CIJE will establish and nurture contacts between foundations interested in specific programmatic areas and Lead Communities that are developing and experimenting with such programs (e.g., the CRB Foundations and youth trips to Israel; MAF and personnel training; Blaustein and research)..

5. ~~Links with purveyors or supporters of programs~~

The CIJE will develop partnerships between national organizations ((e.g., JCCA,, CLAL,, JESNA,, CAJE)) ,, training institutions and Lead Communities.. These purveyors will undertake specific assignments to meet specific needs within Lead Communities..

G. LAUNCHING THE LEAD COMMUNITY -- YEAR ONE

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

1. Negotiate an agreement with the CIJE that includes:
 - a. Detail of mutual obligations;
 - b. Process issues -- working relations within the community and between the community,, the CIJE and other organizations
 - c. Funding issues;
 - d. Other.
2. Establish a local planning group,, with a professional staff, with wall-to-wall representation.
3. Gearing-up activities,, e.g., prepare a 1-year plan, undertake a self-study ((see 6 below)), prepare a 5-year plan.
4. Locate and hire several outstanding educators from outside the community to begin work the following year ((1993/94))..
5. Preliminary implementation of pilot projects that result from prior studies,, interests,, communal priorities.

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

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

- a. Assessment of needs and of target groups (clients).
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July 2, 1992

LEAD COMMUNITIES AT WORK

A.Hochstein and S. Fox

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2. Identify a lay "Champion" who will recruit a leadership group that will drive the Lead community process.
3. Increase local funding for Jewish education.
4. Develop a vision for Jewish education in the community.
5. Involve the professionals in a partnership to develop this vision and a plan for its implementation.
6. Establish a local implementation mechanism with a professional head.
7. Encourage an ongoing public discussion of and advocacy for Jewish education.

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

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

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b. to evaluate progress in Lead Communities -- assessing,, as time goes on,, the impact and effectiveness of each program,, and its suitability for replication elsewhere.. Evaluation will be conducted by a variety of methods.. Data will be collected by the local researcher.. Analysis will be the responsibility of the head of the evaluation team with two purposes in mind: 1) To evaluate the effectiveness of individual programs and of the Lead Communities themselves as models for change,, and 2) To begin to create indicators ((e.g., level of participation in Israel programs; achieve=

ment in Hebrew reading)) and a database that could serve as the basis for an ongoing assessment of the state of Jewish education in North America. This work will contribute in the long term to the publication of a periodic "state of Jewish education" report as suggested by the Commission.

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

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

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

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

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

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

3. Professional services:

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

a. Educational consultants to help introduce best practices.

b. Field researchers for monitoring, evaluation and feedback.

c. Planning assistance as required.

d. Assistance in mobilizing the community.

4. Funding facilitation

The CIJE will establish and nurture contacts between foundations interested in specific programmatic areas and Lead Communities that are developing and experimenting with such programs (e.g., the CRB Foundations and youth trips to Israel; MAF and personnel training; Blaustein and research).

5. Links with purveyors or supporters of programs

The CIJE will develop partnerships between national organizations (e.g., JCCA, CLAL, JESNA, CAJE), training institutions and Lead Communities. These purveyors will undertake specific assignments to meet specific needs within Lead Communities.

G. LAUNCHING THE LEAD COMMUNITY -- YEAR ONE

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

1. Negotiate an agreement with the CIJE that includes:

a. Detail of mutual obligations;

b. Process issues -- working relations within the community and between the community, the CIJE and other organizations

c. Funding issues;

d. Other.

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

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

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

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

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

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

- a. Assessment of needs and of target groups (clients).
- b. Rates of participation.
- c. Preliminary assessment of the educators in the community (e.g., their educational backgrounds).

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

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

* * * * *



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City

State

Zip

Country

FROM: FAX NO. (214) 361-9962

Name GARY ZEVI

Company

Tele. No. (()) Ext.

Dear Seymour + Annette,

Here's a draft agenda for Fri. I've taken MLM's advice and incorporated relevant assignments and items from the minutes rather than including ~~at~~ review.

Should we be ready with some suggestions for the Aug. 25 Board agenda? Lyle's about the following:

1. Presentation by L.C. selection committee and decision on final choices.
2. Outline of L.C. content.
3. Presentation of Hamoran project.
4. Update on Best Practices.
5. Presentation by heads of the training institutions for Jewish education.
(SF's suggestion for G.A. Maybe a day later?)

I look forward to your thoughts.

Amir

6/23/92

CIJE STEERING COMMITTEE

June 26, 1992

7:30 AM

Agenda

Participants - In Cleveland: Mort Mandel, Chair, Shulamith Elster,
Stanley Horowitz, Ginny Levi, Art Naparstek, Henry Zucker
In New York: Art Rotman
In Jerusalem: Seymour Fox, Annette Hochssein

Assignment

I.. Lead Community Update

AR

A. The nine finalists are:

Atlanta	Columbus	Oakland
Baltimore	Marino West	Ottawa
Boston	Milwaukee	Palm Beach

B. Plans for visiting the communities

C. Related assignments:

1. Draft questions and briefing materials
for discussion before first site visit. ((AR))
2. Propose content and dates for fall seminar. ((SF, AH))
3. Propose key elements of papers on content and
personnel in Lead Communities. ((SF, AH))
4. Describe possible programs for implementation
in Lead Communities and cost range for each. ((SE))

II.. Foundation Development Plan

AJN

A. From minutes of June 12:

In summary, the approach will be as follows:

1. Develop a matrix of program areas and prospects..
2. Develop a prospectus for potential donors..
3. Identify priority donors..
4. Undertake a focused campaign to raise funds..

B. Related assignments

1. Follow up with Cummings Foundation. (SE)
2. Prepare proposal for David Hirschhorn for funding of monitoring & evaluation. (SF, AH)
3. Report on status of proposal for CRB Foundation involvement in Lead Communities. (AH)

III. Communications

SE

- A. Memo has gone to board and SPA3 advising of selection of finalists
- B. Press release has gone to Anglo Jewish press.
- C. Preliminary discussion of SE memo of June 22 proposing a six month plan.
- D. Camper Contacts
 1. VFL is to distribute assignments for review and update.
 2. AH is to prepare talk piece by 6/30.

IV. Status of Other Current Assignments

VFL

- A. Develop a work and management plan for the next 4 months. (SE & AH)
- B. Draft annual operating budget. (SE & AH)

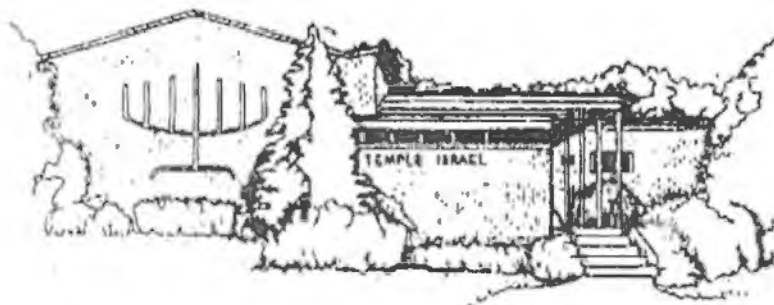
V. Meeting Plans

SE/VFL

- A. Fri., July 10 - CIJE Steering Committee
- B. Sun., July 12 - CIJE Advisory Group • in NY
Space reserved at D. Finn's office. They have speaker phones. "Nothing too sophisticated."
SF, AH, & VFL will be in Jerusalem. Goodman, Greenbaum, & Pollack definitely not available. Rather probably not. This steering committee + Finn, Holtz, Kraar, & Woosher are holding date. Should we cancel?
- C. Fri., July 24 ■ CIJE Steering Committee
- D. Tues., Aug. 18 - CIJE Steering Committee

- E. Mon., Aug. 24 - Preplan for Board meeting
Normally scheduled 1-55. In light of Lead
Communities selection committee meeting,
suggest we schedule 11 - 3; at JCCA.
- F. Mon., Aug. 24 - Lead Communities Selection
Committee - 3 - 5; at JCCA.
- G. Tues., Aug. 25 - 9:30 - 3:30 - CIJE Board; at
UJA/Federation
- H. Tues., Aug. 28 10:00:00 - CRITIQUE OF MEETING;
at UJA/Federation
- I. Mon. or Tues., Sept. 21 or 22 - Senior Policy
Advisors





C. C. Amette

TEMPLE ISRAEL of Natick

145 Hartford Street * Natick, Massachusetts 01760

508-650-3521

Ex 508-653-8640

DANIEL H. USCH
DRITOL H. USCH
RabbiHAROLD S. RUSHNER
Rabbi EmeritusROBERT S. SIKKAR
GroomerARNOLD ZOR-HESSLER
Education DirectorDR. DAVID GORDON
President

FAX TRANSMISSION

To: Seymour Fox

From: Arnold Zar-Kesglar

Date: June 22, 1992

Number of pages, including this one: one

Dear Seymour,

Hope Election Day finds you well and chipper.. As a member of the Forksommell subcommittee, I have been in touch with folks here from the continuity commission, who are very excited about Boston being having come so far in the CIJE election process.

As much as I've been working, I've been wishing to get clear answers on what CIJE would want from Boston the next time it is selected.. By that I mean, what sort of organization and ongoing reportage would be required of this community?

Is there someone from CIJE who would have clear information on this element of the project? I'd appreciate any information you could share on this topic.

Hope all is well with you, Bess, and your entire family.. Give my best to Za'ev, and everyone at the Amitym.

Best wishes,

Arnold
ARNOLD

Vera

Please suggest
Uu

A fo

Jack Sklar

Jim rVY

him out before

(y/x)

Seymour's name

June 21, 1992

LEAD COMMUNITIES: DESCRIPTION AND PROPOSED PLAN

HOW TO DEAL WITH THE CONTENT & THE VISION LOCALLY

1. Assume a "local CIJE" is set up, funded, staffed, convened. Assume there was an agreement between the North American CIJE and the local community, the seminar has taken place.
2. VISION: The community will be expected articulate over time its own vision of Jewish education in terms of:
 - where we want to be^A
 - versus
 - where we are today
 - (self-study,² Adams data, existing knowledge)
 - the community should be proactive as regards available opportunities (Jewish and general)
3. Work with separate groups on the vision:
 - Lay people³
 - Day school educators
 - Supplementary school educators
 - Informal educators
 - Etc.⁴

¹ The Mandel Institute take responsibility for the efforts dealing with the articulation or development of vision, goals, etc. In this case, the Mandel Institute will call a meeting, preferably at Harvard University, possibly in August or September, of a group of people at the national level, who will

be those actually working with the community on this topic. Danny will be the key person in preparing this project. The following people might be involved: Barry Holtz, Aryeh Davidson, Sara Lee, Sol Greenfield, Robert Hirt, Alvin Schiff, Danny Pekarsky, Lee Shulman, David Cohen, Israel Scheffler, Jack Bieler, Josh Elkin, etc.

There will be an annual work plan and program to this project. One of its key components at the Mandel Institute and will be the training of a group of people to take over and run it in North America.

2 The self-study will have in addition to the anticipated quantitative data a qualitative piece that deals with the content of education. We should identify a person (ask Alan if this is Sharon Feinman? Is it the Schon of the supplementary school? Someone else?)

The work on the qualitative element will be iterative and be a part of the monitoring, evaluation and feedback project in all probability (ask Alan Gamoran at our meeting on July 1st).

The self-study will include teachers and all educational personnel assessment.

Assignment: Prepare guidelines for the self-study, to be ready by early September.

3 We have to define the community option (assignment)

4 At the end of each section we will define what is involved and who will be assigned to do it.

1.

□ □ .

AGENDA -- ADAM GAMORAN, JULY 1st1.
1.

The self-study (design, who designs?, the qualitative, the content of education rated, teachers and personnel assessment, etc.)



June 21

LC SEMINAR AGENDA

1. Respond to content paper
2. Response to self-study definition



June 21

E.G. COLUMBUS OHIO

Jewish population: 16,650 (CJF says 15,000).

Federation dollars to education: \$706,000 (\$407,000)

Per capita expenditure of education: \$42 (\$30)

JCC expenditure per capita: \$237

Educational personnel: 398 per capita (\$23.90)

Lay leader: Mr. Yankin

See demographic-sociological study of Columbus (Merry! Weisman)

Talk to Merry!; try to obtain teachers' study, etc.



<u>Program</u>	<u>Best Practice</u>	<u>Goals/Vision</u>	<u>Imple- menting & Rein- venting</u>	<u>Agree- ment specifics</u>
----------------	----------------------	---------------------	---	--------------------------------------

1. Supplementary school

2. Day schools

3. JCC

4. Israel

5. Adult education

Possible additional opportunities:

6. Early childhood

7. College age

(1-7: integration across areas)

Scope: Inreach and outreach

Defined:
negotiate
5-7 char-
acteristics
for each
(who?)

Get BP
list now
-- ask
Barry

See our
old project
and SNC

See mini-
school &
others

Personnel
for these
things
(all)
PLUS
how do
you train
the per-
sonnel of
each
area?
Bring
them in?
What are
the bud-
getary
implica-
tions?
What is
the time
required
& the
time-
line?

VISION

REAL

What is the current, applied, view or vision or goals of education in various specific areas of endeavor in this community

OPTIMAL

What is the feasible/optimal vision?

IDEAL

The understanding is that this should be translating into achievable targets & goals for the community



BUILDING THE CAPACITY IN NORTH AMERICA

Resource Building (Nationally -- Continentally)

1. Establish a best practices center (JIS)
2. Uptrain & build the training institutions
3. Establish, or lead to the establishment of multiple Mandel institutions.
4. Recruit "Jewish brains" -- primarily academics from various university fields.



**THE COMMUNITY OPTION (OPTIMALLY WE MIGHT TRAIN CLAL TO TAKE OVER)
(SEE SEPARATE PAGE ON OUTCOMES)**

1. **A CHAMPION MUST BE TRAINED (MLM MAY LEAD THIS).**
2. **TRAIN A LEADERSHIP GROUP**
3. **BRING ABOUT A WALL-TO-WALL COALITION**
4. **ENGAGE THE RABBIS**
5. **A PUBLIC DEBATE SHOULD BE
ORGANIZED
ACTIVATED
ARTICULATED
FED
(E.G., A PUBLIC SEMINAR BY CHAMPIONS: CLAL^{>t} WOULD BE
RESPONSIBLE FOR THIS)**
- 6* **GOVERNANCE**



Personnel

THE STUDY OF BUILDING THE PROFESSION, ETC.

- 1. WE MAY ADDRESS PERSONNEL AT TWO SEPARATE LEVELS:**
 - A. THROUGH PROGRAMMATIC AREAS; AND**
 - B. NATIONALLY/CONTINENTALLY**

THEY SHOULD BE DONE IN PARALLEL. THE LOCAL EFFORT WILL INVOLVE:

 - A. A STUDY OF PERSONNEL CONDITIONS (AS PART OF THE SELF-STUDY)**
- ★ IN-SERVICE TRAINING PROGRAM DEVELOPED FOR ALL BY PROGRAMMATIC AREA**
 - ★ HIRE NEW STAFF**
 - ★ NEW STAFF AND NEW POSITIONS**
 - ★ SALARY STUDY**
 - ★ SET 10-YEAR GOALS**



EXHIBIT D

**Summary of Suitability Ratings, by Region
(Adjusted Average Scores)
Arranged from Highest to Lowest**

EAST	SOUTH	MIDWEST	WEST	CANADA
Boston (105)	Atlanta (91)	Columbus (80)	Oakland (68)	Ottawa (76)
Baltimore (92)	Palm Beach (89)	Milwaukee (75)	Dallas (60)	Montreal (70)
MetroWest (89)	S. Palm Beach (66)	Kansas City (69)	Denver (59)	Toronto (66)
Washington (88)			San Diego (55)	Vancouver (57)
Rochester (79)				Winnipeg (54)
Hartford (59)				
New York (58)				
Rhode Island (57)				
8	3	3	4	5

EXHIBIT E

Summary of Suitability Ratings by City Size
(Adjusted Average Scores)
Arranged from Highest to Lowest

LARGE (91,000 +)	MEDIUM (25,000 - 80,000)	SMALL (15,000 - 24,000)
Boston (105)	Atlanta (91)	Columbus (80)
Baltimore (92)	Palm Beach (89)	Ottawa (76)
MetroWest (89)	Rochester (79)	Kansas City (69)
Washington (88)	Milwaukee (75)	Vancouver (57)
Montreal (70)	Oakland (68)	Rhode Island (57)
Toronto (66)	South Palm Beach (66)	Winnipeg (54)
New York (58)	Dallas (60)	
	Denver (59)	
	Hartford (59)	
	San Diego (55)	
7	10	6

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

1750 Euclid Avenue
Cleveland, Ohio 44115
216/566-9200 Fax 216/861-1230

Honorary Chair
Max M. Usher

Chair
Morton L. Mandel

Chief Education Officer
and Acting Director
Shulamith Elster

Mailed to:

Atlanta
Baltimore
Boston
Columbus
MetroWest
Milwaukee
Oakland
Ottawa
Palm Beach

June 5, 1992

Dear

I am pleased to inform you that your community has been chosen to be a finalist in the Lead Communities Project of the Council for Initiatives in Jewish Education (CIJE).

The Lead Communities Committee of the CIJE Board of Directors, which made the decisions on the finalists, was very ably assisted in its review of proposals by 12 distinguished educators and community professionals who served on advisory panels.

Narrowing the field from 23 communities to 9 finalists was a challenge. The preliminary proposals represent over 40 percent of the eligible cities, and contain over 1.5 million Jews. That such a large portion of North American Jewish communities are now prepared to make a new level of commitment to Jewish education is a remarkable and encouraging statement.

More significant than quantity, the quality of the proposals from every single community was uniformly impressive. The programs that have already been launched, the caliber of lay and professional leadership that have been and are being assembled, and the plans that are in the works were outstanding.

In the next few days we will send you information about the finalist process. It will consist of a site visit, and a written elaboration on aspects of your preliminary proposal. We hope to visit your community in July and we will be in touch with you to make specific arrangements. If you have any questions in the interim, please contact Shulamith Elster, Acting Director of CIJE at (301) 230-2012.

Congratulations to you and your colleagues.

Morton L. Mandel

Morton L. Mandel
Chair

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

1750 Euclid Avenue
Cleveland, Ohio 44115
216/566-9700 fax 216/861-1780

June 5, 1992

Honorary Chair
Max M. Kadish

Chair
Morton L. Mandel

Chief Education Officer
and Acting Director
Dr. Shulamith Felder

Mailed to:

Dallas, Denver, Hartford, Kansas City, Montreal, New York/Suffolk County,
Providence, Rochester, San Diego, S. Palm Beach County, Toronto,
Vancouver, Rockville, Winnipeg

Dear

The Lead Communities Committee of the Council for Initiatives in Jewish Education (CIJE) Board of Directors has completed its deliberations on the preliminary proposals submitted by 23 communities from across the North American continent. Your community was not chosen to be a finalist in this selection process.

Narrowing the field from 23 communities to 9 finalists was a challenge. The preliminary proposals represent over 40 percent of the eligible cities, and contain over 1.5 million Jews. That such a large portion of North American Jewish communities are now prepared to make a new level of commitment to Jewish education is a remarkable and encouraging statement.

More significant than quantity, the quality of the proposals from every single community was uniformly impressive. The programs that have already been launched, the caliber of lay and professional leadership that have been and are being assembled, and the plans that are in the works were outstanding.

The Lead Communities Committee was very ably assisted in its review of proposals by 12 distinguished educators and community professionals who served on advisory panels.

The quality of the response to this CIJE invitation suggests to us that we are part of a ground shift in the priorities of the North American Jewish community. We at CIJE will be exploring other opportunities beyond Lead Communities to support and reinforce this movement.

On behalf of CIJE, I thank you for your interest in our project. We hope that you will continue the community-wide approach to the improvement of Jewish education described in your lead communities preliminary proposal, and we wish you well in that pursuit.

Morton L. Mandel

Morton L. Mandel
Chair



DATE: ~~3/14~~ TIME:

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1 TO: FAX NO. (011) 274 2. 61995V
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City State Zip Country

FROM: FAX NO. (416) 341-9942
Name GEORGE LEVI
Company _____
Tele. No. () _____ Ext. _____

The Lead Communities selection committee ^{U M A T} went away well. DEP members ~~except~~ David Hirschhorn participated. We had a shareholders meeting. Chuck will speak with him today or early next week.

You will undoubtedly get a full report from Art.
that SE & I thought you'd like to know the bottom
line. (By the way, C.R.B. was very engaged and
original for you that is all I can say at
this point, with the understanding that it will
be among the final selections.) Here's the
list:

Atlanta
 Baltimore
 Boston
 Columbus
 Detroit
 Milwaukee
 Oakland
 Ottawa
 Palm Beach

הנה נה

Henry

CIJE LEAD COMMUNITIES
Pre-Proposal Application

	Date	State	City	Jewish Population
1	3/25/92	BC	Vancouver	20,000
2	3/27/92	WI	Milwaukee	28,000
3	3/30/92	CA	San Diego	42,000
4	3/30/92	MAN	Winnipeg	14,800
5	3/30/92	MD	Baltimore	94,500
6	3/30/92	MO	Kansas City	19,100
7	3/30/92	NJ	Metro West	121,000
8	3/30/92	NY	Rochester	25,000
9	3/30/92	OH	Columbus	15,000
10	3/30/92	ONT	Toronto	135,000
11	3/31/92	CO	Denver	46,000
12	3/31/92	DC	Washington	165,000
13	3/31/92	FL	Palm Beach County	65,000
14	3/31/92	FL	South Palm Beach County	52,000
15	3/31/92	GA	Atlanta	67,000
16	3/31/92	MA	Boston	200,000
17	3/31/92	NY	New York/Suffolk	98,000
18	3/31/92	PQ	Montreal	95,000
19	3/31/92	RI	Rhode Island	17,500
20	3/31/92	TX	Dallas	36,900
21	4/2/92	CT	Hartford	26,000
22	4/2/92	ONT	Ottawa*	13,500
23	4/6/92	CA	Oakland	35,000

* Not eligible



AMERICAN JEWISH
ARCHIVES

ADDITIONAL BACKGROUND MATERIALS

21-May-92

ADJUSTED PANEL AVERAGES					
	Panel 1	Panel 2	Panel 3	Combined	Rank
BOSTON	116	0	94	105	1
BALTIMORE	0	94	90	92	2
ATLANTA	97	85	0	91	3
PALM BEACH	95	0	83	89	4
METRO WEST	103	0	75	89	4
WASHINGTON	83	93	0	88	6
COLUMBUS	79	82	0	80	7
ROCHESTER	0	83	75	79	8
OTTAWA	83	0	69	76	9
MILWAUKEE	0	82	68	75	10
MONTREAL	74	65	0	70	11
KANSAS CITY	53	86	0	69	12
OAKLAND	0	73	63	68	13
SOUTH PALM BEACH	0	56	76	66	14
TORONTO	61	0	71	66	14
DALLAS	0	50	70	60	16
DENVER	0	55	63	59	17
HARTFORD	54	64	0	59	17
NEW YORK / SUFF.	0	59	57	58	19
VANCOUVER	53	0	62	57	20
RHODE ISLAND	46	0	68	57	20
SAN DIEGO	34	76	0	55	22
WINNIPEG	51	0	58	54	23
Average	72	74	71	72	

Note: "0" means proposal was not reviewed by that panel.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Summary of Panelist Comments on the Lead Communities Applications



19-May-92

EXHIBIT A

FINAL SCORE - PANEL AVERAGES

	Panel 1	Panel 2	Panel 3
ATLANTA	80	85	0
BALTIMORE	0	92	90
BOSTON	96	0	94
COLUMBUS	65	82	0
DALLAS	0	50	70
DENVER	0	55	63
HARTFORD	45	64	0
KANSAS CITY	44	84	0
METRO WEST	85	0	75
MILWAUKEE	0	82	68
MONTREAL	62	68	0
NEW YORK / SUFF.	0	59	57
OAKLAND	0	73	63
OTTAWA	68	0	69
PALM BEACH	78	0	83
RHODE ISLAND	38	0	68
ROCHESTER	0	83	75
SAN DIEGO	28	76	0
SOUTH PALM BEACH	0	56	76
TORONTO	50	0	71
VANCOUVER	44	0	62
WASHINGTON	69	93	0
WINNIPEG	42	0	58
Average	60	73	71

Note: "0" indicates proposal not reviewed by panel.

EXHIBIT B

19-May-92

ADJUSTED PANEL AVERAGES

	Panel 1	Panel 2	Panel 3	Combined	Rank
BOSTON	116	0	94	105	1
BALTIMORE	0	92	90	91	2
ATLANTA	97	85	0	91	2
PALM BEACH	95	0	83	89	4
METRO WEST	103	0	75	89	4
WASHINGTON	83	93	0	88	6
COLUMBUS	79	82	0	80	7
ROCHESTER	0	83	75	79	8
OTTAWA	83	0	69	76	9
MILWAUKEE	0	82	68	75	10
MONTREAL	74	68	0	71	11
KANSAS CITY	53	84	0	68	12
OAKLAND	0	73	63	68	12
SOUTH PALM BEACH	0	56	76	66	14
TORONTO	61	0	71	66	14
DALLAS	0	50	70	60	14
DENVER	0	55	63	59	17
HARTFORD	54	64	0	59	17
NEW YORK / SUFF.	0	59	57	58	19
VANCOUVER	53	0	62	57	20
RHODE ISLAND	46	0	68	57	20
SAN DIEGO	34	76	0	55	22
WINNIPEG	51	0	58	54	23
Average	72	73	71	72	

Note: "0" means proposal was not reviewed by that panel.

A5

EXHIBIT CPreliminary Selection Groupings

Probable YES	MAYBE	Probable NO
Atlanta (91)	Columbus (80)	Denver (59)
Baltimore (91)	Dallas (60)	Hartford (59)
Boston (105)	Kansas City (68)	New York (58)
Palm Beach (89)	MetroWest (89)	Winnipeg (54)
Washington (88)	Milwaukee (75)	Vancouver (57)
	Montreal (71)	
	Oakland (68)	
	Ottawa (76)	
	Rhode Island (57)	
	Rochester (79)	
	San Diego (55)	
	South Palm Beach (66)	
	Toronto (66)	

Criteria

Probable YES	Both panels adjusted scores were 80 or over
Probable NO	Both panels adjusted scores were 65 or lower
MAYBE	All other communities

NOTE: Combined score in parenthesis

16

EXHIBIT D

Summary of Panelist Ratings, by Region
(Adjusted Average Scores)
Arranged from Highest to Lowest

EAST	SOUTH	MIDWEST	WEST	CANADA
Boston (105)	Atlanta (91)	Columbus (80)	Oakland (68)	Ottawa (76)
Baltimore (91)	Palm Beach (89)	Milwaukee (75)	Dallas (60)	Montreal (71)
MetroWest (89)	S. Palm Beach (66)	Kansas City (68)	Denver (59)	Toronto (66)
Washington (88)			San Diego (55)	Vancouver (57)
Rochester (79)				Winnipeg (54)
Hartford (59)				
New York (58)				
Rhode Island (57)				
8	3	3	4	5

1-7

EXHIBIT E

Summary of Panelist Ratings by City Size
 (Adjusted Average Scores)
 Arranged from Highest to Lowest

LARGE (91,000 +)	MEDIUM (25,000 - 80,000)	SMALL (45,000 - 24,000)
Boston (105)	Atlanta (91)	Columbus (80)
Baltimore (91)	Palm beach (89)	Ottawa (76)
MetroWest (89)	Rochester (79)	Kansas City (68)
Washington (88)	Milwaukee (75)	Vancouver (57)
Montreal (71)	Oakland (68)	Rhode Island (57)
Toronto (66)	South Palm Beach (66)	Winnipeg (54)
New York (58)	Dallas (60)	
	Denver (59)	
	Hartford (59)	
	San Diego (55)	
7	10	6

D
OKELIS
ASSOCIATES

COMMUNITY: ATLANTA JEWISH POPULATION:

SUMMARY STATEMENT: Atlanta's proposal highlights the dramatic growth undergone by the city's Jewish community over the last few decades. It points out that the funds available to the Federation have also increased significantly. Whereas other large cities community campaigns had an average growth rate of 2.9% between 1988 and 1990, Atlanta's rate was 13.7%. Federation Endowment Funds grew by 78.1% during that same period. The city aspires to be a regional center for Jewish activities.

Current Status of Education Programs: Atlanta currently supports a full roster of formal and informal activities, including day schools, supplementary schools and high schools and a range of formal and informal activities for youth and adults.

Leadership and Planning: The Council for Jewish Continuity (established 1992) follows up on the work of the Year 2000 Community Services Task Force which commissioned a formal study of Jewish education in 1990. In addition, Atlanta has more recently employed Jewish education experts Dr. Chaim Peri and Dr. Adrienne Bank as consultants in its planning process. Atlanta has formally articulated several goals, including establishing a new agency dedicated to the training and support of educators and educational institutions, a new endowment fund specifically for new education programs, and the creation of a Jewish Heritage Center housing a Holocaust Center, library, archives, and teacher resource center.

Chair: William Schatten, M.D. past President of Atlanta Jewish Federation

Staff: Professional staff to be hired

DRAFT

MAY 18, 1992

PROPOSED TIMETABLE

TASK	Lay Inv	END DATE	PRELIMINARY PROPOSALS
P		May 18/Mon COB	First draft of materials for Lead Community Committee are compiled (including results of panels) and faxed to Core Group .
F/S		May 18/Mon	1st draft of proposed site team members.
F		May 19/Tue	1st draft of finalist review process and site visit protocol to Core Group .
P/FS	L	May 20/Wed	Teleconference of Core Group on finalist recommendations, and planned agenda for forthcoming LC Committee meeting.
P	C	May 21/Thu	Proposed draft of package forwarded to CIJE Chair and LC Committee Chair for review.
	L	TBD	Staff meetings by phone with individual LC Committee Members .
[May 25 Memorial Day]			
F/S		May 26/Tue	Phone invitations/line up site visit teams.
F/S		May 26/Tue	2nd draft of finalist review process and site visit protocol to Core Group .
P	L	May 26-28/Tue-Thu	Input on package for LC Committee from CIJE Chair and LC Chair . Package forwarded to LC members .
F/S		May 28/Thu	Core Group teleconference to finalize site visit protocol.
P	L	Jun	Conference: LC Committee Chairman, Core Group regarding LC committee meeting.

P	L	Jun 1,2,3,4/ Mon,Tu,Wed or Thu	LC Committee meets to decide on finalists.
P/F		Jun 5/Fri	Finalists announced.
[June 7-8 Shavout]			
			FINAL SELECTION
F/S		Jun 9/Tue	Finalists receive instructions on final selection - due dates - proposed general agenda for visit - statistical profile, per our format First submission (3 weeks) Second submission (6 weeks)
F/S		Jun 11/Thu	Community specific questions to finalists, with site visit schedule
F/S		Jun 25/Thu	Telecon of first site visit team visitors, prior to visit. (Phased in thereafter.)
F/S		Jun 29/Mon	Site visits begin.
F/S		Jun 29/Mon	Preliminary materials due. [3 weeks] Includes: - summary of community needs analyses, prior studies - key personnel (lay & professional) - listing of key resources (e.g. personnel, dollars, universities) - detailed agenda for site visit - statistical summary, per our format
F/S		Jun 30/Tue	Materials sent to Site Team (if time; otherwise reviewed upon arrival at site).

		Jul 17/Fri	Site visits completed. (3 weeks)
	L	Late June/July	Planning meeting of LC Committee (e.g. site visits).
[July 4 USA Independence Day]			
	L	June - July	Staff visits with individual LC Committee Members .
F/S			Following site visit, team compiles list of follow up requests of community and preliminary summary report.
F		Jul 20/Mon	Finalist proposals due. [6 weeks] Includes: - improvement vision - plans for planning (1st year) - resources expected from community - resources required from CIJE
F/S		Jul 20/Mon	ALL materials received, including: - team site visit reports - final proposal materials - follow-up materials requested of communities by site visitors
F		Jul 22/Wed	Materials sent by overnight mail to Core Group .
F		Jul 27/Mon	Summary materials forwarded to Core Group .
F		Jul 28/Tue	Telecon of Core Group .
F		Jul 31/Fri	Staff review; ranking of recommendations; 1st draft of package materials to Core Group .
		Aug 7/Mon	Materials forwarded to CIJE and LC Committee Chairmen .
		Aug 10/Wed	Input of Chairmen received.

[Aug 9 Tisha B'av]			
F	L	Aug 13/Thu	Materials revised based on input; forwarded to LC Committee .
F	L	Aug 17 or 19/ Mon or Wed	LC Committee meets.
F	B	Aug 19/Wed	Materials forwarded to CIJE Board .
	C	Aug 24/Mon	Dress rehearsal.
	B	Aug 25/Tue	CIJE Board meets to make final decisions.
		Aug 27/Fri	Announcement of LC selection.
[Sep 7 Labor Day]			
[Sep 28-29 Rosh Hashanah]			

Task Code:		Lay Involve:	
P	Preliminary Selection Process	B	Board of Directors
FS	Final Selection Process/Site Visit	C	CIJE and/or LC Committee Chair
		L	Lead Community Committee Staffing/Decision making

Core Group = Shulamith, Annette, Seymour, Art, UAI


ASSUMPTIONS RECOMMENDATIONS

- Proposed site visits to 1 or 1 1/2 days/each (i.e. evening or day).
- Site teams of 3-4 people, including:
 - 1 CIJE staff/consultant
 - 1 professional (educator/planner)
 - 1 lay leader or 2nd professional
- Logistics and timing require a limit of finalist communities, preferably 8.
 - Assumes CIJE staff/consultants to include:
 - Shulamith
 - Art
 - Jack
 - Jim
 - Assumes over 3 week period that Shulamith and Jim can spend 1 1/2 week on road (3 visits); Jack 1 week (2-3 visits); Art less than 1 week (1-2 visits).
- Those communities visited earlier in schedule will have less time to prepare pre-visit submission, but more time to respond to inquiries of committee following the visit & vice versa.

DRAFT
MAY 11, 1992

SCENARIO FOR SITE VISIT

Preliminary Agenda:

- 
- I. Intro & Orientation 2 hours
 Presentation to Site Team by LC Leadership (Pro & Lay)
- Past accomplishments
 - Present capacity (programs & planning)
 - Vision & Plans
 - Needs & Concerns
 - Cast of Characters (leadership/personnel)
- II. Meeting with Local Educators (at a site) 2 hours
 Show & Tell -> Questions by Team (lunch)
- III. Driving Tour
- IV. Meeting with Professional Leadership late afternoon
 (JCC, Ed, Planners, Synagogue consortia, etc.)
- Past involvement/qualifications
 - Constraints needs
 - Priorities for CIJE (what community needs from CIJE to succeed)
- V. Dinner Meeting with Lay Leadership

F

PROPOSED SITE VISIT TEAMS

Lay: Urge to make one or more site visits:

Mandel
Ratner
Bronfman
Hausdorff
Hirschhorn
Merians
Lainer
Pollack

Each Lead Community Committee member to be urged to attend one site visit - not where they reside.

Question: whether to invite selected other CIJE board members.

Professionals

Abramson
Berger
Dubin
Ettenberg
Lee
Rubin
Woocher

Staff/consultants

Elster
Meier
Rotman
Ukeles



AGENDA FOR ACTION

GUIDELINE FOR COMMUNITY VISITS

To Be Used in Conjunction with "AGENDA FOR ACTION"

INTRODUCTION

Over the past several years, a **momentum** has developed in the JCC field ... It has been:

- A Momentum of **Direction** ...

... with the implementation of Jewish programming in JCCs, a direct result of the JWB Commission to Maximize the Jewish Educational Effectiveness of JCCs ...

... with the definition of and strengthened focus on the Jewish mission of the JCC; and ...

- A Momentum of **Leadership** ...

... with individual local Centers developing a feeling of "one-ness" with Centers in other communities ... and with the movement.

Much of this momentum has come about through the community consultation **visits** between leaders of the **JCC Association** [formerly JWB] and **local community** leadership, especially during the **Maximizing** process ... during the work of the Task Force on **Governance** and **Funding** ... and as part of the **Century 2** process.

These visits are planned to build on our success and momentum, and to move Centers and the movement into the **future**.

Goals of the Meetings

- The JCC Association has discovered that visits by Association **lay leaders and professionals** into local communities have been mutually **beneficial**, providing **visibility** and enhanced **communication** between local and continental leaders, in addition to accomplishing the specific purpose of the visit.
- This specific series of visits is designed:
 - to help local Centers and communities **plan** for the **future** ... to provide appropriate planning **tools** — specifically, the “**Agenda for Action**” ... to help **interpret** the JCC movement to local leadership.
 - to familiarize JCC Association leadership with **local concerns** that will help to shape the priorities for the Center **movement**, and to **interpret** to local leadership current **priorities** of the JCC Association.

Objectives of the Meetings

- To convene a series of meetings with target **leadership** groups
- To utilize “Agenda for Action” as a trigger for **engagement, discussions, deliberations** re: **planning** priorities, including implications for local Centers, for JCC Association.

Elements of the Plan

There will be **four meetings** in the community visit:

4:00 PM With JCC President, Executive and JCC Association Board members

5:00 PM With Federation President, Executive

6:00 PM With JCC leadership — specifically, the executive committee

8:00 PM *[OPTIONAL]* Additional target groups, for example: New Leadership, Advanced Leadership, Teens who participated in recent Youth Conference, Biennial participants, full Board.

NOTE: In these Guidelines, the JCC Association Lay Leader, who is chairing each segment of the visits, is referred to as "Visitor" or "The Visitor."

[Each separate visit begins on a new page; material is repeated when appropriate to more than one meeting group]

JCC President. Executive Meeting

The probability is that the local president has changed since former visits, and that you weren't the JCC Association leader present in this community.

Therefore, your goal for this meeting → to gain a **perspective on the local community**:

Briefly discuss local/continental planning process ...

... coordinated, purposeful planning for Centers, for movement, a result of forward-looking Century 2 activities.

Goals of the Meetings

- The JCC Association has discovered that visits by Association **lay leaders and professionals** into local communities have been mutually **beneficial**, providing **visibility** and enhanced **communication** between local and continental leaders, in addition to accomplishing the specific purpose of the visit.

The ongoing relationship between the continental organization and the local communities has been enhanced through effective community visits by the COMJEE initiative, by the work of the Governance and Funding Task Force, and through Century 2.

Explain **goals and objectives** of meeting series, as repeated below.

- This specific series of visits is designed:
 - to help local Centers and communities **plan** for the **future** ... to provide appropriate planning **tools** — specifically, the “**Agenda for Action**” ... to help **interpret** the JCC movement to local leadership.

-to familiarize JCC Association leadership with **local concerns** that will help to shape the priorities for the Center **movement**, and to **interpret** to local leadership current **priorities** of the JCC **Association**.

Objectives of the Meetings

- To convene a series of meetings with target **leadership** groups
- To utilize "Agenda for Action" as a trigger for **engagement, discussions, deliberations** re: **planning** priorities, including implications for local Centers, for JCC Association.

Important for visitor and other movement leaders to be fully aware of **local** needs, priorities, problems, successes.

Questions for visitor to ask:

How is the **Center** doing generally ... are there **community issues** to which you should be sensitive as you proceed with your meetings ... who are the **special personalities** ... the opinion-molders ... the people who will require special attention...?

Are there **special issues** you should be aware of as you interpret your goals and mission to Federation, Center, other community leadership, and as you work within the **community structure** in the **planning** process?

Investigate local **planning** process. Are there **substantive** and **concrete planning** activities currently being implemented or considered by the JCC or by the Federation? Some examples of these activities are population studies, needs assessment studies, studies re: serving special populations, such as handicapped, aged, Russians, users of day care.

Briefly refer to “**Agenda for Action.**” Review major categories ... Program and Service ... Leadership Development ... Professional Personnel ... Funding. Explain that these priority areas were determined through extensive leadership **consultation.**

“Agenda” will be used in more detail at later meetings.

Explain that in **next meeting with Federation President and Executive,** you will introduce “**Agenda for Action**” to them ... ask for their **perspective re: priorities** that will impact on the community in the next five years.

Conclusion

Emphasize to president and exec, as visitor prepares to close, the great **importance, in planning for leadership development,** of attracting **people of influence,** people in the community with **demonstrated leadership ability,** onto the **JCC Board.** This is vital for future vitality of local Center and full movement, and is **critical for local community growth.**

Discuss **Associates**. JCC Association staff member will let you know whether president and exec are Associates members. Urge them to take leadership in asking all their Board to become members. Emphasize that Associates funds are **credited to the Center's dues obligation**, taking pressure off Center and Federation budgets. **Every** Center Board member should enroll as an Associate, to express, as a Center leader, **identification** with the continental **movement**.

Remind president to plan to attend **JCC Association Board meetings** in New York on **September 20-22, 1991**, and **January 10-12, 1992** ... to include formal meetings of **presidents' groups**, and other special programming for **JCC presidents**. Their opportunity for direct input into governance of Center movement.

Encourage president to register early—and to recruit other JCC leaders—for the **JCC Association Biennial**, to be held **April 29 to May 3, 1992**, in **San Francisco**.



Federation President. Executive Meeting

Visitor is meeting with these **Federation leaders** because it is **important**, when **JCC Association** goes into a **community**, to **touch base with Federation leaders**, to gain their perspectives on the issues.

Explain **goals and objectives** of meeting series, as repeated below.

- This specific series of visits is designed:
 - to help local Centers and communities **plan** for the **future** ... to provide appropriate planning **tools** — specifically, the “**Agenda for Action**” ... to help **interpret** the JCC movement to local leadership, through use of the movement **video**.
 - to familiarize JCC Association leadership with **local concerns** that will help to shape the priorities for the Center **movement**, and to **interpret** to local leadership current **priorities** of the JCC **Association**.

Objectives of the Meetings

- To convene a series of meetings with target **leadership** groups
- To utilize “Agenda for Action” as a trigger for **engagement**, **discussions**, **deliberations** re: **planning** priorities, including implications for local Centers, for JCC Association.

Important for visitor and other movement leaders to be fully aware of **local** needs, priorities, problems, successes.

Explain that visitor is in community to follow up planning process that was initiated by Century 2 activities, and to **introduce “Agenda for Action.”**

"Agenda" is result of continuing process of **dialogue** between local **community** leadership and leadership of **JCC Association** [formerly JWB]. Priorities were developed in **consultation** with leaders of **JCCs** and **federations**.

Visitor will review "**Agenda**" priorities briefly now, in discussion of what was discovered throughout the continent.

Purpose of this meeting: to seek **federation leadership** reaction ... to **familiarize** federation leadership with **findings**... to gain **local** perspective for future **continent-wide planning**.

Give quick overview of "Agenda" headings ... priorities ... implications, as follows.

Program and Service

Visitor to skim down through main headings, allowing time for quick self-reading of priorities.

Headings:

Services That Strengthen The Jewish Family ... Outreach Services and Programs ... Jewish Education ... Adults ... Teens ... Life Fitness.

Leadership Development

Visitor to point out to those assembled the realization of the critical need for JCCs to attract people of **influence**, people in the community with demonstrated **leadership ability**, onto the **JCC Board**. This is vital for future **vitality** of local **Center** and full **movement**, and is **critical** to local **community growth**.

Professional Personnel

Visitor to point out to those assembled the critical need for strong and effective **recruitment** efforts, in order to attract the "**best** and the **brightest**" to JCC field, in **all staff** capacities.

Point out mandated real **involvement** of **lay people** in this process. Has become a lay priority.

Funding

Visitor to stress to those present the first heading: **support** for the **annual campaign**.

This accepted **priority**, calling for "increased efforts ... to support and actively work to enhance the annual campaign." is a **Center leader responsibility** as **partner in community with federation**.

Discuss other funding headings:

Self-Generated Income ... Planned Giving Initiatives ... Establishment of program "chairs" ... New sources of revenue.

Invite Federation leadership response to all above issues and priorities ... elicit their perception of their own community priorities.

Again investigate local **planning** process. Are there **substantive** and **concrete planning** activities currently being **implemented** or **considered** by the JCC or by the Federation? Some examples of these activities are populations studies, needs assessment studies, studies re: serving special populations, such as handicapped, aged, Russians, users of day care.

Stimulate discussion of role of **JCC** in **planning** process — what is role of JCC not only in **planning** for **itself**, but in the broader process of **community planning**?

Discuss.

Explain that visitor will be discussing these issues with **Center** leadership as you work to plan for future, and it will be helpful in planning for the movement to incorporate local **Federation perception of priorities** as well.

Thank Federation leaders for their input, and for taking the time to meet with you. JCC Association will provide continuing updates re: planning progress.



Executive Committee Meeting

This will be a dinner meeting.

Goals of the Meetings

- The JCC Association has discovered that visits by Association **lay leaders and professionals** into local communities have been mutually **beneficial**, providing **visibility** and enhanced **communication** between local and continental leaders, in addition to accomplishing the specific purpose of the visit.

The ongoing relationship between the continental organization and the local communities has been enhanced through effective community visits by the COMJEE initiative, by the work of the Governance and Funding Task Force, and through Century 2.

- This specific series of visits is designed:
 - to help local Centers and communities **plan** for the **future** ... to provide appropriate planning **tools** — specifically, the “**Agenda for Action**” ... to help **interpret** the JCC movement to local leadership, through use of the movement **video**.
 - to familiarize JCC Association leadership with **local concerns** that will help to shape the priorities for the Center **movement**, and to **interpret** to local leadership current **priorities** of the JCC **Association**.

Objectives of the Meetings

- To convene a series of meetings with target **leadership** groups
- To utilize "Agenda for Action" as a trigger for **engagement, discussions, deliberations** re: **planning** priorities, including implications for local Centers, for JCC Association.

Preliminaries:

Thank participants for coming to meeting.

[A copy of "**Agenda for Action**" has been mailed to each participant in advance of this meeting]

Elements of the Meeting

1. Show **video**, if it has not already been shown in the community. This is to introduce Center **movement**, illustrate **range and scope** of movement **mission, goals** and **activities**.

Discuss possible use of video for JCC.

... as a JCC **leadership education** tool ... **fundraising** [for federation allocations meetings; for individual solicitation] ... membership **recruitment**, at parlor meetings ... in **lobby** of Center ... to other Jewish and general **communal** groups ... for **recruitment** of new lay and professional **leaders** ... by JCC **leadership** on local TV talk shows, etc..

2. Walk through each section of "**Agenda for Action**," reviewing, within the major areas, the priorities and implications. Ask participants to follow along.

Program and Service

Visitor to skim down through main headings, allowing time for quick self-reading of priorities.

Headings:

- Services That Strengthen The Jewish Family
- Outreach Services and Programs
- Jewish Education
- Adults
- Teens
- Life Fitness

Discussion. These are the priorities as determined throughout the continent. Elicit JCC leadership reaction to them ... encourage reflection re: their local priorities.

Leadership Development

Visitor to point out to those assembled the realization of the **critical need** for **JCCs** to attract **people of influence**, people in the community with **demonstrated leadership ability**, onto the **JCC Board**. This is vital for future **vitality** of local **Center** and full **movement**, and is **critical** to local **community growth**.

Review of Leadership Development priorities and implications:

- Recruiting Lay Leaders
- Training Professionals To Work Effectively With Lay Leaders
- Developing Board Measurement Indicators
- Expanding Role of Advanced Leaders
- Enhancing Lay Leader Effectiveness
- Strengthening JCC/Federation Leaders Partnership

Discussion. These are the priorities as determined throughout the continent. Elicit JCC leadership reaction to them ... encourage reflection re: their local priorities.

Professional Personnel

Visitor to point out to those assembled the critical need for strong and effective **recruitment** efforts, in order to attract the "best and the brightest" to JCC field, in **all staff** capacities.

Allow time for those present to quickly read priorities in this heading:

- Creating Integrated Local/Continental Recruitment Effort
- Enhancing Professional Effectiveness
- Retaining Qualified Professionals
- Involving Senior Lay Leaders in Recruitment, Retention Efforts

Discussion. These are the priorities as determined throughout the continent. Elicit JCC leadership reaction to them ... encourage reflection re: their local priorities.

Funding

Visitor to stress that successful funding initiatives are imperative if we are to continue to serve the Jewish community effectively.

Discuss funding headings:

- Support For The Annual Campaign
- Self-Generated Income
- Planned Giving Initiatives
- Establishment of program "chairs"
- New sources of revenue.

Allow time for those present to quickly read priorities in these headings.

Discussion. These are the priorities as determined throughout the continent. Elicit JCC leadership reaction to them ... encourage reflection re: their local priorities.

Discuss **relevancy** of each section to local community.

Discuss each **priority** and its **implications**, and how it relates to the **local experience**.

Discuss other priorities and implications that are **unique** to the local experience for which **JCC Association** can offer help or become involved.

Elicit from assembled leaders ways in which **JCC Association** can help community to accomplish its **planning** goals within each area. Encourage open discussion of each issue.

Conclusion: Next Steps

Locally and across continent JCC Association will work with JCC leadership to identify the needs and solidify plans, using “Agenda for Action” as a working tool ... using the video to help interpret our mission and goals to our various publics.

Refer to new **strength** and **vitality** of movement ... how movement has become more than an **idea**, and has become a strong and living Jewish **reality**.

JCC Association **Board** and **committees** working in **consultation** with **community** leaders ... **presidents** are participating in meetings ... more and more **leaders** are **attending Biennial** and other important leadership functions ... strong suggestion that meeting participants intensify **involvement** in **movement** activities, in order to help local community and full movement.

Express hope that **all** assembled will want to **show their support** for the JCC Association and **express** their sense of **leadership** of and **identification** with a **continental JCC movement** by **joining the Associates program**. In doing so, they benefit both their own Center—because Associates funds are **credited to the Center’s dues obligation**—and the JCC Association and Center movement. Urge goal to have everyone on the Board sign up—100 percent!

Visitor hopes that this discussion will stimulate local planning initiatives. JCC Association wants to hear about these initiatives as they develop and progress.

Information that visitor has gained from assembled leaders will be helpful in Association planning for the movement.

JCC Association will share that information with other communities ...

... and will keep this community informed re: developments in other communities and throughout movement.

Thank all for active, stimulating participation. Suggest that **dialogue** be continued **locally**, with comments and questions directed to **JCC Association** on an ongoing basis.

Remain available for any questions and comments group may have after session.



Additional Target Group Meeting

[This meeting is optional. The character of the meeting will depend on the nature of the assembled group. Following, some suggested areas for consideration]

Biennial Participants

Focus on this group's **reaction** to the 1990 Biennial ... elicit thoughts re: their input into **planning** for upcoming Biennial ... explain that this is their opportunity to **improve** the **Biennial** experience ... ask for their views re: enhancing **networking** opportunities between Biennials ... if appropriate, raise any subjects that were discussed at the Executive Committee meeting, although many executive committee people may be present in this group.

Youth Conference Participants

Similar to above. Seek additional opportunities to **network**. Ask what this group has done since the conference, what kind of **follow-up** there has been ... what can be done to enhance their **activities** and **participation** in the community ... how can they work to get **other** people involved ... what are their suggestions for **JCC Association**?

Full Board of Directors

If there is a meeting of the full Board, we will want to request a half hour of agenda time. You might consider omitting the video from earlier meetings and deferring the showing until this meeting. If you show the video, engage the Board in a discussion of the **sweep** and **range** of the movement, and how the video might be used in the community.

If the video has already been used, center the discussion on “Agenda for Action.” A possibility: divide participants into four groups, in discussions of each of the four priority areas [Program and Service ... Leadership Development ... Professional Personnel ... Funding]. Members of the **Executive Committee** will be asked to serve as group leaders. JCC Association lay and professional representatives will listen to **feedback**, make appropriate concluding remarks re: the **movement’s future**.

New Leaders

The agenda for this group will be similar to that for the full Board, above.

7/91

