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MONITORING, EVALUATION, AND FEEDBACK IN LEAD COMMUNITIES: A THREE-YEAR OUTLINE

Adam Gamoran

University of Wisconsin, Madison

In late 1990, the Commission on Jewish Education in North America issued *A Time to Act*, a report calling for radical improvement in all aspects of Jewish education. At the center of the report's strategic plan was the establishment of "lead communities," demonstration sites that would show North American Jews what was possible:

Three to five model communities will be established to demonstrate what can happen when there is an infusion of outstanding personnel into the educational system, when the importance of Jewish education is recognized by the community and its leadership, and when the necessary funds are secured to meet additional costs (p. 67).

The successor to the Commission, the Council for Initiatives in Jewish Education (CIE), is mobilizing to establish lead communities and to carry out the strategic plan.

How will we know whether the lead communities have succeeded in creating better structures and processes for Jewish education? On what basis will the CIE encourage other cities to emulate the programs developed in lead communities? Like any innovation, the lead communities project requires a monitoring, evaluation, and feedback component to document its efforts and gauge its successes.

This proposal describes a plan for monitoring, evaluation, and feedback in lead communities. It emphasizes two aspects of educational change in lead communities:

- (1) What is the *process* of change in lead communities? This question calls for field research in the lead communities. It requires a combination of qualitative and quantitative data, and offers formative as well as summative evaluation—that is, feedback as well as monitoring for the lead communities.
- (2) What are the *outcomes* of change in lead communities? Does the project emphasize increased participation? Should we expect a rise in general Jewish literacy? Such questions are especially challenging because the specific outcomes have yet to be defined. By asking about goals in lead communities, the evaluation project will stimulate participants to think about their own visions and establish a standard by which changes can be measured in later years.

Field Research in Lead Communities

Studying the process of change in lead communities should be a major component of the CUE strategy. Documenting the process is especially important because the effects of innovation may not be manifested for several years. For example, suppose Community X manages to quadruple its number of full-time, professionally-trained Jewish educators. How long will it take for this change to affect cognitive and affective outcomes for students? Since the results cannot be detected immediately, it is important to obtain a qualitative sense of the extent to which the professional educators are being used effectively. Studying the process is also important in the case of unsuccessful innovation.

Suppose, despite the best-laid plans, Community X is unable to increase its professional teaching force. Learning from this experience would require knowledge of the points at which the innovation broke down.

Field researchers: A team of three full-time field researchers would be hired to carry out the field research in three lead communities. 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 across different individuals or segments of the community? How vague or specific are these visions? How are the visions being translated into specific goals for schools, community centers, trips to Israel, etc.? To what extent do these visions and goals crystallize as programs are being planned? >
- (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 CUE'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 their degree of satisfaction with salaries? Are school facilities 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 uncovering what these goals are. The second and third questions concern the "enabling options" described 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.

Field researchers will address these questions in the following way:

1. Supplement community self-studies with additional quantitative data, as determined following a review of the self-studies in all of the lead communities. For example, what are the educational backgrounds of Jewish teachers? How much turnover exists among educators in the community?
2. Use these data, along with interviews and observations in the field, to gain an understanding of the state of Jewish education in the community at the outset of the lead community process.
3. Attend meetings and interview participants in order to monitor the progress of efforts to improve the educational delivery system, broadly conceived.
4. Report on a regular basis to provide feedback for participants in the lead communities.
5. Write periodic reports describing and interpreting the process and products of change to date. An important contribution to the report would be to discuss the operative goals of programs in the lead community. The report would also assess progress toward the Commission's goals, and would speak frankly about barriers to implementing the plans of the local commission. In this way, the report would serve as formative evaluation for the community and the CUE.
6. Replicate the initial data collection a year later, and continue monitoring progress toward the commission plan.
7. Issue a report which would describe educational changes that occurred during the two years, and present an assessment of the extent to which goals are being addressed. The report would include the following:

- (a) Description of the goals that have been decided upon.

This will include cognitive goals such as desired achievements in subject matter areas (e.g., Jewish history, Bible, Hebrew). Where appropriate, it will describe and attempt to measure attitudinal and behavioural goals (e.g., measures of Jewish identity, involvement in synagogue life, attitudes to Israel and to Jews throughout the world).

Every effort will be made to discover goals for a community as a whole. They will range from quantitative goals (e.g., participation rates in post-bar/bat-mitzvah education, family involvement in family education programs), as well as elements that will be agreed upon by the community-at-large (e.g., involvement in the destiny of the State

of Israel and of Jews throughout the world, increased religious observances [according to specific denominational interpretations], changing the climate of the community concerning Jewish education, increased rates of involvement in community affairs).

- (b) Monitor initial steps taken toward reaching these goals.
- (c) Qualitative assessment of program implementation.
- (d) Tabulation of changes in rates of participation in Jewish education, which may be associated with new programs.
- (e) The resources of the Mandel Institute-Harvard University Program of Scholarly Collaboration and its project on alternative conceptions of the educated Jew will be made available by the CUE to those working on the goals aspect of the monitoring-evaluation-feedback project in the lead communities.

The faculty and staff of the religious denominations have been recruited to assist in this project. Prof. Daniel Pekarsky, a scholar in the field of philosophy of education at the University of Wisconsin, will coordinate this effort at developing and establishing goals.

Prof. Pekarsky and members of the staff of the CUE are collecting existing examples of schools and other educational institutions in Jewish and general education, that have undertaken thoughtful definitions of their goals.

It may be possible to compare changes in rates of participation to changes that do or do not occur in other North American Jewish communities. For example, suppose the lead communities show increases in rates of supplementary school attendance after Bar Mitzvah. Did these rates change in other communities during the same period? If not, one may have greater confidence in the impact of the efforts of the lead communities. (Even so, it is important to remember that the impact of the programs in lead communities cannot be disentangled from the overall impact of lead communities by this method. Thus, we must be cautious in our generalizations about the effects of the programs.)

The reports would serve as both formative and summative evaluation for the local commissions and the CUE. In other words, they would not only encourage improvement in ongoing programs, but would also inform decisions about whether programs should be maintained or discontinued.

Director of monitoring, evaluation, and feedback: The field researchers will be guided by a director of monitoring, evaluation, and feedback. The director will be responsible for providing leadership, establishing an overall vision for the project. Further responsibilities would include making final decisions in the selection of field researchers; participating in the training of field

researchers and in the development of a detailed monitoring and feedback system; overseeing the formal and informal reports from field researchers; and guiding plans for administration of surveys and tests in the lead communities. It will also involve coordination and integration of the work on goals that is being led by Prof. Pekarsky.

Collection of achievement and attitudinal data: Although specific goals for education in lead communities will now be developed, it is essential to make the best possible effort to collect rudimentary quantitative data to use as a baseline upon which to build. As an example, we might administer a Hebrew test to seventh graders in all educational institutions in the community. Seventh grade would be chosen because it is the grade that probably captures the widest participation of students who study Hebrew. The test would need to be highly inclusive, covering, for example, biblical, prayerbook, and conversational Hebrew. It may not be restricted to multiple-choice answers, in order to allow respondents to demonstrate capacity to use Hebrew as a language. The test would be accompanied by a limited survey questionnaire of perhaps twelve items, which would gauge students' attitudes and participation levels. Similar efforts will be undertaken to discover appropriate achievement tests wherever they may exist. First efforts will be undertaken to encourage teams of educators to develop additional achievement tests. This data collection effort would be led by a survey researcher, with assistance from the field researchers, from community members who would be hired to help administer the surveys and from specialists who would score the tests.

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**Council for Initiatives
in
Jewish Education**

Date sent: 2/17 Time sent: No. of Pages (incl. cover): 3
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Comments:

Salvatore,

Here is a draft award letter to go to
Rabbi Fruchman. Please review &
recommend any revisions you wish.
This seems like a lot of condition.
If you think any should be combined
or eliminated, let me know.

Shabbat Shalom.

Ginny

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Attached are the minutes of the Lead Communities Seminar which took place in Montreal on November 16-17, 1993. I have also attached, as exhibits, the various documents that were distributed during those meetings.

Please note two important dates which were agreed to in Montreal:

1. January 15 -- Date by which Lead Communities will notify CIJE of action to be taken before the action plan.
2. March 8-9 -- Date of next Lead Communities seminar, to take place in Atlanta.

If you have any questions, please feel free to call Ginny Levi at 216-391-8300.

Executive Director

Alan Hoffmann

MINUTES: CIJE LEAD COMMUNITIES SEMINAR - Montreal

DATE OF MEETING: November 16-17, 1993

DATE MINUTES ISSUED: December 3, 1993

PRESENT: Janice Alper, Lauren Azoulai, Chaim Botwinick, Ruth Cohen, Gail Dorph, Genine Fidler, Ellen Goldring, Roberta Goodman, Jane Gellman, Michal Hillman, Stephen Hoffman, Alan Hoffmann, Barry Holtz, Howard Neistern, David Sarnat, William Schattem, Louise Stein, Julie Tammivaara, Virginia Levi, ((Sec'y))

COPY TO: Seymour Fox, Darrell Friedman, Annette Hochstein, Adam Gamoran, Morton Mandel, Richard Meyer, Charles Ratner, Ilene Vogelstein, Shmuel Wygoda, Henry Zucker

I. Introductory Remarks

Alan Hoffmann, Executive Director of CIJE, opened the meeting, thanking the Jewish Education Council of Montreal for its hospitality. He introduced Shlomo Shimon, Director of the JEC of Montreal, who welcomed the group and spoke briefly about Jewish education in Montreal.

Alan then reminded the group that at previous meetings we had defined the concept of a partnership between CIJE and the Lead Communities, began to clarify what it means to be a Lead Community, and had taken the first steps toward developing a joint work plan. He noted that we are all learning as we move forward, and that it is important for us to continue to communicate regularly.

Alan noted that each community is now moving toward action with respect to personnel, with the work of the Monitoring, Evaluation & Feedback team as the spring board. The focus of this seminar was to discuss the process of clarifying and moving forward with a personnel action plan. It was anticipated that at the conclusion of the seminar each community would have a clear sense of direction, of the critical issues, and of how CIJE can help the community move forward with respect to personnel.

II. Community Updates

Each community was asked in advance to report on progress in the following areas:

1. Work of the local commission and committees
2. Public events or broader community activities
3. Status of the Educators Survey
4. Other issues of concern to the community

A. Atlanta

Bill Schatten reported the following:

1. With respect to mobilization of the community, Atlanta has established a wall-to-wall coalition which has begun to meet.
2. Atlanta sponsored a major public event on Jewish continuity together with the American Friends of Hebrew University which was attended by approximately 100 people.
3. On November 7, over 200 educators and rabbis attended a symposium on Jewish education. Gail Dorph led a session with principals on the Professional Lives of Jewish Educators. Other events include a discussion of medical ethics in the Talmud for 70 physicians and a series of lectures planned by the JCC for January and February.
4. The Educators Survey was to be completed during the week of the Montreal seminar with a return rate expected to be approximately 90%.
5. Atlanta has identified the following issues and challenges:
 - a. Having re-organized the Bureau of Jewish Education approximately two years ago, the differentiation of roles of this and related organizations is still being clarified.
 - b. The Atlanta JCC is working to enhance its Jewish content and plans to hire a full-time Jewish educator.
 - c. In an effort to enhance teacher training and development, Atlanta is working with Emory University to establish relationships.
 - d. Atlanta is searching for a full-time director of the Commission on Jewish Continuity and looks to CIJE for assistance.
 - e. Atlanta still needs to work out ways to ensure community commitment to Jewish education and increase funding support.
 - f. The Conservative movement recently held a meeting in Atlanta without first consulting with the Commission on Jewish Continuity or CIJE. As a result, the Atlanta Commission's issues were not on the agenda. There should be a way to get the denominational movements working more closely with the Lead Community process.

B. Baltimore

1. The first CIJE committee meeting was held in October. Its composition was broad based. Barry Holtz and Gail Dorph participated. It was apparent that the goals of the committee were not clear to all participants, so smaller meetings have been held since then to help clarify and to plan for the next meeting. A mission statement has been developed and issues with respect to the challenges for personnel and target populations have been identified for discussion at a meeting in December. [Exhibit A]
2. In June, Baltimore completed and published a strategic plan which, among other things, created the Center for the Advancement of Jewish Education as the coordinating body for Jewish education in Baltimore.
3. The Educators Survey had been completed and the data was about to be sent for analysis. The qualitative study of the Lives of Educators was completed and a report was anticipated by the end of January 1994.
4. The primary issue identified by Baltimore is the difficulty they see in identifying comprehensive, continental action which is specific enough for local application.

C. Milwaukee

1. A commission of more than 60 people has met twice since February. This is a broad based group representing lay and professional leaders across ideologies and from both formal and informal education. In addition, there is a steering committee to help manage the commission process and a task force on personnel issues which has met twice.
2. Milwaukee had just completed a strategic planning process with 33 community participants in addition to CIJE representatives. Using a consensus process, they identified and prioritized ten strategies for action, resulting in a list of the top three. [Exhibit B] These three, agreed to by all participants, are (1) building the profession, (2) adolescent education, and (3) funding. This will become the leadership agenda for the next five years.
3. The Educators Survey has been completed and the data analysis received by Milwaukee. Discussion is now under way with regard to distribution and use. It is anticipated that the data will be presented to interested agencies as the basis for discussion of critical issues. It is hoped that lay leaders will participate in the presentation and discussion of the data.

4. ~~Milwaukee~~ identified the following issues of concern:

- a. How to promote the Lead Community project and communicate with the community on concrete issues.
- b. How can the ~~Educated~~ Jew and goals projects contribute to the community's work?
- c. How can various community organizations be brought into the process?
- d. What progress has ~~been~~ made on national funding?
- e. How can CIJE help link the communities with the denominations?
- f. Can CIJE help in work with teens?

D. Discussion

The following issues were listed and it was agreed that they would be addressed before the conclusion of the seminar:

1. The relationship of national denominational institutions and the Lead Communities.
2. Promoting and communicating the Lead Community story locally and nationally.
3. Applications of the goals project and Educated Jew project.
4. How to use various local entities to get the buy-in of existing community structures.
5. ~~Progress on national funding issues.~~
6. How can the Best Practices work help in working with teens, family education and adult education?
7. ~~Progress report on Best Practice projects.~~
8. ~~Expectations of CIJE toward Lead Community programming and planning.~~

It was noted that it is clearly time to move toward action and show how this process can help bring about change in the communities. CIJE is convinced that this change will come through community mobilization and building the profession. It was felt that the

three community reports show that community mobilization is proceeding as commissions came together and begin to work toward agreement on a common agenda.

At this stage, the focus of our work should be on personnel as a key to effecting systemic change. The goal of this seminar was to help each community to move toward an action plan for personnel.

III. Projected First Year Outcomes in Personnel

A. "Critical Path"

Barry Holtz began by describing the critical path to developing an individual Lead Community personnel action plan. ([Exhibit C])

1. The first step is to complete the data analysis of the Educators Survey. ([Exhibit D])

The survey has been administered in all three communities. As the initial analysis is beginning to take place, communities should consider what critical questions they hope to answer with the data. These should be conveyed to Ellen Goldring. In addition to statistical analysis, an integrative report on policy implications of the results will be prepared for each community. It was noted that the policy implications report will serve as an executive summary of the data.

2. Reports discussed ([Exhibit E])

The discussion of the data analysis should serve to mobilize community support. While some of the information will be expected, there will be much that comes as a surprise to the community.

By discussing the reports on the Professional Lives of Educators, the Educators Survey, and the policy implications of the two, a community will be in a position to develop a personnel plan and to engage leadership in a discussion on personnel issues in the community.

While discussion and planning is under way, CIJE will work with each Lead Community to develop some preliminary actions which can be taken before an action plan is completed. This was to be discussed later in the seminar.

B.. Analytical Potential of Educators Survey

Ellen Goldring described the potential of the Educators Survey.. The purpose of the survey is to help each community determine how to move forward in the area of personnel.. It should help each community to establish a process for discussing personnel issues..

The first phase in analyzing the survey is to articulate the issues to be used in policy decision making.. The second stage is to collect and process information.. This is followed by interpreting results for planning and action..

The development of the survey followed a process known as "backward mapping." This describes the process by which community representatives got together to determine in broad strokes what they would like to know about personnel.. From this, the survey questions were developed.. In this way, the central issues were articulated..

The topics addressed by the educators survey are outlined on Exhibit F, attached.. With this general information as background, each community is invited to determine specific questions to which it seeks responses.. As the data is analyzed, these responses can be drawn from the survey.. Examples of some of the specific questions used by Milwaukee are included in Exhibit F..

In discussion, it was noted that a community can identify additional issues to be looked at in analysis both during and after the initial analysis is undertaken.. Following the initial analysis, if a community wishes to get the data discs from the company conducting the analysis, they are available and the communities are encouraged to continue to use the data..

Exercise

Participants were divided into three groups and invited to look at selected findings from the Milwaukee survey.. They were asked to answer questions regarding the issues these findings addressed, the meaning of the findings, and their policy implications.. This was done in cross community groups to demonstrate a process which might take place in the communities.. A copy of the selected findings and questions is attached as Exhibit G..

In the discussion that followed the exercise, it was suggested that presenting the data in a variety of settings will undoubtedly result in many different reactions.. It is the job of the leadership team to identify conclusions and begin to act on them..

It was suggested that this work be done in the context of a broader vision of goals for personnel in the community..

For the communities which have not yet received data,, it was suggested that it is not too early to begin to identify issues for more detailed analysis. Communities were invited to work with Ellen Goldring to brainstorm what they might like to know.. Ellen is also available to help refine questions in consultation with a community..

It was suggested that if a community can agree on a certain intervention based on the results of the survey,, it should undertake an educational process to involve leadership, both professional and lay, and encourage buy-in. CIE will work with a community to develop this educational process.

This exercise was undertaken to do the following:

1. Show how data can be used to generate discussion.
2. Point to mine fields, such as multiple interpretation, which can result from the use of data.
3. Show how to begin to bring "nuggets" of information to particular populations.

The issue of whether to share the data among the communities was raised. The Professional Lives of Educators report has been completed in Atlanta and Milwaukee and is in process in Baltimore. On the basis of the documents now in hand, it appears that these are likely to be reports which could be shared among the three communities. However, it was concluded that no joint decision will be made until the Baltimore report is complete. This matter will be discussed at the next meeting of this group.

On the basis of the first report on the Milwaukee survey, it appears that this, too, is data which could be shared among the communities. However, no decision will be made until each community has had a chance to review its report. It was suggested that Milwaukee might consider sharing certain data that would help Baltimore and Atlanta design questions for analysis. It was concluded that the Milwaukee Steering Committee will discuss this and be in touch with the others, through Ellen.

If and when the communities agree to share the results of both reports, Adam Gamoran and Ellen Goldring would be willing to prepare an inter-community report. This might be useful in disseminating some of our findings beyond the three communities.

IV. Engaging the Community in Discussing Educators Survey and Implications

A. Introductory Remarks

The second stage in moving from the Educators Survey to an action plan is to engage the community in discussion of the reports.. Roberta Goodman,, field researcher from Milwaukee,, was asked to describe her role in Milwaukee in presenting the data from the Professional Lives of Educators..

B. The Milwaukee Experience

The dissemination process in Milwaukee was intended to be an educational one. It began by posing the following questions to small groups::

1. How do people enter the field of Jewish education?
2. Are people satisfied with their work?
3. What do Jewish educators need to do their work?

After considering these questions and developing their own responses,, groups were provided an executive summary of the survey along with an introduction to how the survey was formulated and a summary of the qualitative study on the lives of educators. Participants were then asked what surprises they found in the data and what they found that confirmed their views.. This led to a discussion of the findings and their interpretations..

In discussion,, it was noted that both Atlanta and Baltimore have begun a similar process, even before they have the results of the surveys. It is anticipated that early engagement will help communities be ready to review the data when it arrives..

This interactive, educational experience can serve as the basis for study, conversation, and debate in each community.. It is anticipated that we will learn from the process and be able to apply it in other contexts as we move forward.

C. Community Mobilization Exercise

Each community was asked to spend time discussing how it might use the reports which will emerge from the Educators Survey process. These include the quantitative study--the Educators Survey;; the qualitative study--the Professional Lives of Educators;; and the policy implications report which will synthesize the two.
[Exhibit H]

It was noted that this process was intended as a simulation of what might happen in each of the communities.. The step of discussing the reports is a major one to be taken in adopting a personnel plan.

- D. Following is a list of the issues which communities raised as they discussed the use of the reports:
1. What gets disseminated and discussed,, and with whom?
 2. Whom do we want to buy in, and for what purpose?
 3. How do we reach large numbers of people--teachers, professional groups, lay leaders and others?
 4. How do we market the results?
 5. Who should be involved in answering these questions?
 6. What is the role of the local commission in this process?
 7. How does the senior educators survey fit into this picture?
 8. Who will facilitate the discussions? What is the role of CIJE staff in this process? Can a core of local people be trained to present the data?

In further discussion of the marketing issues, it was suggested that we might consider marketing the results continentally at the end of this process. Marketing at a local level would help to engage the necessary constituencies and get the conversation going. Getting the communities to address the issue of personnel in terms of the data will raise consciousness and, we hope, mobilize additional support.

V. Preparing a Lead Community Personnel Action Plan

A. Introduction

The meeting resumed Wednesday morning with a reminder that our goal is to move the personnel agenda toward an organized action plan. On Tuesday, the group looked at the process for completing the analysis of data and the discussion of the resulting reports. The next step is to determine how a planning committee might develop an action plan and what action can be taken in the interim.

An outline headed "Planning Committee Prepares Action Plan" was distributed and participants were asked to discuss it in small groups. ((Exhibit I))

B.. Discussion

The first step in the planning of an action plan is to map current and future situations. The following were identified as additional issues which will not be answered by the Educators Survey:

1. Perceptions of educational leaders..
2. Availability of resources to provide for needs..
3. Demographic trends that impact on the numbers of teachers..
4. Plans currently under way in individual schools to deal with these issues..
5. An inventory of what is now available to teachers in the community..
6. How to access untapped/unidentified human resources..
7. How to access leadership support..

It was suggested that one purpose of this mapping process is to mobilize community support. In addition to the information which can be gathered in this manner, a case can be made for engaging in efforts to upgrade personnel..

It was suggested that much of this is "old news." We are still working with the same people and the same system. In response it was suggested that the first step is to get the current players involved in the process. This should help if a decision is later made to turn the entire process "upside down."

The following conceptual model for CIJE was developed during discussion. Approaches to personnel might be viewed in three distinct streams..

1. Personnel Action Plan:

Taking existing personnel realities and using an action plan to prioritize and improve upon them.

2. Reconfiguring the conception of personnel: Stretching existing realities and building personnel to accomplish these

reconfigured goals. The Hebrew Union College work with five supplementary schools is an example.

3. The Educated Jew and goals projects: What are new models which can be designed to reconceptualize Jewish education?

A question was raised about how communities can establish relationships with funders now. It was suggested that this relates to the need to be able to gain access to local leaders. It was also suggested that CIJE work to engage foundations with the Lead Communities early in the process.

- C. Following the process of mapping, a community will begin to determine appropriate strategies to address the issues raised. Working together, they will lay out options and determine resources available. In this process, it was suggested that CIJE develop an inventory of projects and activities going on outside the Lead Community process which might be of use to the communities. An example is the Hebrew Union College project to reconfigure congregational schools.

In evaluating the action plan as it emerges, participants were reminded to apply the "screens" of content, scope, and quality as described on the second page of Exhibit I.

It was suggested that each community work toward developing a first "iteration" of an action plan for personnel by July 1994, for implementation which might begin as early as September 1994. One approach would be to take current institutions and stretch them as far as possible. Another is to "turn these institutions totally on their heads." Communities should ask themselves whether, based on our goals, we can achieve them as we are currently functioning.

Participants were reminded to keep the building blocks of community mobilization and building the profession in mind as planning proceeds. Where these intersect with work in the communities, CIJE is prepared to participate.

It was suggested that we consider inviting Isa Aron to a future Lead Communities seminar to share the work Hebrew Union College is doing with congregational schools. This might help to inspire communities to think about Jewish education from a different perspective. As the communities work to develop personnel action plans and begin looking for resources to help with implementation, CIJE will plan to go to the training institutions for their involvement.

VI.. Action Before the Action Plan

It was proposed that we consider new initiatives in personnel that could and should happen before an action plan is developed. What can we identify now to help move us toward our goals and give a sense of progress to the communities?

In order to bring about systemic change, it is important to have an impact on the following three groups:

1. Lay leaders
2. Educational leaders
3. Teachers/educators

It was suggested that any action before the plan is developed should target these groups.

Any pre-action plan should pass the screens of content, scope, and quality. It should have goals, be undertaken systematically, and address an issue of concern.

The following list of possible actions before the action plan was generated for the priority groups:

Lay Leaders

- Best Practice Presentations
- Goals for Jewish Education
- Best Practices in Supplementary Schools
- Congregational Lay Leadership

Education Leaders

- Senior Educator Program Recruitment (Target one from each LC for 1994)
- Education Leadership "Course" for Day School Principals (Cross denominational)
- Best Practice Course-- Supplementary Schools
- Best Practice Course-- Early Childhood

Teachers

- Judaica Upgrade of Early Childhood Educators

As an example under lay leaders, a seminar might be developed on goals for Jewish education for a group of lay leaders (possibly also education leaders) from all three communities. They might spend a week to ten days in serious discussion of the Educated Jew project and goals for Jewish education. This may need to be in Israel because of the unique resources available.

The list of possible early action includes programs that CIJE could develop in cooperation with the Lead Communities. This would provide an opportunity to move beyond the planning stage in a relatively short time. It would also provide a means to learn through action. It was suggested that these action items become an agenda for discussions of CIJE staff with the Lead Communities over the next several weeks. While some of the proposed projects require involvement of all three communities, others could be done by a single community.

It was noted that some of the proposed projects are currently under way in some form in one or more of the communities. There may be local experts who could help. For example, both Baltimore and Milwaukee are engaged in working with early childhood educators on Judaic content. Atlanta might wish to undertake this in consultation with the others.

It was suggested that a seminar on the goals project might be offered to up to seven people from each community. Bringing these people together to "translate" the Educated Jew concept into community and local institutional terms should help in development of an action plan.

After some negotiation, it was agreed that each community would decide by January 15 what action it wishes to initiate. This may be from the list presented above, or may be some variation which should then be discussed with CIJE staff for feasibility.

It was agreed that programs for day school directors might also be offered to supplementary school directors. It was also agreed that as CIJE staff visit the communities over the next 6-8 weeks, there will be further discussions about action before the action plan. Once there is a decision on the direction communities wish to take, CIJE will work with the communities to design the programs and determine the costs.

VII. Open Issues Discussed

Issues which were identified throughout the seminar were reviewed and briefly discussed.

A. What is happening with the national denominational institutions?

It was agreed that there should be presentations at future Lead Community seminars by the training institutions, describing their innovative work.

B. What are the expectations of CIJE toward Lead Community programming, projects, and planning?

CIJE expects a personnel action plan, work toward community mobilization, and development of action before the action plan. There

is the expectation that a research component will accompany these actions..

- C. How can various local entities be used to gain the buy-in of existing structures?

This question was left open.

- D. What progress is being made with respect to national funding?

CIJE has been in touch with the Avi Chai Foundation regarding its interest and support for work with day schools.. The Cummings Foundation has funded best practice work and is talking with us about support for paraprofessionals for supplementary schools.. Meetings have been held with the Lilly Foundation and there is good potential for funding when Lilly resumes its grantmaking activities..

- E. What help can the Best Practice project give in the areas of teen programming, family education, and adult education?

Work on best practices is in process with the JCC Association and on day schools. Conversations have also begun regarding best practices and the college-age student. Nothing has been done specifically in the area of youth and teens. It was suggested that before work could be done on family education, the concept would require further clarification.

- F. How can we promote and communicate the Lead Communities" story on a local and national level?

CIJE is working with a consultant who will submit a proposal for public relations work. At the very least, she would develop a CIJE brochure and write articles for the various Jewish newspapers. It was suggested that she might also help in communication with foundations and funding sources.

VIII. Concluding Remarks

It was suggested that the next Lead Communities seminar be held in Atlanta on March 8 and 9, 1994. We will explore the possibility of convening at noon on Tuesday and concluding in late afternoon on Wednesday with the possibility of some programming which would introduce the group to Atlanta's Jewish community.

The meeting concluded with Alan thanking everyone for their participation and noting that we are now on a track toward action.



ALVIN D. KATZ
CHAIRMAN
DR. CHAIM Y. BOTWINICK
EXECUTIVE DIRECTOR

COMMITTEE ON THE LEAD COMMUNITIES PROJECT

MISSION STATEMENT

The purpose of the Committee is to significantly impact and improve the quality of Jewish education through personnel. We recognize the integrity of all individual constituencies, as well as the need for community-wide initiatives.

All programs and initiatives proposed by the Committee will be comprehensive in nature, yet responsive to the unique needs of different constituencies. In addition, each program must include an ongoing monitoring, evaluation and feedback component.

**Strategies
November 15, 1993**

High school or college age students:

*** We will encourage and enable every Jewish person 13-25 years of age to participate in a(n educational) trip to Israel.**

Teens:

*** We will design and market a range of linked formal and informal Jewish educational programs that will engage the energies of teens, including but not limited to:**

- Innovative day and/or supplementary high school**
- Israel programs**
- Camping**
- Socializing**
- Family Retreats**
- Community Service**
- Other informal experiences.**

D'vrai Torah:

*** We will encourage the practice of presenting D'vrai Torah at all meetings and/or activities organized under community-wide Jewish auspices and observance of Kashrut and the recitation of Motzi and Birkat Hamazon.**

Professional Jewish Education:

*** We will further develop the profession of Jewish education by addressing issues such as:**

- Recruitment**
- Training**
- Ongoing Professional Development**
- Retention**
- Status**
- Career ladders**
- Standards**
- Benefits**
- Certification**

Lay Leaders:

*** We will raise the level of Jewish knowledge of lay leaders through their ongoing participation in Jewish study.**

Funding:

*** We will develop and implement an ongoing process to provide increased funding for Jewish education.**

Reaching out to college aged youth:

*** We will develop a strategy that maintains a substantive Jewish connection between Milwaukee and its College aged youth.**

Educational institutions evaluations:

*** We will encourage educational institutions to set and evaluating goals for themselves and we will provide resources to assist them in this process.**

Adults:

*** We will organize/coordinate and market a structured Adult Jewish Education program from existing programs and new opportunities, that will address individual needs as related to knowledge level, depth of learning and sequence of courses with assistance in course selection for individuals, and recognition for achievement.**

Families:

*** We will create opportunities for families to learn and experience Jewish life skills and will develop parallel and integrated programs for parents and children in appropriate settings.**

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Council for Initiatives in Jewish Education

Projected First Year Outcomes in Personnel

1

Critical Path to Developing Individual Lead Community Personnel Action Plan

OverView

I. Data Analysis Completed

II. Reports Discussed

III. "Action" before the Action Plan: Pilot Projects

IV. Planning Committee Prepares Action Plan

V. Action Plan for Personnel Discussed in Community

VI. Stages of Implementation

Council for Initiatives in Jewish Education

Projected First Year Outcomes in Personnel

i

Critical Path to Developing Individual Lead Community Personnel Plan

I. Data Analysis Completed

A. Professional Lives of Educators

B. Educator's Survey

***survey administered**

***what are the critical questions we want to have answered**

***who will convey them to Ellen**

***data analysis returned to communities**

C. Report on Policy Implications Received from Ellen and Adam

II. Reports Discussed

Goals of the discussions:

To shape the personnel plan of the community

To engage the leadership --lay and professional -- in a discussion about the issues of personnel in the community

t

A. Professional Lives of Educators

*what do we want to come out of the discussion?

*who should lead and organize the discussion?

*who should the participants be?

*when?

B. Educator's Survey

*what do we want to come out of the discussion?

*who should lead and organize the discussion?

*who should the participants be?

*when?

C. Policy Implications Report

*what do we want to come out of the discussion?

*who should lead and organize the discussion?

*who should the participants be?

*when?

The result of these discussions: policy implications for action plan

“?”

CIFE: MONITORING, EVALUATION, AND FEEDBACK PROJECTTopics Addressed by the Educator Survey**1. Profiles of Teachers:****A. General Background: Who are the teachers in our community?**

(Background section: Q 38-66)

For example: Gender, Jewish affiliation, ritual observance, income, etc.

B. Training: What is the educational background and training of the teachers in our community? To what extent are they formally trained in education and Judaica?

(Q 57-60)

For example: What degrees do they hold? In what subjects? How many hold teaching certificates?

C. Previous Work Experience: What work experiences do our teachers have?

(Q 6-11)

For example: How stable is our workforce? (Q 9, 10)
How experienced is our workforce? (Q 11)
What socializing experiences do teachers have? Do most teachers have experience as youth group leaders and camp counselors?
(Q 6)

**These sections can also be part of the discussion on careers..

D. Present Work Settings: What is the nature of our teachers' work?

(Q 20-28, 33-35)

For example: How many schools do they teach in?
Are they full time or part time? How many hours do they work? Would they like to be full time? Which benefits are available?
Advantages and disadvantages of working in more than one school?**2. Careers in Jewish Education****A. Recruitment: How are teachers recruited and attracted?**

(Q 1, 29, 32, 35, 37)

For example: Why did the teachers first become Jewish educators? How did they find their positions? What affected their decision to work at a particular School?

B. Retention: What are the teachers' future plans?

(Q 2, 61)

3. Professional Development:: What are the opportunities for teacher professional development?

((Q 12-19, 30))

For example:: To what extent do teachers participate in different types of professional development activities? What is their assessment of these activities? What skills and knowledge would they like to develop further? Who is providing help and support?

4. Sentiments About Work as a Jewish Educator:: How do the teachers feel about their work?

((Q 3, 4, 5))

For example:: What is their level of satisfaction? Do they feel respected by others in their community?

Examples of Specific Questions the Survey Can Address::

The following issues pertain to careers and will suggest implications regarding retention::

What is the relationship between a teacher's perception that s/he has a career in Jewish Education (Q 2) and::

- Q 36 working full or part time
- Q 56 importance of income from Jewish education
- Q 33 benefits
- Q 5 overall job satisfaction
- Q 26 work setting
- Q 8 having experience in general education
- Q 61 future career plans
- Q 22 hours of work

These analyses will address such questions as:: Do teachers who perceive they have a career in Jewish education typically work in day schools? Are there supplementary school teachers who perceive they have a career in Jewish education? Is a teacher's perception of having a career related to the hours he/she works, having experience in general education, or being offered certain benefits?

What is the relationship between future career plans (Q 61) and::

- Q 26 setting
- Q 36 working full or part time

What is the relationship between the importance of the income from Jewish education (Q56) and::

- Q 36 working full time or part time
- Q 26 setting
- Q 33 benefits
- Q 5 overall satisfaction

What is the relationship between receiving certain benefits ((Q 33)) and:

- Q 36 working full or part time
- Q 26 setting

What is the relationship between seniority at the present school ((Q 9)) and:

- Q 5 overall satisfaction
- Q 2 perceptions of having a career
- Q 36 working full or part time

The following belongs to the section on Careers-Recruitment:

What is the relationship between having experience in general education ((Q 8)) and:

- Q 36 working full or part time
- Q 5 job satisfaction
- Q 26 setting
- Q 56 importance of income from Jewish education

Q What is the relationship between educational training ((Q 58 or Q 60)) and:

- Q 2 perception of having a career
- Q 26 setting
- Q 36 working full time or part time

The following issues pertain to Settings:

What is the relationship between working in a particular setting ((Q 26)) and:

- Q 22 hours of work
- Q 36 full/part time educator
- Q 5 overall satisfaction scale

The following analyses pertain to the Professional Development section of the report:

What is the relationship between seniority ((Q 9)) and:

- Q 14 overall helpfulness of workshops
- Q 30 overall help and support received
- Q 16 areas desired for skill development
- Q 17 areas desired to increase knowledge

For instance: Are veteran teachers more likely than novice teachers to indicate that in-service opportunities were not helpful? Do the teachers' perceived needs of skill development and knowledge differ by teacher seniority?

What is the relationship between overall helpfulness of workshops (Q 14) and:

Q 26 setting

Q 58 or 60 educational training

For instance: Do day school,, supplementary school,, and pre-school teachers view the adequacy of inservice differently? Do teachers with higher levels of formal education view in-service differently than teachers with lower levels of formal education?

What is the relationship between level of help and support received (Q 30) and:

Q 26 setting

Q 58 or 60 educational training

What is the relationship between holding a license in Jewish or general education (Q 60) and:

Q 146 areas desired ffor skill development

Q 147 areas desired ffor increased knowledge

What is the relationship between setting (Q 26) and:

Q 146 areas desired ffor skill development

Q 147 areas desired ffor increased knowledge

Q 12 whether in-service is required

Developing a Personnel Plan for Your Community

AN EXAMPLE: Using Data about Professional Development of Jewish Educators

Background:

Half of the Jewish educators in Milwaukee (N=92) have at least one degree in education. One third of Milwaukee educators (33.3%, N=61) hold a graduate or professional degree. Over two-fifths (43.8%) have certificates in general education.

Selected Findings:

Milwaukee educators were asked, "How helpful were the workshops that you attended in the past two years in the following areas (Judaic subject matter, Hebrew language, Teaching methods, Classroom management, New curricula, Art/Drama/Music)?"..

The results indicated that educators with college and university degrees who majored in any type of education (e.g., curriculum and instruction, reading, special education) are less pleased with the helpfulness of workshops than is the group of Milwaukee educators as a whole. Those with degrees in education rate the workshops as less helpful than other educators.

Next, Milwaukee educators were asked, "In which of the following areas do you feel you would like to develop your skills further?" (They were instructed to check all the areas that interest them). Overall, more teachers are concerned with improving child motivation skills than any other area of skill development. The next most popular skill area is creating materials followed by classroom management, curriculum development, and parental involvement. These results are presented in the following table:

RANK OF SKILL DEVELOPMENT AREAS		
SKILL DEVELOPMENT AREAS		NUMBER
I. CHILD MOTIVATION SKILLS		127
II. CREATING MATERIALS		112
III. MANAGEMENT SKILLS		92
IV. CURRICULUM DEVELOPMENT		90
V. PARENTAL INVOLVEMENT		83
VI. CHILD DEVELOPMENT		69
VII. LESSON PLANNING		56
VIII. COMMUNICATION		55
IX. OTHER (INCLUDING ART)		10

Then,, we asked whether teachers in different settings indicate different needs for professional growth.. The results indicate that teachers in different settings often have different priorities.. For each skill development area in which teachers wish to grow,, the total number of teachers interested were reported by their teaching setting.. The results are reported in the next table::

% OF TEACHERS DESIRING SKILL DEVELOPMENT BY SETTING

<u>SKILL</u>	<u>SETTING</u> DAY SCHOOL	SUPPLEMENTARY SCHOOL	PRESCHOOL	OTHER
CHILD MOTIVATION	32.8%	36.9%	21.3%	9.0%
CREATING MATERIALS	31.5%	38.9%	25.0%	4.6%
MANAGEMENT	28.9%	40.0%	21.1%	10.0%
CURRICULUM DEVELOPMENT	32.2%	36.8%	23.0%	8.0%
PARENTAL INVOLVEMENT	21.3%	42.5%	27.5%	8.8%
CHILD DEVELOPMENT	35.8%	28.4%	28.4%	7.5%
LESSON PLANNING	25.5%	49.1%	18.2%	7.3%
COMMUNICATION	20.4%	33.3%	29.6%	16.7%
TOTAL POPULATION	32.4%	42.2%	20.5%	5.4%

This table suggests,, for example,, that supplementary school teachers are highly interested in lesson planning and parental involvement,, while communication is relatively more important to those in preschools..

Questions::

- 1) What issues do these findings address?
- 2) What do these findings mean? What do they say?
- 3) What policy implications do these findings have for personnel planning in your community?

G-2

Lead Community Seminar -- Exercise II (Tuesday Evening)

Community Mobilization Exercise for Discussing Data

For discussion by community teams::

As you discuss the three different kinds of data reports on personnel which you will have available, think about the following issues for each:

With whom will each of these reports be discussed?

WHO will facilitate these discussions? (How can we make sure the same for every group)?

When will discussion take place?

What will be the Results of the discussion?

What will happen to the results? How will they be fed into other discussions held by other groups?

By what mechanism will all these conversations be pulled together--deepened, enriched?

How will communal consensus be reached such that stakeholders feel that they have been part of the process and part of the whole?

V.-Planning Committee Prepares Action Plan

A. Mapping current and future situations:

1. Implications of data analysis reports— results of Step II above.
(recruitment, pre-and in-service needs, shortages, etc.)
₁
2. Predict future needs with input from local educators
 - * demographic trends
(does community have demographic data, e.g. need for early child ed.?)
 - * retirements
 - * impact of plans of individual institutions in community
(are there plans on the books for expansion of day school into high school, family educator positions in synagogues, new Israel programs)
3. Current and future financial picture
(campaign, community foundation, endowments, grants)

Results ≡ Issues in Personnel that our community needs to address

B. So what are we going to do?

1. What are appropriate strategies to address issues raised by mapping?

- *best practice currently available
- *new ideas to community's issues (e.g. programmatic, structural)

2. Lay out options and resources available

(resources include things like: local, national, international training institutions; denominations; local universities, etc.)

3. Apply "screens" of content, scope and quality to options

scope:

- *does initiative cover major settings and institutions in which all or most of education takes place?
- *will all or most people in the community be touched by the initiative?
- *is the initiative aimed at effecting profound and lasting change?

content:

- *is the initiative substantive, content-filled, thoughtful?
- *is it based in a projection of a vision of Jewish education with a striving toward specified goals?
- *is it reflective of the learnings from "Best Practice"?

quality:

- *can we say that the project is characterized by high standards that can be made explicit and cannot be met by the status quo?
- *does it live up to the goals which have been articulated?
- *does it have a monitoring, evaluation, feedback component built in?

4. Cost out options

5. Feasibility of options

- *resources (human and financial) available
- *demands of scheduling, etc.

6. Prioritize the options

Results: An Action Plan in Personnel for our Community

W. Action Plan for Personnel Discussed in Community

- A. Where will action plan be discussed?
- B. When?
- C. By whom?
- D. Projected outcomes (pilot projects)
- E. Who is responsible to carry the plan out?

VI. Stages of Implementation

- A. Plans
- B. Who provides service?
- C. Funding
- D. Timetable

MINUTES; CIJE LEAD COMMUNITIES SEMINAR - ATLANTA

DATE OF MEETING: March 8-9, 1994

DATE MINUTES ISSUED: March 21,, 1994

PRESENT: Janice Alper, Lauren Azoulaï, Chaim Botwinick,
Steve Chervin, Ruth Cohen, Gail Dorph, Jane Gellman,
Ellen Goldring, Roberta Goodman, Stephen Hoffman,
Alan Hoffmann, Barry Holtz, Virginia Levi, Daniel
Pekarsky, William Robinson, Ina Ragozin, David Sarnat,
William Schatten, Arnold Sidman, Louise Stein, Julie
Tammivaara

GUESTS:: Isa Aron, Shirley Brickman, Carol Ingall, Stuart Seltzer

COPY TO: Genine Fidler, Seymour Fox, Darrell Friedman, Annette
Hochstein, Morton L. Mandel, Rick Meyer, Ilene
Vogelstein, Henry L. Zucker

Prior to the first formal session of the meeting, the group heard an informative and entertaining introduction to Jewish Atlanta by Shirley Brickman, chair of "Creating Community," a project of Atlanta's Jewish Heritage Center.

I. Introductory Remarks

Alan Hoffmann opened the meeting, thanking the Atlanta Jewish Federation for its hospitality in hosting this meeting. He welcomed especially the following people, who were attending their first Lead Communities Seminar: Steve Charvin, Ina Regosin, Bill Robinson, and Arnie Sidman. He expressed the apologies of Genine Fidler and Ilene Vogelstein of Baltimore, neither of whom was able to attend.

II. Visions for Jewish Education: The Goals Project

Jane Gelman and Louise Stein of Milwaukee served as chairs of the session. Louise opened the session, noting that Milwaukee has approached the Lead Community project with a belief that the setting of goals is an intrinsic part of systemic change. They consider it the third building block, along with personnel and community mobilization. Louise noted that one of the best gifts we could provide a community is the empowerment to move forward with a focus. She then introduced Daniel Pekarsky to make a presentation on vision and goals.

Daniel noted that the goals project captures a vitally important dimension of the work of CIJE. In order for an educational institution to be effective, it needs a driving conception of what it is trying to accomplish. For a Jewish educational institution, its vision would be a conception of a meaningful Jewish existence which would animate that institution. A clear vision is indispensable to a thriving institution. The purpose of the goals project is to create a culture that appreciates vision and that will catalyze efforts to establish vision driven institutions.

When it is clear what an institution is trying to accomplish, it becomes relatively easy to determine the curriculum and the skills and attitudes necessary to implement that curriculum. A vision provides the foundation for decisionmaking within an institution. Educational goals should be anchored in an underlying vision. A vision provides the institution with a basis for determining reasonable goals.

In addition to helping with decisionmaking, a clear vision and accompanying set of goals provide a basis for effective assessment of a program. An institutional vision can help to energize the institution as people who participate have a sense of what they are about and a belief in its importance.

Daniel used the example of the role of "kitchens" in various kinds of educational institutions to illustrate the impact of vision. He noted that the underlying vision determines whether the kitchen is significant, to whom it is significant, the role of the teacher in its utilization, and whether a school has been successful in using the kitchen as its vision suggests that it should.

Turning to Jewish education, and especially the congregational school, it was noted that typically there is no clear vision. There are sometimes mission statements, but if they are even shared with the staff they are usually vague and offer little guidance. In practice the curriculum, teacher training, and selection of personnel show programmatic incoherence. Practice is more often guided by a desire to keep the students engaged and under control.

The following steps might be taken in order to help an educational institution become vision driven.

- A. Convince the institution that it needs to be vision driven.
- B. Work on an institution-wide basis to develop a guiding vision. The central players must believe in it. It must be compelling and energizing.
- C. Work together to translate the vision into educational terms.
- D. Find the right personnel to carry out the vision.

It was noted that this is not an easy task. It requires time and commitment. It is particularly difficult in a congregational setting to develop a clear vision, because the more definite it is, the more likely it is to leave some people out.

The goals project proposed by CIE is intended to foster appreciation for the importance of developing an animating vision among the leadership of communities and institutions and to catalyze efforts to do so. It will bring community leaders together to encourage the development of institutional visions and goals.

CIE is now in the process of developing a library of materials relating to vision and goals. It will include materials which focus on theory and strategies and will provide examples of vision driven institutions.

Page 3

The proposed summer seminar is intended to foster an appreciation of the concept of vision driven institutions among lay and professional leadership. In addition to deepening the appreciation of the role of vision among participants, it will provide them with opportunities to encounter examples, to look at obstacles and challenges to transforming vision to meaningful practice, and to plan together.

It is intended that the summer seminar will be followed by a series of local seminars to occur in each Lead Community during the 1994-95 academic year. These will be for representatives of individual educational institutions in each community. Conditions of participation will include an agreement to attend regularly and to send a core of people from a particular institution who can take the ideas back and work on their implementation. Based on participation in these seminars, CLJE may decide to propose the establishment of a consortium of vision driven institutions.

In the discussion that followed it was agreed that there are many steps that can be taken toward the upgrading of personnel while work on institutional visions is under way. Work should continue on a personnel action plan and on the first stages of its implementation while work on vision is undertaken in parallel. The two are complementary and both are necessary to bring about systemic change.

On further discussion about the concept of a consortium of vision driven institutions, it was noted that this is an idea in its very early stages. It will be thought through in more depth during the Jerusalem seminar and, if it remains a serious approach, will be developed for discussion in the communities during the coming year. At present, the goals project is intended more to enhance community mobilization than develop personnel. Clearly, the two will intersect in the future.

At the conclusion of this session it was agreed that many important issues had been raised. It was noted that this issue will continue to be discussed in the months ahead.

III. The Congregational Supplementary School: Reflection and Direction

Bill Schatten of Atlanta chaired this session. He began by introducing the three presenters: Carol Ingall, who is completing her Ph.D. at Boston University, was a researcher on the Best Practices in Supplementary Schools Project and former director of the Providence Bureau of Jewish Education; Stuart Seltzer, Principal of the Chizuk Amuno Religious School in Baltimore, a school identified in the Best Practices volume; and Isa Aron, Professor of Jewish Education at the Rhea Hirsch School of Hebrew Union College in Los Angeles.

- A. Carol Ingall described an effective school which she encountered in her work on the Best Practices Project. This was a Conservative congregational school which at one time had 700 students and now has 100. Students meet three times each week for two hours at a session.

The goals of this school are clear and pervasive. There is agreement that prayer is very important and that an educated Jew knows how to behave in a synagogue setting. There is a clear expectation that students will pray together and that their families

will join them in their learning.. The rabbis and cantor are involved in the school and are aware of the role of the school in the total life of the synagogue.. Older students serve as Torah tutors for the younger students and are honored for doing so by the total congregation.. The vision of the school is visible..

This is a serious educational institution where staff development is expected and a written curriculum is shared with the parents.. Parents have become involved in teaching electives at the middle school level.

The most important element in creating the culture of the school is the principal. The principal is a serious Jewish professional who came to the job having had secular education training.. The synagogue and the local bureau joined with the principal to help cover the cost of a master's degree at JTS..

This is an educational institution that has a clear vision, has the involvement of the clergy,, and does well what it has chosen to do..

- E. Stuart Seltzer, Principal of Chizuk Amuno Religious School, then spoke of his school, identified as exemplary by the Best Practices Project.

He began by discussing the concept of myth -- a story we tell ourselves about ourselves.. A myth tells who we are and what we can become.. He noted that the supplementary school has been held captive by a negative myth.. He believes that the role of the principal is to make a new myth -- to revitalize the religious school community.

This school works within a context characterized by the following:

1. ~~Commitment to content does not mean that learning must be~~ boring.
2. Synagogue education is family education.
3. The lives of the educators and students are bound together.
4. The teachers are professionals for whom teaching is their life's work.
5. ~~The students' lives are changed by the experience.~~

He noted that the principal's role is to live the myth, or "vision," of the institution in order to inspire.. He must provide optimism, passion, and support.. If the myth maker is successful, everyone in the school should be able to tell the story.. As personnel are identified and hired, they must be people who are committed to the school and its vision.

Staff development focuses on the importance of a staff growing and changing together.. The staff is a community of learners who study and learn together.. The teachers work together in teams and share their special skills.

This congregational school is unique in that it shares space with a day school. Many of the teachers also teach in the day school and there is a close working relationship between the two.

The school works to develop a sense of community. Its programs for families validate what is happening in the classroom.

- C. Isa Aron spoke of a project of the Rhea Hirsch School of Hebrew Union College, an experiment aimed at reconfiguring the congregational school.

During a year of planning, the Rhea Hirsch School learned that relatively few of its education graduates found themselves satisfied by work in congregational school education. Many felt that they had taken their schools as far as they could go, but that "good enough" was not satisfactory. Schools were running smoothly, but with little depth. People who were satisfied with their congregational school experience had very low expectations. Based on this sort of information, it was suggested that perhaps rather than simply preparing people for the field, HUC's mission should be to change the field.

They began to look at such questions as "What would it take to go from good enough to outstanding?" It was noted that the problems of religious school go beyond what is lacking in educators and materials. It is an issue of attitude among congregations. Studies should be woven into the fabric of congregational life, not simply relegated to a school. The model of Jewish education in supplementary schools today was developed in 1910 to reflect the kind of education undertaken in Christian religious schools. It is questionable whether the same model applies today.

It was suggested that the primary goal of religious education today is enculturation rather than instruction. It is to "create Jewish souls" more than to transmit information and develop skills.

With this in mind, HUC has invited five congregational schools to participate in an experiment. In each of the selected religious schools, the culture is communal and collegial. The educators are part of a team. Each of the five schools will rethink its educational goals and the structures for reaching those goals. HUC will provide advisers and prescribe process, but will not prescribe content. It is anticipated that each of the five schools will come out looking quite different from the others.

D. Discussion

In the discussion that followed, it was noted that the congregational rabbi plays a pivotal role in each of the models described. Any personnel action plan must consider the role of the rabbis. It was suggested that this conclusion should be shared at gatherings of rabbis sponsored by the denominational movements.

It was noted that transforming communities has to be done on the strength of inspiring individuals. This is an important concept to keep in mind as we train educators.

B. Baltimore

Since September there has been a series of meetings of the CIJE coalition and related focus groups. A priority has been to clarify CIJE's role in the community with a variety of community groups.

Baltimore is working in three areas:

1. What is the target population: which fields and which educators to work with.
2. What are the critical personnel challenges.
3. What are initiatives to respond to the challenges.

The preliminary results of the educators survey should be in Baltimore before the end of March. A subcommittee will review the data and draw some preliminary conclusions. Their goal is to look for "red flags." They plan to identify additional areas for cross tabulation with a goal toward completing analysis by the end of June and beginning work on a personnel action plan. Baltimore hopes to have a draft of an action plan by the end of August.

It was suggested that the summer may be a difficult time during which to mobilize educators to work on a plan.

Federation leaders have shown an interest in the work of the CIJE committee and efforts are under way to integrate the CIJE process in the Federation's strategic action plan.

In an effort to move ahead with action before the action plan, a project known as Machon l'Morim has been identified as a CIJE project. The project, funded by a private Baltimore foundation, involves twelve teachers from area schools (both day schools and congregational schools from across the movements) in an intensive training program on the teaching of Tefillah. Chaim Botwinick will circulate a summary of the project to seminar participants.

In addition, Baltimore has received a grant to support a fall conference which will most likely focus on best practices and monitoring, evaluation and feedback.

C. Atlanta

1. The Atlanta Federation has allocated \$50,000 to the Israel Experience Committee and will be sending two groups of youths to Israel this summer.
2. Atlanta is identifying new funds to support continuity and education.
3. Steve Chervin, who was present at the seminar, has recently been hired as director of the Council for Jewish Continuity.
4. Federation has approved a proposal to hire a Jewish educator for the JCC.

5. Decisions have been made regarding the governance of a supplementary high school.
6. It has been determined that the mission of the Atlanta Jewish library will be Jewish education.
7. Issues of concern include:
 - a. that Atlanta has not yet received data on the educators survey and,
 - b. that the community is not sufficiently aware of the CIJE project.

With respect to the issue regarding survey data, it was suggested that a conference call be scheduled with Ellen Goldring to clarify timing of the results. Once the data has been received, it is expected that a small committee will take an initial look at it and determine how to proceed.

V. Next Steps in Creating a Personnel Action Plan

This session, chaired by Gail Dorph and Barry Holtz, considered what an action plan might look like at the end of the planning process.

A. Case 1: Early Childhood

Based on data now in hand, we know that early childhood educators generally work full time and rely heavily on the income from this work. They receive few if any benefits and, as a group, have less Judaic knowledge than other Jewish educators.

Participants were asked to imagine that early childhood has been identified as a critical area for community attention. One step in an action plan might be to hold an early childhood institute for teachers and directors of early childhood units. Directors are included because we know that if they are not committed to a particular approach, it will have a low likelihood of success. This institute would offer opportunities for early childhood teachers to increase their Judaic knowledge and pedagogic skills at the same time. This should provide them with Judaic knowledge at the same time as it suggests a process for translating it into their educational settings.

The following chart was then presented:

A CASE FOR EARLY CHILDHOOD EDUCATION

Teachers	Judaic and pedagogy	Attitudes toward Judaism
Directors	Support teachers and families working toward Judaic content and atmosphere in the school	Attitudes toward Judaism and importance of early childhood as entry point to Jewish education

Supports: salary increments and comp time

The chart indicates that we are dealing with a system, both for teachers and directors. In order to support such an effort we might offer salary increments for attendance as well as compensatory time.

Discussion of the concept raised the issue of licensing and standards. In the past, communities have not responded favorably to the setting of standards. This is something that can be discussed again in the future, and probably should be part of CIJE's broader role in building the profession.

A question was raised regarding whether this model refers to day care or nursery school programs. It was suggested that in Jewish education, where the early childhood program is often the most time a child spends in a Jewish environment, we may not want to differentiate between the two.

It was noted that the discussion was focusing heavily on planning, a critical step in the process of moving toward action. However, the goal of this exercise is to assume the planning has been done and to begin to think about what action might be undertaken.

B. Case 2: Supplementary School Teachers

The data shows that supplementary school teachers are overwhelmingly part time, that approximately half of them have degrees in general education, and that very few have degrees or certification in Jewish studies. Because of the part-time nature of their work, salary is not as significant a factor as with early childhood educators. However, benefits, salary, and job security are all factors which would help to keep people in the field. There is some sense that if it were possible to offer full-time jobs, more people would be drawn to this field. This is a stable, committed teaching force.

The role of the supplementary school principal is critical in the training and general quality of the teachers,

Given this scenario, one approach to working with supplementary school personnel might be to offer Judaic content courses either through a local university or under the guidance of local rabbis. Another approach might be school-based staff development with Judaic and pedagogic content combined. Peer coaching might also be undertaken, either within an individual school or across institutions. In any case, the leader of the school must support any approach. Perhaps the principal could devote staff meetings to staff development rather than administrative matters.

In discussion it was noted that, in light of the centrality of the principal, early steps should be taken to work with supplementary school leadership. It was agreed and discussion turned briefly to the proposed Principals Institute now being planned for October.

It was noted that these were two examples of how a community might proceed once it decides what its highest priorities should be. As CIJE grapples with its role relative to that of the communities, it

is leaning toward serving as a broker to bring expertise to the communities. Each community will identify its own priorities, with resources coming from CIJE, which will clearly articulate its own biases and emphases.

It was suggested that a seminar in best practices in congregational schools be developed for the rabbis in each community as one way of linking several of the themes raised in the previous sessions. The role of the denominational movements in any such program should be explored.

VI. Concluding Remarks

In a brief discussion about the seminar just concluded, it was generally agreed that this format worked well.

It was suggested that, in light of the fact that each community is at a very different point in its work, fewer joint meetings will be held in the future. We will work toward holding two meetings each year with the next to be scheduled for early October in Milwaukee. The week of October 3 was proposed, with Monday and Tuesday of that week as primary targets. If that does not work, we will aim toward the week of October 24. While there will be opportunities to meet around sessions at the GA, there will not be a separate Lead Communities seminar in Denver.

The CIJE . Current state of affairs and implications for the MI.

Background.

- As of August 15th, the CIJE has added an American team: Alan Hoffmann, Gail Dorph, and Barry Holtz. It has generated a renewed sense of trust and expectations, both for lay leaders (CIJE Board, local LC,,) and in the LC..

Major events: Meeting in New York in August 1993 to set the agenda for the future as the new team started to work.

Seminar for the three Lead Communities in Baltimore, August 1993.

Board meeting in New York, August 1993.

Visit of Alan and Gail to the communities, September 1993.

Second set of visits by Gail and her impressions, October 1993.

Seminar in Jerusalem for the CIJE team, October 1993

Update and Issues :

A) The CIJE.

I) Relationship of the CIJE with the Mandel Institute.

- Accountability of the MI
- Flow of information (letters, reports on the educators surveys ,faxes, telecons, meetings,)
- Consulting role (Seymour, Annette)
- Administrative (Yehoshafat, Abby, access to information for CIJE case study)
- SW's role

II) From three to 23 Lead Communities

III) Relationship with CIJE top lay leadership . (MLM, Ratner, Ritz, Coleman)

B) The Lead Communities.

IV) Prospects for this year :

- Educators survey
- Personnel (seminars for principals)
- The Goals project
- Developing lay leadership
- Best Practices (operationalizing of supplementary schools, and early childhood as well as publication of day schools, camps)

V) Communicating the message:

The difficulty in getting the message accross:

- " What is a Lead Communities project "
- " Yes enabling options, but what with the day to day reality ? "

VI) Access to the educational world in the three LC's

C) Content

VII) Is the fact that seminars for educators will be organized in Israel, produce a sensible improvement in the quality of Jewish education in the LC.

VIII) Role of the Training Institutions

- Brief report on the TI.
- Given the reality , can we expect tangible results re Personnel and goals?

Council for Initiatives in Jewish Education

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Date sent: November 12, 1993 Time sent:

No. of Pages (incl. cover): 9

To: Seymour Fox, Annette Hochstein

From: Mary Esther Block

Organization: Shmuel Wyszogoda
Shou#1 V 6da

Phone Number

Phone Number: 216-331-1852

Fax Number

Fax Number: 216-331-5230

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Comments:

Team:

Please find attached copy of minutes from 11/14/93 staff meeting in Milwaukee.

MEB

MINUTES: **CJJE STAFF MEETING**
Milwaukee

DATE OF MEETING: November 14, 1993

DATE MINUTES ISSUED: November 18, 1993

PRESENT: Gail Dorph, Adam Gamoran, Ellen Goldring, Roberta Goodman, Alan D. Hoffmann, Barry Holtz, Virginia Levi, Daniel Pekansky, Julie Tamnivaara

COPY TO: Seymour Fox, Annette Hochstein, Stephen Hoffman, Morton Mandel, Henry Zucker

Alan Hoffmann introduced the meeting, noting that this would be the first in a regular series of meetings planned to be held in Milwaukee on a bi-monthly basis. The focus of the morning portion of this meeting was to be the Monitoring, Evaluation & Feedback project.

I. Introduction and Overview

Adam Gamoran opened the meeting with a review of the rationale for establishing the MEF project. He indicated that there were three basic reasons for the project.

A. Provide generalizable knowledge which could lead to replication.

The first reason for establishing the MEF project was to extend the vision for Jewish education. It is to have a chronicling function: to document what happens in the Lead Communities. It is also to have an analytical function: to find out whether what we undertake has an impact.

One domain of the MEF project is to evaluate specific projects. It looks for direct and indirect impact and for specific outcomes. For example, it might study whether the Hebrew ability of day school students at a particular grade level improves over a period of years. A second domain is to slice into any aspect of the Jewish community in order to study change over time. This reflects an approach towards systemic change which suggests that any element within Jewish education in a community might change over time as a result of the work of CJJE in that community.

The sorts of evaluation described above are the mandate of the MEF process. So far, in light of the fact that specific goals in the Lead Communities have not been clearly defined, this sort of evaluation has not occurred. The MEF team has begun to gather baseline data with respect to personnel, but has not yet begun to study change.

It was noted that so far the MEF team is focusing most heavily on recording what occurs. The interpretive evaluation has not taken place. The MEF team is waiting to be assigned to monitor and evaluate specific projects.

B. provide ongoing feedback

The second reason for the establishment of the MEF project was to provide both CIJE and the Lead Communities with feedback which could be used for corrective change. Adam noted that this is not a classic experiment because we are working to revise as we proceed. He noted that, in practice, it is problematic to have the field researchers involved in both providing feedback and encouraging change. The field researchers can point to problems, but should they also be teaching the communities how to correct them?

C. ^IEncourage the communities to become evaluation minded, themselves

We want the communities to treat evaluation as important. In the long run, we hope that the communities will accept MEF as something that they want and will fund.

It was noted that there is some degree of contradiction in the concept of the communities funding a process that responds to CIJE's agenda. MEF is responding to issues related to community mobilization and personnel.

Another challenge for MEF is to contribute more directly to CIJE's needs. The MEF team would like more guidance from CIJE on what to include in the feedback reports.

D. Discussion

It was noted that, in an ideal world, the communities would be more committed to the CIJE issues and the MEF process would respond more directly to both sets of needs.

It was noted that this is not a classic study of cause and effect for the following reasons:

1. There are no clearly articulated goals against which to evaluate.
2. Cause and effect is difficult to study when dealing with systemic change.
3. A classic study would require a much larger sample and comparison with communities in which we are not interceding.

It was noted that MEF is not evaluating CIJE -- not judging whether CIJE is a success or failure. It is only evaluating the role of CIJE in the Lead Community change process. Nor is MEF evaluating the effectiveness of Jewish education in a Lead Community.

In order to determine whether a community has improved through the Lead Community process, Adam envisions taking a "slice across the Lead Communities." In other words, MEF would identify some aspect of the Jewish education process, take a "slice" for evaluation now and do so again in three and five years.

II. Goals of MEF in 1992 - 1993

During the past year MEF has undertaken the following tasks:

A. Studying the process of change

- 1). Visions for Jewish education
2. The extent of mobilization
3. The status of personnel

B. In order to accomplish this MEF hired three field researchers to:

- 1). Design and pilot interviews.
- 2). Carry out interviews.
- 3). Monitor activities in each community by attending meetings and collecting documents.
- 4). Write analyses.
- 5). Provide feedback to the Lead Communities and CDE on a regular basis.

C. Played a major role in designing and analysing the Educators Survey.

While this was not originally part of the MEF mandate, it became a task of the project during the past year. Plans for '93-'94 will include further work on this project.

It was noted in discussion that the use of MEF products is unclear. A question was raised with respect to our role in dissemination. What, for example, is our role in presenting the professional lives of educators?

III. Workplan for 1993 - 1994

A. MEF will continue the process of monitoring and feedback. A memo of July 25 outlines the key issues.

B. Evaluation

II. Project-specific

While there are no clearly identified CIJE projects currently under way in the Lead Communities, there are specific related projects in Baltimore and Milwaukee which we have been asked to evaluate. An issue for discussion is which projects NEF staff should get involved in evaluating.

2. Community-wide

Adam and Ellen intend to identify an aspect of Jewish education to begin to study now and re-evaluate periodically in the future. They will develop a proposal for submission.

A question was raised about how we further the evaluation and research agenda in the Lead Communities or beyond. Is it part of CIJE's mission to develop a repertoire of evaluation instruments or to begin training others in evaluation?

3. Community profiles

The NEF team plans to work with the Lead Communities in developing profiles which include a look at their institutions, staff, participation rates, revenues, expenditures, etc.

IV. Methods of NEF

A. The narrative method - Julie Tammivaara

1. Naive skepticism

While the process of research is often designed to "make the strange familiar in exotic cultures," our goal is to "make the familiar strange." We have to consciously look at Jewish education, no matter how well we know it, through "naive eyes." The field researchers must approach their work with skepticism, recognizing that all stories they hear come from a particular person's point of view. Their strategies include getting information on a single topic from multiple sources and looking to see if and where they converge.

2. Characteristics

a. Ongoing involvement with the communities

Being in the communities permits the field researchers to understand what is happening in context. Over time, this should help us understand motives, commitments, and points of view.

A risk of being so closely tied to a community is the potential of "going native," i.e., going from being an observer to becoming a member of the community.

b. Reflective collaboration

By working together as a team, the field researchers have access to broader, more plausible interpretations. For this reason, they try to stay in close, regular contact.

3. "The Big Picture"

The field researchers view each community as a "center." It is the job of the field researcher to stay on the margin in order to identify elements of the community and how they fit into the structure. This process allows the field researchers to provide each community with its own story. It is expected that the increased self-knowledge will help a community set policy and raise issues that would not otherwise be discussed.

In discussion, a question was raised about how we decide where to be involved. It was suggested that perhaps the documentation lacks a set of anchor points which explain why field researchers are looking at one group or organization rather than another. In response it was suggested that it would be extremely helpful to the field researchers to receive feedback on their feedback memos.

B. Surveys as a policy tool - Ellen Goldring

It was noted that the development and administration of surveys was not in the original MEF design. Now that it has become a part of the process, it is important to determine how to incorporate this into the total MEF picture. Following are the steps in the process:

1. Backward mapping

The first step in developing a survey is to determine what a community needs to know in order to make decisions and what kinds of policies are being worked on. Knowing where a community hopes to go is important in designing how to get there.

2. Design instruments and collect data

This process should be interactive, involving MEF-identified experts and community members in a way that serves to mobilize the community around the process.

3. Interpret results for planning and implementation

In discussion, it was suggested that we consult with Professor Hank Levin of Stanford University on how to bring about change in education. He is involved in the "Accelerated School Project." He might be helpful in strategic planning and visioning as well as in learning about the process of change and the implementation of a central idea.

It was noted that the notion of only three Lead Communities is being re-evaluated and that there will be efforts to expand the circle in some way. Part of this might involve sharing specific products as we move forward. For example, we might bring together communities that are interested in the educators survey and train them in the administration and analysis of the survey.

V. The Feedback Loop - Roberta Goodman

The original feedback plan was for the field researchers to write quarterly reports and submit them with no related intervention. It became clear that this was not sufficient. The current approach is to provide regular feedback (approximately monthly) and to raise questions.

In Milwaukee, Roberta has tried several approaches. The first is to write memos which are shared with the core planning group in advance, then discussed with them. Another is to submit written reports with no direct discussion. A third is to provide exclusively oral feedback.

The following questions were raised:

- A. To whom should the feedback be given? Only the core group or to each group observed?
- B. What do we give feedback about? (There is a fine line between being constructive and looking like spies.)
- C. How should feedback to Lead Communities be framed in order to maintain a rapport so that we can remain in the process? (It was suggested that ground rules negotiated with the communities in advance would be useful.)
- D. Giving feedback can be difficult, but it is clearly objective. Providing evaluation would be more problematic.

The suggestion of having a discussion about ground rules with the communities was discussed. It was noted that before such a conversation can take place, we must agree among CIJE staff on what the field researchers should be sharing with whom. We must set the ground rules and communicate them to the appropriate people. Step one is to discuss with each community what we and they need to know. Step two is to negotiate what we will actually do.

It was noted that a mobilization and vision report will be prepared soon and might serve as a "curriculum" in the Lead Communities.

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A question was raised about whether CIJE wants feedback from the field researchers. It was suggested that this be negotiated with CIJE. There should be a list of specific issues on which we seek feedback. In addition, field researchers should provide "helpful nuggets" as they arise.

VI. Open Questions

The following is a list of questions raised during the day which remain open for further discussion:

- A. How do we (MEF) satisfy our kin of serving the communities, when our agendas are set by CIJE?
- B. What constitutes a Lead Community project, and what determines whether a given project should be monitored and evaluated by the MEF team?
- C. How do we determine the boundaries of responsibility between MEF and implementation, with particular respect to the use of knowledge produced by MEF?
- D. What are our policies and procedures for disseminating MEF products (1) within CIJE; (2) within the communities; (3) beyond CIJE and the communities?
- E. How can MEF contribute to specific issues with which CIJE is grappling in a timely manner?
- F. Why are we not evaluating Jewish education as it now exists?
- G. What is the conceptual linkage between what we monitor and what we need to know?
- H. To whom do we give feedback, about what, in the communities?
- I. Does CIJE want feedback about itself?

VII. Further Discussion

The remainder of the day focused on discussion of a variety of issues.

A. Third field researcher

The candidacy of William Robinson for the position of field researcher in Atlanta was discussed. It was agreed to recommend his appointment.

B. Montreal

Plans for the Lead Community Seminar in Montreal were reviewed.

C. Emerging re-conceptualization

There was brief discussion about the outcomes of staff meetings which took place in Cleveland on November 7 and 8. It was noted that we are looking at a new way to engage the CIJE board through the establishment and active involvement of committees. Through the

committees, we will work towards developing a total vision for CIJE with long range outcomes identified. Based on this total vision, a workplan will be developed.

B. Goals

Discussion focused on what might happen at a seminar in Israel on goals. The conclusion was to consider a ten day to two week program for members of local commissions as well as school principals and their lay leaders. Portions of the seminar would be addressed to the entire group while separate workshops would be developed for sub-groups. This might be one of the pilot projects which can be offered to Lead Communities as part of the action plan to be developed at the Montreal seminar.

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DATE :: Nov 17, 1993

TO :: Annette Hochstein
:: Mandel Institute

■ -

FROM :: Adam Gaioran
:: University of Wisconsin-Madison

FAX PHONE :: 60826521400

VOICE PHONE :: 60826342533 (office) or 60823337557 (home)

MESSAGE: I sent this and a test message by e-mail perhaps
: it did not go through, or else your response did
: not get back to me.

November 15, 1993

To: Annette and Mike
From: Adam and Ellen

Attached is a bare-bones list of what Ellen and I see as the most important findings of our studies of Milwaukee educators. We are looking forward to discussing the presentation of these findings, as well as your views on whether some of these points should be omitted and/or others added.

Based on discussion with Alan, we intend to craft the report for a general audience. Two points made by Alan were especially helpful: We should model the report after Barry Kosmin's "Highlights of the 1990 Jewish Population Survey," which stirred up a lot of interest in the news media, in Federation meeting rooms, etc.; and we should write the report so that Jerry Stein (a Milwaukee lay leader) will read it and become energized by it. For these purposes, we are thinking about an 8 or 12-page glossy report, with a few graphs and tables, and some quotes from educators.

We suggest one of the following times for a conference call (all times are Israel time):

Thursday, Nov. 19, 4:30pm

Monday, Nov. 22, 4:30pm

Tuesday, Nov. 23, 4:30pm

Will one of these work for you? Please let us know what phone numbers to use.

The following are the findings we intend to stress in the report:

I. Training

A. Pre-Service Training

Jewish teachers of Milwaukee are surprisingly well-grounded in general education. Half have at least one degree in education, and over 40% are licensed teachers. In addition, they are a highly educated group, with over 85% college graduates, and one third holding graduate or professional degrees.

In contrast, the teachers have little formal education at this level in Jewish content areas or Jewish education. Only 9% (17 teachers) have degrees in Jewish Studies, and only 22% (41 teachers) are certified as Jewish educators. (Differences by setting if relevant....) Thus the need for development in Jewish content knowledge is even greater than the need for pedagogical training. However, both are areas of need, as only 33% are trained both Jewishly and as educators.

Not only do the teachers have little Jewish education at the collegiate level, but their earlier Jewish training is

education as children, and 38% had minimal exposure, i.e. no more than one-day supplementary schooling. Thus, over half the Jewish teachers in Milwaukee are virtually unschooled in Judaism. Most striking of all is the fact that 20% of preschool teachers are not Jewish -- even though these teachers provide instruction in Jewish subjects. But low levels of Jewish education among teachers is not restricted to preschools -- it holds across all settings.

B. Professional Development

At some level, in-service training reaches a substantial majority of Milwaukee's Jewish teachers. Pre-school teachers almost universally engage in staff development, a consequence of state licensing and accreditation requirements, and over two-thirds of teachers in day and supplementary schools attended at least one workshop in the last two years. Although the coverage is broad, it is also shallow: only 4% of teachers attended monthly or bimonthly workshops, and only 22% attended as many as 6 workshops over a two year period. Thus, professional development opportunities tend to be limited in scope instead of ongoing and sustained.

The evidence further suggests that current training opportunities fail to meet the diverse needs of educators in different settings and with varying backgrounds. For example, teachers with college training in education find workshops less helpful than untrained teachers, and overall, are less likely to view development opportunities as adequate. At the same time, teachers with degrees in Jewish studies are also less satisfied than others....??? Day school teachers are critical of Hebrew language and Judaica workshops they attended, whereas supplementary and preschool teachers rate such workshops more highly. In contrast, day school teachers are more critical of workshops on teaching methods, while day school and preschool teachers are more favorable to workshops on pedagogy.

Moreover, teachers with different backgrounds and from different settings vary in the kinds of staff development they seek. For example, those who desire assistance in lesson planning tend to come from supplementary schools, whereas those who wish to learn about child development tend to come from day schools and preschools. Another example of diverse needs is that inexperienced teachers typically want help with lesson plans, classroom management, and communication skills, whereas those with the longest tenures desire more work in curriculum development.

Implications: Inadequacy of training especially in light of backgrounds.

II. Careers in Jewish Education

Overall, 55% of Milwaukee Jewish teachers work 10 or fewer hours per week. One third of day school teachers and 45% of

only 25% of all teachers work full-time in Jewish education ((i.e., 30 hours or more per week)), 55% say that Jewish education is their career. In fact, over half of those who work part time in Jewish education say they are making it a career, whereas more than a third of those working full time say it is not their career. Implication: Worth investing in the part-timers who think of Jewish education as their career..

Most part-time teachers do not wish to become full time. Of those who do, salary, benefits, and job security were most often cited as potential incentives for taking on full-time work. Implications.....

Fringe benefits are generally not available to Jewish teachers. Even among those who teach full time, only 30% receive health benefits, 26% disability, and 2% pension. Although almost half of preschool teachers work full-time, only 8% receive health benefits, whereas most full-time day school teachers are covered by health insurance.

Varied importance of income -- matters to some, not others.....

III. Recruitment

As important as it is to provide professional development for Milwaukee's current teaching force, we should also think about selecting teachers with better backgrounds in the first place.....

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

P.O. Box 94553, Cleveland, Ohio 44101
Phone: (216) 391-1852 • Fax: (216) 391-5480

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Gamoran, Ellen Goldring, Roberta Goodman, Annette
Hochstein, Steve Hoffman, Alan Hoffmann, Barry
Holtz, Mort Mandel, Chuck Ratner, Barry Reis,
Esther Leah Ritz, Julie Tammiwaaaaa, Shmuel
Wygoda, Henry Zucker ✓

FROM: Jimmy Levi

DATE: November 15, 1993 1993

RE: CIDE Update

Enclosed is a report prepared by Gail Dorph describing work in the Lead Communities during the past few weeks. As with earlier materials submitted to you, please keep the information in this report confidential.

Executive Director

Alan Hoffmann

The Kemp Mill Synagogue

708 Hemleigh Dd., Silver Spring, MD 20902

593-0996

January 20, 1994
Shevat 8, 5754

Dear friend of KMS:

The Kemp Mill Synagogue will be honoring Rabbi Jack and Joan Bieler at our fourth annual banquet to take place on February 27, 1994. We will be honoring them for two important and exciting reasons. First, we are using this opportunity to install Rabbi Bieler as KMS's first official synagogue Rabbi. Second, we are honoring Joan and Rabbi Bieler for the contributions that they have both provided in the four year history of the Kemp Mill Synagogue. Since you know the Bielers, you can appreciate why we easily made the choice to honor them at this time and in this way.

My purpose in writing is to provide you with the opportunity to share your feelings with other friends and relatives of the Bielers. You can do this by simply placing a personal thought in our banquet journal. This year is proving to be our most successful banquet, and we hope that the same will be true for the revenue generated to our synagogue from ads placed in the journal.

I have enclosed a advertisement form for you, which gives you several options on the size advertisement you might want to consider. Note that there is a place on the form to write-out your message. If additional room is necessary, please use the back of the form. Please send in your responses as soon as possible, no later than February 10th so that we have time to print the journal with your advertisement.

I am available to answer your questions and assist you in any way I can. I can be reached at 301-681-3700 during the day and at 301-681-7016 in the evenings. On behalf of the Kemp Mill Synagogue and Rabbi and Joan Bieler, I would like to thank you in advance for your support.



Phil Lehman
Chairman,
Kemp Mill Synagogue
Banquet Journal Committee

BACKGROUND MATERIAL

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CIJE ISRAEL STAFF SEMINAR
October 20th-25th, 1993

AGENDA

I. Lead Communities: 1993/4 Operations

A. Benchmarks:

- January 31st 1994
- April 30th 1994
- July 31st 1994

1. Personnel:

- a. Senior Personnel - Presently in Israel
For future training in Israel
For training in U.S.
- b. Diagnostic profile and its relationship to personnel program
- c. Populations and dates for personnel seminars

2. Strategic Planning:

- a. Agenda for local commissions
- b. From local commissions to local institutions
- c. Priorities within existing strategic plans

3. Goals:

- a. Who will manage time process in LC's?
- b. Training institutions and individual LC's

4. Pilot Projects:

- a. For educators
- b. For students
- c. For lay leadership

5. Community mobilization

- = Champions
- = Lay leaders
- = Grass roots
- "Wexner" project idea

B. GA seminar

C. Letter of agreement

II. CUE: general

A. Denominations

B. Training institutions

C. Rabbis

D. From 3-23 ("Boston")

E. Educational Community

- Professional Advisory Group
- Conference and meetings

F. Lilly/CIJE colloquium

- Dates
- Participants
- Subjects

Some remarks on the current state of the CUE.

As of August 15th, the CIJE has a leading american team: Alan Hoffmann, Gail Dorph, and Barry Holtz.

Major events: Meeting in New York in August 1993 to set the agenda for the future as the new team started to work.

Meeting in Baltimore.

Board meeting in New York

Visit of Alan and Gail to the communities

Second set of visits by Gail and her impressions

Issues:

I) Relationship of the CUE with the Mandel Institute.

- Accountability
- Flow of information (letters, reports ed survey, faxes, telecons, meetings,)
- Consulting role (Seymour, Annette, SW)
- Administrative (Yehoshafat, Aby, Access to all the information for writting the CIJE story)

II) From three to 23

III) Next year :

- Educators survey
- = Personnel for LC (seminars for principals, pros, lay- leaders)
- The true issue of personnel
- The Goals project
- Developing lay leadership
- = Best Practices

IV) Role of the Training Institutions

Given the reality, can we expect tangible results re Personnel and goals?

Summary of operative decisions taken during the meeting of SF, ADH and SW on CIJE.

Sunday, September 26th 1993.

- 1) Role of MLM at GA. (ADH to call SHH)
- 2) SW to update ADH on state of Goals project (ongoing, Ed Jew, Scan Committee, Case study)
- 3) Suzanna, prepare time for discussion of case study, (to be taped)
- 4) For SF agenda with AH: Get Fried
- 5) For ADH: Prepare memo for SF re who deals with which Lay leaders.
A similar memo will subsequently be sent by SF to ADH.
- 6) For MI agenda:
 - a- Mandel Gescheften and North America
 - b- MAF in North America and the Mandel Gescheften
 - c- Cooperation with others who are serious about Building the Profession
 - d- Twersky's claim re השתלמויות
- 7) Prepare session during October CIJE staff seminar on Denominations
 - a- They are present in the Communities
 - b- Given that presence it is our responsibility to build them (e.g. Ed Jew)
 - c- Claims they made re Financial burden if they emphasize the LC (Bob)

Agenda for meeting with MLM on October 17th 1993

1) Arrangement re monies raised by SF for CIJE to be deducted from total amount committed to be raised.

2) Re Lay leaders in the U.S.:

- Kekst: For CIJE first, if there is additional funding then for Israel

- Nash: First for Israel, then for the U.S.

- Bader: 50-50

- Jesselson : U.S.

- Hirshhorn: SF to draft a letter of commitment; then during a meeting with ADH and Gamoran they can take SF's place.

- Bronfman: Develop approach for ADH:

SF suggestion is for one Lead Community, see what can be achieved re the Israel experience on two levels:

- An approach that maximizes success through thorough preparation and follow up.

- Proper marketing.

- Lainer

- Bill Berman

3) Public Relations re Wexner

4) Re: Training Institutions: SF suggests that ADH doesn't get involved at present time.

C UJE

O P E R A T I O N S

M A N U A L

CIJE OPERATIONS MANUAL

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FOR INSERTION IN: CIJE OPERATIONS MANUAL
SUBJECT: SUBMISSION AND APPROVAL OF EXPENSES

no. 1.1
effective 7/2/93
supersedes NEW

page 1 of 2

I. PURPOSE

The purpose of this policy is to outline the general guidelines for submitting and obtaining approval for expenses..

II. PROCEDURE

- A. All expenses should be submitted to the Office Manager of the CIJE, P. O. Box 94553, Cleveland, Ohio 44101 for approval and payment..
- B. It is recommended that travel expense reports be submitted immediately after completion of a trip for prompt reimbursement.
- C. For now, all expenses should be submitted on the travel expense form ((CIJE 201)). It is important to complete both sides of the form, providing clear and complete information.
 - 1. For telephone expenses, please submit your telephone bill with the CIJE calls highlighted or clearly marked. Indicate the person called or a brief notation on the purpose of the call.
 - 2. For office supplies or other incidental expenses, attach a separate sheet and list expenses.
 - 3. Attach all receipts to the expense form with a clear indication of what they are.
- D. When paying for guests at a meal, please indicate on the back side of the form the person(s) you hosted and the purpose of your meeting. It is important that the documentation clearly set forth the business purpose of the expense. Where possible, when you have meals with other CIJE staff or consultants, please submit your expenses individually.

III. PREAPPROVAL FOR SELECTED EXPENSES

- A. Several selected expenditures require preapproval. These include:
 - 1. Attendance at conferences and seminars (see Policy 1.5)
 - 2. Printing of documents (see Policy 1.2)
 - 3. Ordering Publications (see Policy 4.1)
 - 4. Capital expenditures including installation of services or equipment (see Policy 4.2)

FOR INSERTION IN: CIJE OPERATIONS MANUAL
SUBJECT: SUBMISSION AND APPROVAL OF EXPENSES

no. 1.1
effective 7/2/93
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page 2 of 2

5. Meeting expenditures for groups of 5 or more (see Policy 1.3))

- B. The appropriate preapproval should be secured before making the expenditure.. After the expense is incurred,, please submit the travel expense form with the receipt(s)) and you will be reimbursed promptly..

IV. EXPENDITURES FOR SECRETARIAL SUPPORT

These expenditures should be handled separately.. See Policy 1.4 for details..

V. EXPENDITURES FOR PROFESSIONAL SERVICES

When it is necessary to hire professionals, they should be considered consultants.. Procedures for hiring consultants are outlined in Policy 3.2.#

I. PURPOSE

The purpose of this policy is to outline the approvals procedure for the printing or copying of forms, letterhead, etc..

II. PROCEDURE

When there is a form, letterhead or other item that requires printing, this procedure should be followed. After the design or the concept has been approved, then follow this procedure to have the document printed.

- A. Complete CIJE 103 ((4/93)). Exhibit A contains a blank form that should be machine copied and filled out.
- B. Be sure to complete all blanks.
- C. Printing requires obtaining three bids.
- D. The office manager should include his/her recommendation.
- E. The approval by the office manager ensures that the form has been completed, is clear, and is justified.
- F. Avoid copying materials copyrighted by others. #

PRINTING APPROVALS FORM

no. 1.2
EXHIBIT A
page 2 of 2

Publication Title _____

Description of Publication _____

Proposed Use _____

Request to Quote

Quantity Requested _____ Time Frame for Use _____

Comments _____

TO BE COMPLETED BY OFFICE MANAGER:

Bid Results

1. Co. _____ Amount _____ \$/copy _____

Comments _____

2. Co. _____ Amount _____ \$/copy _____

Comments _____

3. Co. _____ Amount _____ \$/copy _____

Comments _____

RECOMMENDATION OF OFFICE MANAGER _____

Submitted by _____ Date _____

Knowledge Center Approval _____ Date _____

Financial Approval _____ Date _____

Operations Approval _____ Date _____

Final Approval _____ Date _____

I. GENERAL POLICY

All meetings or functions which will be attended by 3 or more individuals and require expenditures exceeding \$500 for such items as travel, meals, rooms or equipment rental generally must receive approval at least 30 days prior to the event.

II. REVIEW AND APPROVAL PROCESS

- A. A Meeting/Workshop Budget Request form (See Exhibit A) should be prepared for each event by a designated meeting coordinator.
- B. The meeting coordinator should prepare the budget request form for all elements. Information relating to airfares should be obtained through IVI.
- C. The meeting coordinator should include a brief outline agenda for the meeting with the budget request.
- D. Sufficient lead time should be built into the meeting planning calendar to assure that approval can be obtained at least 30 days prior to the event.
- E. After approval, the meeting coordinator should send a copy of the Budget Request Form to others who may be involved in the planning process.

III. REIMBURSEMENT

- A. Invoices for meeting costs for CIJE staff and consultants (room rental, meals, etc.) should be submitted for reimbursement to the CIJE office manager for processing. A copy of the Meeting/Workshop Budget Request form (Exhibit A) and any supporting explanation or documentation should accompany all requests for reimbursement.
- B. Individual travelers should submit their own Travel Expense Statements for their personal travel expenses incurred in route to and from the event.

IV. PLANNING GUIDELINES

A. Travel

All travel arrangements should be made through our appointed travel agent. Group rates from the airlines may be available and these

will be researched by the travel agent.. Please provide sufficient lead time to do this..

B.. Equipment

Most off-site facilities are equipped to provide the following items on a no-charge basis:

1. Chalkboards
2. Flipcharts
3. Projection screens, tables and extension cords

NOTE: Projectors, tape recorders, etc., are not normally provided and plans should be made to obtain these items. If not readily available, the equipment and its projected cost is to be detailed on the budget request..

C.. Meals

1. Meals which are not provided as part of a group should be budgeted to conform to the meal allowance schedule for individuals established in the Travel Expense Policy..

2. Groups

- a. As a general rule, group meals served in a private room will cost more. When it is necessary to meet in a private room, the cost of the meal should generally not exceed the meal allowance schedule by very much. Since these are work sessions, fancy or elaborate dishes are inappropriate and emphasis should be placed on normal fare.
- b. Group meals are to be budgeted separately and should be listed on the back of the Meeting/Workshop Budget Request form (Exhibit A):#

MEETING/WORKSHOP BUDGET ELEMENTS

EXHIBIT A
 No. 1.8.3
 Effective: 7/2/93
 Page 4 of 4

ATTENDEE COST: ~~2,000.00~~ **2,000.00**

3 \$

DESCRIPTION

MEETING ROOM(S):

5 \$

GROUP MEALS: (CHECK APPROPRIATE BLOCKS) AND (INDICATE THE PER PERSON COST AS WELL AS THE TOTAL)

☐ BREAKFAST \$ (PER PERSON) ☒ LUNCH \$ (PER PERSON) ☐ DINNER \$ (PER PERSON)

\$

EQUIPMENT:

\$

GROUP REFRESHMENTS:

\$

OTHER (SPECIFY):

\$

TOTAL MEETING/WORKSHOP BUDGET

\$

Submitted By	Date	Financial Approval:	Date
Air Fares Estimated		Operations Approval:	
Knowledge Center Approval:		Final Approval:	

* Required for budgets allowing less than 30 days notice.

FOR INSERTION IN: CIJE OPERATIONS MANUAL

SUBJECT: TEMPORARY SECRETARIAL SUPPORT FOR
FOUNDATION PROJECTS

no. 11.44

effective 7/1/93
supersedes NEW

page 1 of 2

I. PURPOSE

The purpose of this policy is to outline the procedure to be used for engaging secretarial support services required for foundation projects.

II. PROCEDURE

- A. An employee or consultant for any CIJE project should determine with his/her supervisor the need for hiring secretarial support. Once this is determined, the employee or consultant should identify a service that provides competent service at a reasonable rate.
- B. Once a secretarial service is identified, the consultant or employee should complete CIJE 108 (6/93) and return it to P. O. Box 94553, Cleveland, Ohio 44101 for filing.
- C. As work is performed, the secretarial service should send the bill to the employee or consultant for verification and approval. The consultant or employee should mark the bill "OK" and initial and date it.
- D. The consultant or employee should then send it to P. O. Box 94553, Cleveland, Ohio 44101 for payment.
- E. Payment will be sent directly to the service provider. #

no. 1.4
effective 7/1/93

Page 2 of 2

MAF SECRETARIAL SUPPORT

Name: _____

Address: _____

Phone: _____

Social Security Number: _____
(if individual)

Secretarial Support for: _____

Project: _____

Rate: _____

Terms/Limitations (explain) _____

Submitted by _____ Date _____

Knowledge Center Approval _____ Date _____

Financial Approval _____ Date _____

Operations Approval _____ Date _____

Final Approval _____ Date _____

FOR INSERTION IN: CIJE OPERATIONS MANUAL
SUBJECT: ATTENDING CONFERENCES AND SEMINARS

no. 1.5
effective 7/1/93
supersedes NEW

page 1 of 2

I. PURPOSE

The purpose of this policy is to outline the procedure for preapproval to attend a meeting or seminar..

II. PROCEDURE

- A. Complete the Request to Attend a Meeting or Seminar (CUE 109) by making a machine copy of this form.. Contact the approved travel agent to determine travel costs..
- B. Obtain approval from your supervisor..
- C. Forward the completed form to CUE, P. O. Box 94553,, Cleveland, Ohio 44101 for processing.#

REQUEST TO ATTEND A CONFERENCE OR SEMINAR

no. 1.5
EXHIBIT A

page 2 of 2

Your Name: _____			
Name of Meeting: _____			
Please describe benefits of attending: _____			Cost: _____
			Prepayment Required? () Yes () No
Sponsoring Organization: _____			
Address: _____			
City: _____	State: _____	Zip: _____	
Dates of Scheduled Event: from: _____ to: _____			
Location of Event: _____			
Estimated Costs for Meeting/Seminar			
Registration Costs	\$	_____	
Travel Costs	\$	_____	() Air () Other
Hotel (if separate)	\$	_____	
Meals	\$	_____	
Total Estimated Costs	\$	_____	
Advance Registration costs to be paid with this request:		\$ _____	
Are reservations-cancellable?		() Yes () No	
Are costs recoverable?		() Yes () No	
Are there any restrictions?		() Yes () No	
		Explain: _____	
1 _____			
f			
APPROVALS			DATE
	Print Name	Signature	
Submitted By	_____	_____	_____
Approved By	_____	_____	_____
Approved By	_____	_____	_____
Approved By	_____	_____	_____
Financial Review		Final Approver	

I. PURPOSE

The purpose of this policy is to establish guidelines for telephone usage as a CIJE employee or consultant.

II. GUIDELINES

- A. All long distance telephone calls related to CIJE business should be documented with a receipt. Always list the person called.
- B. Telephone expenses should be included on a Travel Expense Report Form for reimbursement. The total amount of telephone expenditures should be listed on the front. A copy of the telephone bill (or other receipt) should be included. Information related to persons called can be noted directly on the bill.
- C. Where a personal telephone bill is submitted as documentation of CIJE calls, any CIJE calls should be noted on the bill. Always indicate person called.
- D. CIJE employees and consultants should use personal telephone calling cards for CIJE business. CIJE will reimburse for any documented calls made through our Travel Expense Report reimbursement process.
- E. When staying at a hotel, always use a personal telephone calling card rather than calling directly from the hotel. Hotels generally add a service charge, which in some cases is very substantial. #

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
TRAVELING IN U.S. AND CANADA

effective 5/26/93
supersedes NEW

page 1 of 11

I. OBJECTIVE

Managing our activities in an efficient and economical manner, without "frills," is a basic principle. All travelers are asked to be cost-conscious in their travel planning and to ensure that lodging, meal expense, car rental agencies, and airline carriers meet our standards. Our objective is to keep travel expenses cost effective, as well as to be practical and logical. Please know that all CIJE travelers will use this single set of standards and policies.

II. AUTHORIZED TRAVEL AGENT

The designated authorized travel resource should be used for travel and ticketing.

III. EXPENSE REIMBURSEMENT

A. Reimbursement of Expenses

The CIJE reimburses travelers for legitimate travel expenses incurred on authorized trips. In most cases, expenses are paid by the person incurring them, and then reimbursed when the Travel Expense Statement (CIJE 201) is approved by your designated approver.

B. Travel Expense Statement

1. Travel Expense Statements must be completed in ink (see Exhibits A-1). Receipts for expenditures should be attached to the back of the Travel Expense Statement.
2. Travel Expense Statements should be submitted for approval on a weekly or no later than monthly basis, depending on your travel schedule.
3. Fill travel reports out completely. Expense reports cannot be reimbursed when incomplete.
4. Unauthorized expenses will be deducted automatically. Both the traveler and approver will be notified of the amount and reason for the deduction.

C. Travel Expense Reimbursement Standards

Periodically, we review the travel expense reimbursement standards to ensure that they are reasonable. In this review process, data on travel costs is gathered from government and private sources. This data is used to update the travel standards.

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
TRAVELING IN U.S. AND CANADA

effective 5/26/93
supersedes ~~NEW~~

page 2 of 11

D.. Temporary Travel Advances

1. ~~Temporary travel advances~~ are available to those who travel only occasionally,, and are limited to the estimated cost of the trip.
2. ~~Temporary travel advances~~ may also be obtained when airline rules require that tickets must be purchased 21 days or more prior to the date of travel..
3. When submitting a Travel Expense Statement in which a temporary advance was used,, complete and process the form in the normal manner.. Deduct the travel advance from the amount due you..
4. ~~Temporary travel advances~~ may be obtained through your supervisor on request..

E.. Promotional Rebates.. Coupons and Frequent Flyer Awards

Occasionally,, organizations will offer promotional coupons,, free trips,, rebates,, etc. which can be applied against the cost of future airline flights,, stays at hotels or motels,, car rentals,, restaurants,, etc. Since the CIJE pays for travel expenses resulting from authorized trips,, such things are the property of the CIJE and should be processed as follows..

1. When a cash rebate is received,, the amount of the rebate should be noted on the itemized invoice and used to reduce the cost of the service. The amount shown on the Travel Expense Statement will then reflect the net cost,, after the rebate.
2. Any rewards realized from frequent flyer programs are for the benefit of the CIJE,, and are to be used for CIJE trips. This is true for any coupons or other rebates.

IV. AIR TRAVEL

- A. All air travel will be on commercial lines. Use of private aircraft or charter airlines is not permitted. Least Cost Routing should always be used.
- B. The back-to-back ticketing technique should be used to obtain discounted air fares when a traveler knows in advance that there is a need to repeat a trip between cities. Back-to-back ticketing is defined as the purchase of two tickets covering travel to the same city on two different occasions. All back-to-back tickets will be billed directly to the CIJE by our travel agent. Therefore,, no reimbursement for these airline tickets is expected. See Exhibit A, No. 3 for reporting such expenditures.

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
TRAVELING IN U.S. AND CANADA

effective 5/26/93
supersedes NENEW

page 3 of 11

C. Charges for excess baggage are not reimbursable unless the excess baggage is extra equipment required for a specific assignment.

D. Travel To and From the Airport

Travelers are expected to utilize the most logical, and practical, least-cost method of travel to and from the airport.

V. GROUND TRANSPORTATION

A. Travel by Private Car

1. When it is appropriate to use your personal car for CIJE business, a mileage/kilometer allowance (see authorized rates on Exhibit B) is authorized to cover all expenses except for:

- a. Toll charges - reimbursed at actual cost.
- b. Parking - reimbursed at actual cost. At airports, charges are not to exceed the maximum long-term daily rate at the airport.

B. Receipts

1. A receipt for paid ground transportation (bus, courtesy van, taxi, etc.) is required when the expenditure for any one occurrence exceeds \$10.00.
2. A receipt for parking charges and toll charges over \$4.00 is also required.
3. As a general rule, obtain receipts wherever practical to do so.

VI. CAR RENTAL

A. Reservations

All rental car reservations must be made through our authorized travel agent. Generally, a compact car will be rented.

B. Insurance

When renting a vehicle, you should always take the collision protection charge and other forms of insurance coverage. You should not waive any coverage.

C. Gasoline

Gasoline purchases for a rental car are to be added to the vehicle cost and entered as a single total recorded in the "Car Rental

Expense" block. Travelers are asked to fill up rental cars when returning them, to avoid incurring the excessive gasoline charge made by rental companies..

VII. HOTEL ACCOMMODATIONS

- A. All travel reservations for accommodations should be made as per the instructions given you.
(To be developed)
- B. Single minimum rate rooms will generally be used.
- C. Charges are to be paid by you upon checking out. They should not be billed to the CIJE.
- D. Note: We do not provide reimbursement for any "guaranteed reservations" that were not cancelled due to your error.
- E. Laundry and valet expenses are reimbursable if you are away from home on CIJE business at least six consecutive days.

VIII. MEALS

- A. The actual amount spent on meals is reimbursable up to the maximum limits listed in Exhibit B. Tipping is not separately reimbursable as it is covered in the meal allowance.
- B. Please note that there are three levels of meal expenses. We expect you to follow the standard level when you can. We have published two additional levels, and ask you to use your judgment as to which level to follow. As a guide, we would expect the following.
 - 1. Use the standard level, as a general rule.
 - 2. When you are unable to conveniently take your meals in "reasonable" restaurants, you may use Level 2.
 - 3. In certain large cities, for example, New York or Los Angeles, you may find it necessary to use Level 3.
- C. Meal costs must be itemized daily on your Travel Expense Statement. All personal meals and all outside guest meals require a receipt. Tips to a maximum of 15% should be added to the receipt when they are not included.

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
TRAVELING IN U.S. AND CANADA

effective 5/26/93
~~supersedes~~ NEW

page 5 of 11

D. Reimbursement for meals is only authorized when you are away from home overnight or in the following instances::

1. BREAKFAST When required to eat away from home due to CIJE business (i.e., meetings, training sessions, etc.)
2. LUNCH When you are working more than 30 miles//48 kilometers from your base office. NOTE: If you work out of your home, that is your "base office."
3. DINNER When you must work past 7:00 p.m. away from your home, or when performance of job duties, due to travel, prevents you from being home by 7:00 p.m. In both instances, a meal expense must be actually incurred.

E. Meals held as a "convenience" with other CIJE personnel in your home city are not reimbursable.

F. The consumption of alcohol creates a potential hazard to the health and safety of all. Accordingly, alcoholic beverages are not appropriate and are not reimbursable.

G. When this is necessary in your judgment, you will be reimbursed in full for your guest's expenditures. Please note: ordinarily this will not include alcoholic beverages.

H. If, in line with CIJE business, you dine with another CIJE employee or consultant, each should pay for his or her own meal except when entertaining guests ((See Section IX)).

IX. ENTERTAINING GUESTS

If, in line with CIJE business, you have a meal with other non-CIJE personnel, it may be appropriate on occasion for you to pay for the whole check.

- A. As a general guideline, the price of such meals should follow our normal meal allowances. However, this may not be practical in all situations or locations. In such instances, good judgment should be exercised, and explained on your expense report. Note: The total cost of your meal plus your guest(s) should be entered in the "entertainment and other non-travel expenses" category on the Travel Expense Statement.

SUBJECT: TRAVEL EXPENSES POLICY FOR PERSONNEL
TRAVELING IN U.S. AND CANADA

effective 5/26/93
supersedes NEW

page 6 of 11

B. Complete the "entertainment and other non-travel expenses" category on the back side of the Travel Expense Statement and include the following:

1. Date of expenditure
2. Name of establishment
3. Business purpose
4. Name, title and organization of all attendees (including CIJE employees) ..
5. Amount

C. Attach a receipt showing the amount and the name of the establishment..

X. TELEPHONE COMMUNICATIONS

Charges

- A. Telephone charges should be itemized on your Travel Expense Statement by identifying the person or organization called.
- B. Direct dialing should be used to take advantage of the lower rate offered. An operator assisted call increases the cost of a phone call and should be avoided.

XI. NON-REIMBURSABLE ITEMS

The following expenses are not approved unless specifically authorized in advance, and individuals incurring them will do so at their own expense:

- A. Office equipment or tools.
- B. Any cost associated with cellular telephones, including equipment acquisition, installation, maintenance, usage and service fees.
- C. Excess baggage charges, unless the excess baggage is equipment required for a specific assignment.
- D. Mileage/kilometer charges on personal car for personal travel.
- E. "Guaranteed" reservations that are not used and were not cancelled due to your error.
- F. Tipping for meals, as this is included in the meal allowance.#

STANDARD INSTRUCTIONS FOR COMPLETING
TRAVEL EXPENSE STATEMENT

no. 2.1
page 7 of 11

Note: Travel expense Statements must be completed in ink.

1. Enter the address where the check should be mailed.
2. Specifically state the purpose for your travel. For example:

"To meet w/consultants in N.Y., on ((Date))."
or, "To attend conference in Toronto,, on ((Date))."
3. Enter the amount of airline tickets obtained or provided to you by the CIJE on a prepaid basis. Attach the "original passenger receipt" copy(s) and the travel itinerary provided by our authorized travel agent to the back of the statement.
4. ~~Note: All unused airline tickets should be attached to the front of the statement. This includes CIJE prepaid tickets as well as non-refundable tickets that were charged to the traveler.~~
5. Date of travel.
6. City travelled from.
7. City travelled to.
8. Amount of airline tickets which you used. Attach the passenger receipt copy(s) and the travel itinerary provided by our authorized travel agent to the back of the statement. In lieu of the original passenger coupon, attaching a clear photocopy ((when possible)) of the ticket with a note explaining the circumstances will be acceptable in the following situations.
 - a. When the original passenger coupon must be surrendered to the travel agent or airline to obtain credit for a ticket which was only partially used.
 - b. When "back-to-back" tickets have been obtained to qualify for discounted airline fares. In this case, the second copy of each of the two tickets will not be used until the second trip is taken. This requires that the "passenger receipt" of each ticket may not be torn out until all segments of each ticket have been used.
9. Total amount of personal auto expense incurred for each day as detailed on the reverse side of the statement.
10. ~~In the event it is necessary to rent a car for CIJE business purposes, a compact car will be rented through the authorized travel agent and the amount of the rental plus fuel purchased entered here. The car rental agreement, gasoline receipt(s) and the travel itinerary, provided by our authorized travel agent must be attached to the back of the statement. See Section VI for detailed guidelines on car rental.~~
11. ~~Amount of local transportation as detailed on the reverse side.~~
12. ~~Motel and hotel charges are to be paid for by you upon checking out. See Section VII for detailed guidelines on accommodations.~~

13. Meals

- a. Current meal standards are listed on Exhibit B.
- b. See Section VIII of this policy for detailed guidelines on reimbursement of meal expenses.

14. Costs incurred for business related postage.

15. Telephone

- a. Telephone charges should be entered here and detailed on the reverse side.
- b. If no receipt is available, the calls should be listed on the reverse side of the Travel Expense Statement in the space provided as shown in Exhibit A-1.

If a receipt is available, indicate the name of the person and city called next to each charge on the receipt.

- c. Include original copy of any charge card billing with the name of the person called next to each charge.

16. Amount of all other reimbursable expenses should be entered here and detailed on the reverse side.

Note: Entertainment expense detail should be detailed as indicated on Exhibit A-1.

17. Daily total of reimbursable expenses.

18. Deduct the amount of travel advances you received, if applicable, and determine the amount due to or from the CIJE.

- a. If you spent more than the advance, deduct the amount of the travel advance from the total expenses and show the balance to be reimbursed.

- b. If the travel advance exceeds the expenses incurred, please submit your check with your Travel Expense Statement to repay the advance.

19. Submitter must sign here. Submit to designated approver who will approve and submit directly for reimbursement. No expense statement will be processed if the submitter's signature is missing.

20. Detail expenses incurred for the use of your personal car.

NOTE: Beginning and ending daily mileage/kilometer readings must be entered on the reverse side of the Travel Expense Statement in the space provided. Always record your car's total beginning and ending mileage, for example, beginning 26,152 - ending 26,247.

21. Original receipts should be attached to your Travel Expense Statement. Photo copies are not acceptable.

CIJE

TRAVEL EXPENSE STATEMENT

ENTITY/PROJECT

WEEK ENDING - SAT

NAME (PRINT)

Albert Adams

ADDRESS

123 Main St

CITY

Anytown

STATE

OH

ZIP

44101

P O

MON.

U F

TUE.

R

WED.

To meet with consultants in N.Y.

P T

THUR.

To attend conference in Toronto

O R

FRI.

S I

SAT. and/or SUN.

E P

NON-REIMBURSABLE AIR TRAVEL CHARGED TO MAF

(ATTACH RECEIPTS)(SEE NOTES 1 & 2)

(3)

\$

	SUN.	MON.	TUE.	WED.	THUR.	FRI.	SAT.	TOTALS
DATE (5)	1/12	1/14	1/15	1/16	1/17	1/18	1/19	
FROM (6)				Anytown	Anytown			
TO (7)				Anytown	Anytown			
AIR TRAVEL (SEE NOTE NO. 2)	(8)				200.00			200.00
AUTO EXP. OWN CAR (DETAIL ON REVERSE SIDE)	(9)			3.60	7.85			11.45
CAR RENTAL EXPENSE (INCLUDE PURCHASED GAS)	(10)							
OTHER TRANS. (DETAIL ON REVERSE SIDE)	(11)			5.50	5.50			11.00
LODGING	(12)				35.00			35.00
BREAKFAST	(13)				3.50			3.50
LUNCH				4.25	4.00			8.25
DINNER								
POSTAGE	(14)							
COMMUNICATIONS (DETAIL ON REVERSE SIDE)	(15)				2.25			2.25
ENTERTAINMENT AND OTHER NON-TRAVEL EXPENSES (DETAIL ON REVERSE SIDE)	(16)			17.75				17.75
TOTAL - (EXCLUDE NON-REIMBURSABLE ITEMS)	(17)			31.10	258.10			289.20

LESS ADVANCE (if applicable)

100.00

AMT. DUE MAF (attach check)

(18)

AMT. DUE FROM MAF

189.20

NOTES:

1. Attach unused, company-paid tickets to the front of this report.
2. If this flight was not the least expensive, please explain why.

3. Attach receipts for Air Travel, Lodging and all other appropriate receipts.
Failure will delay reimbursement per Travel Policy.

4. Fill out this report completely. Expenses will not be reimbursed when a report is incomplete.

I hereby certify that all of the above listed expenses were authorized
amounts incurred in connection with my official MAF duties.

(19)

Albert Adams

1/21/91

Date

Approved by (Print)

Virgil Vogel

(SIGN)

Virgil Vogel

1/21/91

Date

AUTO EXPENSE - OWN CAR

	SUN.	MON.	TUE.	WED.	THURS.	FRI.	SAT.	TOTALS
1/13	1/14	1/15	1/16	1/17	1/18	1/19		
FROM				Home	Airport			
				Airport	Home			
METER				36.152	26.167			
METER				24.167	26.182			
ISOMEN				15	15			30
AGE RATE				.24	.24			.24
FACE EXPENSE				3.60	3.60			7.20
ONG					4.25			4.25
US								
TOTAL AUTO EXP.				3.60	7.85			11.45

(1f) 0

OTHER TRANSPORTATION - TAXI, LIMO, BUS, OTHER (ATTACH RECEIPTS)

	SPECIFY TYPE	FROM	TO	AMOUNT
1/16	airport limo	airport	ABC Foundation	5.50
1/17	airport limo	ABC Foundation	airport	5.50

(s)

COMMUNICATIONS (ATTACH RECEIPTS)

M	TO	PERSON CALLED	REASON	AMOUNT
airport	office	Mr. HODIS & S.	charge for mess & 105	2.25

(16)

ENTERTAINMENT AND OTHER NON-TRAVEL EXPENSES (ATTACH RECEIPTS)

E	PLACE	BUSINESS PURPOSE	NAME, TITLE, COMPANY OF INDIVIDUALS	AMOUNT
1/16	Golden Palace	Consulting	B. Adams, Director, ABC Foundation	7.75

ATTACH ALL RECEIPTS, OTHER THAN UNUSED AIRLINE TICKETS. ATTACH UNUSED AIRLINE TICKETS TO THE FRONT.

ATTACH ALL RECEIPTS, OTHER THAN UNUSED

Exhibit B

TRAVEL ALLOWANCES
UNITED STATES

	<u>STANDARD LEVEL</u>	<u>LEVEL 2</u>	<u>LEVEL 3</u>
Breakfast	\$ 5.75	\$ 6.00	\$ 7.50
Lunch	\$ 5.75	\$ 8.00	\$ 10.00
Dinner	\$ 14.00	\$ 17.50	\$ 25.00
Mileage	24 cents/ mile	24 cents/ mile	24 cents/ mile

CANADA

TO BE DETERMINED

I. PURPOSE

The purpose of the Position Description Questionnaire (see Exhibit A-CIJE-302) is to provide a complete description of project positions. The original position description questionnaire should be maintained in the personnel file of each CIJE employee or consultant.

II. POLICY

The PDQ provides a standard format for recording job content and responsibilities. This information is then used to evaluate positions and to serve as a guide during the annual job progress review.

III. UPDATE

The PDQ will be reviewed annually. The update will be done by the incumbent with approval from his/her supervisor. The annual review will be added to the personnel calendar of events.

IV. GUIDELINES FOR COMPLETING

- A. The questionnaire should present the position the way it was intended to be performed and should not be "tailored" to meet the capabilities of the current incumbent.
- B. Descriptions should be brief, concise and clear and describe not only how and what is done but, where possible, why it is done. Incidental or occasional duties should be left out. #

CIJE
POSITION DESCRIPTION QUESTIONNAIRE

NO. 3.1
page 2 of 4
effective 6/1/93

INCUMBENT'S NAME

DATE

POSITION TITLE (Indicate if Consultant)

WORKING LOCATION (City)

REPORTS TO: NAME, TITLE

1. MAIN FUNCTION

What is the primary purpose of your position? Limit your answer to one or two sentences.

Guidelines for Completing Section 1.

This section should be a brief statement of the general function or purpose of the position and its primary objective. In other words, why the job exists in the organization and what wouldn't be accomplished if the position did not exist?

2. DUTIES AND RESPONSIBILITIES

What are the major tasks and activities you perform in order of importance. What is the approximate percentage of time you spend on each task.

Guidelines for Completing Section 2.

This section details the key responsibilities and activities of the position. It describes what the incumbent does to accomplish the job.

RESPONSIBILITIES

TIME (%)

A:	_____	_____ %

B:	_____	_____ %

C:	_____	_____ %

3. SUPERVISION OF OTHERS

A. What positions (and how many incumbents in each) do you have direct supervisory responsibility for?

B. List any other positions for which you provide guidance that do not report directly to you.

4. FINANCIAL RESPONSIBILITIES

Please list any financial or budgeting responsibilities.

5. EDUCATION REQUIREMENTS

What is the specific level of formal education and type of degree required to perform this job. Describe any special requirement unique to this position.

6. WORK EXPERIENCE

List the prior positions that are necessary background to qualify for this position. Also, state the approximate length of time needed in each position.

NOTE: Number 5 and 6 should describe the educational and work qualifications of a successful candidate, not necessarily the background of the present incumbent.

7 CONTACTS

Please indicate the highest level of your internal and external contacts that occur regularly and the nature of the interaction.

8. OTHER INFORMATION

Please include any other information which you feel is important to understanding this position.

Guidelines for Completing Section 8.

This section may be used to describe the environment within which the job operates and identify the position's major challenges. It is important to direct the comments to the role of the position and not the performance of the incumbent.

	<u>Signature</u>	<u>Date</u>
Employee/Consultant	<hr/>	<hr/>
Supervisor	<hr/>	<hr/>
Approver	<hr/>	<hr/>

I. OBJECTIVE

To provide guidelines for developing and approving consulting agreements..

II. SCOPE

The guidelines within this policy are meant to apply to individuals or firms who provide assistance on a specific project or ongoing program.

III. POLICY

- A. A consultant engagement must be authorized in a planned and controlled manner. Before engaging a consultant, there must be a Consultant Employment Form (CIJE 312) filled out and approved.
- B. Consulting agreements may either be established for a specific assignment or for a fixed period of time. See Exhibit A for a checklist of factors that should be considered when defining the terms and scope of the consulting job.
- C. Written proposals should be obtained from all prospective consultants clearly setting forth the items listed on Exhibit A.
- D. Payments to consultants will only be made upon the rendering of an invoice for services by the consultant appropriately approved or unless otherwise specified in the Consulting Agreement. The support must clearly set forth items A through L of Exhibit A.
- E. At the completion of the assignment or on a periodic basis, if appropriate, an evaluation of the quality of the work versus the project plan should be completed.
- F. Any renewals of consulting agreements or changes to terms (e.g. financial arrangements) must follow all procedures above.#

CHECKLIST FOR USE WHEN ENGAGING A CONSULTANT

- A. The city and country in which the work is to be performed.
- B. The country of citizenship for individuals or country of domicile if other than an individual of the payee of the service.
- C. The term of the consulting agreement.
- D. The provisions for terminating the consulting agreement, with or without cause and with how much advance notice.
- E. The consulting rates to be paid.
- F. The payment schedule (biweekly, monthly, etc.).
- G. The extent of any reimbursements for out-of-pocket costs. (Consultants will be expected to use the MAF travel expense guidelines.)
- H. Any other fees or charges.
- I. The currency in which payments are to be rendered.
- J. Location for checks to be sent should be provided.
- K. The tax identification number of the payee, if appropriate.
- L. The tax matters affecting the contract including the need to withhold income taxes or issue Internal Revenue Service form 1099.
- M. The documentation to be provided in support of billings.
- N. The scope of the project must be clearly defined in the engagement plan, and there should be a project time schedule.
- O. The format and frequency of progress meetings should be clearly defined.

INSTRUCTIONS FOR COMPLETING THE CONSULTANT EMPLOYMENT FORM (CIJE 312)

The purpose of the Consultant Employment Form is to capture all pertinent information relating to the consulting agreement set forth. Please complete this form in a clear and concise manner. This should be completed by the consultant's supervisor.

1. Payee refers to the consultant we are paying. Please print full name clearly.
2. Payee ID# is the U.S. Social Security number or the employer ID number.
3. Payment address can be the consultant's home address or other address where he/she would like to receive payment.
4. Please indicate entity such as CIJE and, if a specific project is involved, list the name of the project, e.g. Monitoring, Evaluation and Feedback.
5. Briefly summarize the project the consultant will be working on, even if it is not one of the "named" projects mentioned in 4. E.g., project to determine feasibility of developing a survey for all Lead Communities.
6. Please indicate the date the consultant's work should begin. Payment will begin starting at that date. Also include date you anticipate the consulting assignment will be completed.
7. Please list the supervisor or person who will oversee the consultant's activities.
8. Please indicate the amount of money to be paid to the consultant in dollars per day, month, year. Also indicate how frequently the consultant will be paid, i.e., monthly, quarterly, as billed.
9. Please indicate whether we will have to withhold taxes. Also indicate country where consultant is a citizen.
10. Terms/limitations should include any information describing the terms of the agreement e.g., consultant will be paid \$500/day up to \$5,000 per year or consultant fees will not exceed \$7,500 for the duration of this project.

EXHIBIT B

no. 3.2

effective 4/1/93

page 4 of 5

11. Payor will generally be CIJE but it may be another source of payment. Please indicate clearly who will be paying the consultant.
12. In some cases the consultant will need to bill the CIJE either monthly or as work is completed. In these cases, you should check "yes."
13. Please indicate whether this consultant has any current assignments with the CIJE or has done consulting work for the CIJE prior to this assignment. Also indicate what the assignments were and when.
14. Please use the section on comments to provide further explanation on any aspect of the arrangement or for clarification of any section above.
15. The submitter should be the person completing this form, generally the supervisor of the consultant.#

CONSULTANT EMPLOYMENT FORM

EXHIBIT C
no. 3.2
effective 4/1/93
page 5 of 5

Payee 10 Date _____

Payee ID# 2 (If U.S. citizen) If no, indicate country of citizenship _____

Payment Address 10 _____

Consultant to be used by (entity, project) 10 _____

Brief summary of project 5 _____

Desired Starting Date 51 Desired Completion Date _____

Person responsible for overseeing consultant's activities 22 _____

Suggested fee arrangement: 8

\$ Amount _____ per _____ Frequency of payment _____
(day, mo., yr.)

Tax withholding required? 9 yes _____ no _____ Country _____

Terms/Limitations 15 _____

Payor an _____

Is on-going bill required? 12 yes _____ no _____ How often? _____

Any current or prior assignments with us? 10 _____

Comments 14 _____

Submitted by 152 Date _____

Knowledge Center Approval _____ Date _____

Financial Approval _____ Date _____

Operations Approval _____ Date _____

Final Approval _____ Date _____

I. PURPOSE

The purpose of this policy is to outline the procedures required to order books, publications and other documents. No publications should be ordered without prior approval.

II. PROCEDURE

- A. To order any publication, complete form CIJE 4011 (3/93). Make a machine copy of Exhibit A and complete it.
- B. When listing the publisher be sure to include address, telephone, fax and any pertinent information to facilitate contact should questions arise.
- C. The first approver will review the form to ensure that all information is complete and clear, and confirm that the request is justified.
- D. The Operations Approver will then receive the form for his signature.#

PUBLICATIONS APPROVALS FORM

no. 4.1
EXHIBIT A

page 2 of 2

Publication Title _____

Description of Publication _____

Proposed Use _____

Request to Purchase

Quantity Requested _____

Purpose _____

Publisher _____

Address _____

Phone _____ Fax _____

Submitted by _____ Date _____

Knowledge Center Approval _____ Date _____

Financial Approval _____ Date _____

Operations Approval _____ Date _____

Final Approval _____ Date _____

FOR INSERTION IN: CIJE OPERATIONS MANUAL
>
SUBJECT: INSTALLATION OF SERVICES OR
EQUIPMENT FOR PHILANTHROPIC PROGRAMS

no. 4.22
effective 3/22/93
supersedes NEW
page 1 of 2

I. PURPOSE

The purpose of this policy is to outline a procedure for getting approval to install equipment or services for any philanthropic program.

II. PROCEDURE

As new or existing programs are developed as part of the philanthropic program, the need to install services or equipment for efficient operation may arise. The following procedure should be followed to gain approval.

- A. Complete form CIJE 402. The submitter should forward it to the office manager of the philanthropic program.
- B. The office manager will review the form for completeness, make a recommendation and forward it to the financial approver.
- C. The financial approver will review the form for accuracy and other financial considerations and send it to the final approver for signature. #

APPROVAL FOR INSTALLATION OF SERVICES OR EQUIPMENT

Philanthropic Programs

Philanthropic Program _____

Service/Equipment Requested _____

Purpose _____

Suggested by _____

Options and Costs ((Use additional sheet if necessary))

1. Describe, including costs _____

2. Describe, including costs _____

3. Describe, including costs _____

Submitters Recommendation _____

Office Manager's Recommendation _____

Submitted by _____ Date _____

Knowledge Center Approval _____ Date _____

Financial Approval _____ Date _____

Operations Approval _____ Date _____

Final Approval _____ Date _____

Subject: SCHEDULING OF MEETINGS FOR
LEAD COMMUNITIES

I. PURPOSE

To facilitate the scheduling of meetings that require the participation of CIJE board members, staff or consultants.

II. POLICY

Meetings with Lead Communities that involve CIJE board members, staff or consultants should be set up through the CIJE office. For example, as Baltimore schedules an event to launch its Commission on Jewish Continuity, CIJE is asked whether certain consultants and board members could attend on particular dates. The CIJE staff person in closest contact with Baltimore should get the list of proposed dates and CIJE representatives and forward that information to Virginia Levi. VFL will check dates with CIJE representatives and pass the results on to the community.#

FOR INSERTION IN: CIJE OPERATIONS MANUAL

nb9. 5522

effective 7/1/93

Subject: WRITTEN COMMUNICATION WITH LEAD
COMMUNITIES

supersedes NEW

page 1 of 1

I. PURPOSE

To ensure that any document drafted by a CIJE staff member or consultant for distribution to a Lead Community or the public receives prior approval.

II. POLICY

Any document which is drafted by a CIJE staff member or consultant for distribution beyond the core group must be submitted to CIJE, Cleveland, Attention Virginia Levi. VFL will obtain approval prior to distribution. This refers to any materials which will be used in one or more of the Lead Communities, or for distribution to the general public. #

I. INTRODUCTION

In order for the work of CIJE to proceed in a coordinated fashion,, specific individuals will be designated to be in direct contact with the Lead Communities for particular purposes.. Any other member of the CIJE team who requires information about the work for which a designated individual is responsible should go directly to that person. If there is the need to speak to a Lead Community representative for further detail,, the designated contact person will arrange for a call to take place..

II. PROCEDURE

Following is a list of contact people and their areas of expertise.. Any information on these subjects should be obtained by going first to the designated contact..

A. Lead Communities Staff Person

1. Planning for the Lead Communities project..
2. Establishment and work with local commissions..
3. Matters related to educational programs in the Lead Communities..

B. Adam Gamoran

1. Monitoring, Evaluation and Feedback project..
2. All contacts with the field researchers..
3. Work related to the educators survey..

C. Barry Holts

1. Pilot projects..
2. Research and implementation of best practices..

D. Steve Hoffman

1. Community/CIJE Relationships..
2. Funding issues.#



CLAL

The National Jewish
Center for Learning
And Leadership

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Chairman

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Aaron Ziegelman

FOUNDERS
Rabbi Irving Greenberg
Elie Wiesel
Rabbi Steven J. Shaw

12 Tishri 5754
September 27, 1993

Mr. Morton L. Mandel
Council for Initiatives in
Jewish Education
PO Box 94553
Cleveland, OH 44101

Dear Mort,

It is with pleasure that I write to inform you that CLAL has approved your grant request of \$50,000 for CIJE.

We share your enthusiasm for the potential to reshape Jewish education in North America.

With best wishes.

Sincerely,

Shoshana

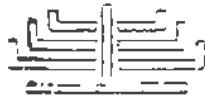
Shoshana S. Cardin
Chairman

It is a pleasure to be working with you - even if only peripherally!

cc: Alan Bayer
Rabbi Irving Greenberg
Harold Adler
Manny Batshaw

OCT 5 1993
MAH
CAF
SW
Fund raising
Al
1/2

Clare
7/18/93
JR



SA
All
SW
MIM- (A)

Atlanta Jewish Federation

1753 Peachtree Road, Northeast/Atlanta, Georgia 30309/404-873-1661/FAX 404-874-7043

6 Oct 1993

Post-It [®] brand fax transmittal memo 7671		# of pages = 2
To: Mort Mandel	From: David Sarnat	
Co.	Co.	
Dept.	Phone # 870-1608	
Fax # 216/381-5130	Fax # 881-4027	

Mr. Morton Mandel
Premier Industries
4500 Euclid Avenue
Cleveland, OH 44103

Dear Mort:

Just a brief note to bring you up-to-date as to who will be coming Sunday morning to Gerald and Helen Cohen's home. I will list the names with a thumb-nail sketch so you know who you will be meeting.

For your understanding, the participants were invited to hear your views on the issues of Jewish continuity and identity and, in particular, the impact that leadership can have in this important area.

The participants are:

Sidney and Clara Feldman

Erwin and Judy Zaban

M. William (Bill) and Eleanor Berman - senior leader in the community with a significant supporting foundation. He recently gave \$1 3/4 million to the Federation to build a Jewish Heritage Center.

Robert & Carol Nemo - Carol is the daughter of Bill Berman and is one of the founder's of a Reform Day School; very interested in the topic.

Ron & Lisa Brill - Ron is the #3 man at Home Depot and is beginning to get involved in the community. His wife, Lisa, is Vice President of the Jewish Community Center. Both are very interested in seeing how the JCC can relate to the topic.

Jay & Ann Davis - Jay is the son of Al Davis who, unfortunately, will not be in town for this event. Ann is an officer of the Federation. Jay and Ann gave \$1 million to the new Reform Day School.

Gerald (Jerry) and Pearlann Horowitz - Jerry is the president of the Federation.

PRESIDENT—Gerald D. Horowitz • FIRST VICE PRESIDENT—David N. Minkin

VICE PRESIDENTS—Jack N. Haipern, S. Stephen Seig III

TREASURER—Mark Lichtenstein • ASSISTANT TREASURERS—Elliott Cohen, Jody Franco

SECRETARY—Larry Joseph • ASSISTANT SECRETARIES—Candy A. Berman, Ann L. Davis

CAMPAIGN CHAIRMAN—Arnold B. Rubenstein, M.D. • EXECUTIVE DIRECTOR—David N. Sarnat

Mr. Morton Mandel
Page Two
6 Oct 1993

Dr. William (Bill) Schatten - Bill is a past president of the Federation and chairman of our Council on Jewish Continuity..

Harry Stern - Executive Director of the Atlanta Jewish Community Center..

Joseph (Joe) and Felicia Weber - Relative newcomers to the community. He is a major donor to our campaign. She is very interested in the issue of Jewish identity and continuity and is enrolled in a Master's program in Jewish studies at Emory University.

Marshall & Laura Dinerman - Laura is Erwin Zaban's daughter and president of the Atlanta Jewish Community Center..

I look forward to seeing you this coming weekend. We can make the arrangements for me to pick you up when we meet on Saturday evening at Bill Schatten's home..

Best regards to Barbara..

Cordially,



David I. Sarnat
Executive

cc: Gerald Cohen
Steve Hoffman

Milwaukee Lead Community Project

Suggestions for the Agenda

Tuesday, November 16, 1993

I. Lead Community Initiatives

- A. What constitutes a Lead Community initiative?
- B. What funding opportunities are available nationally to support the development of local initiatives?

II. Personnel Issues

- A. What new and innovative programs have been developed by the National Training Institutions as a result of the Mandel Charity grants?
- B. How will these programs benefit the Lead Communities?
- C. What is the procedure for applying to these programs?
- D. Are there existing instruments/methodologies/indicators of progress that could be applicable to the assessment of Lead Community initiatives (especially in the area of personnel)?

III. The Population Study

- A. What kind of extrapolations could be used to inform our planning process?
- B. Can a special report be prepared as background information for our planning process?

IV. The CJP Commission on Continuity

- A. What is the impact of the CJP's Commission on Continuity

initiative on the Lead Community Project?

B. How do the two projects interact?

RC/mm

10/11/93

NRH

TO: Gail Dorph, Adam Gamoran, Ellen Goldring, Roberta Goodman,
Barry Holtz, Julie Tammivaara

FROM: Allan Hoffmann

SUBJECT: CIJE Operations Manual

DATE: November 9, 1993

Enclosed is a copy of the CIJE Operations Manual outlining administrative procedures for the CIJE. Please use it for the next several months and save your comments and suggestions. By March 1, 1994 we'll ask for your ideas and review the manual to incorporate those that are appropriate.

Please note that this manual does not take into account the existence of a New York office.

Feel free to direct any questions to Ann Klein, 216-391-1852.

Thanks.

5 YEAR OUTCOMES (FOR STUDY)

=====

- **UNIVERSAL IN-SERVICE TRAINING**
- **ALL PERSONNEL:: RAISED STANDARDS**
- **ONGOING FLOW OF PEOPLE-IN-TRAINING**
- **LEADERSHIP INVOLVEMENT**
- **MATERIAL ASPECTS DEALT WITH::**
 - OSALARY SCALE**
 - OUNIVERSAL BENEFITS**
- **PROFESSIONAL LIFE:**
 - OFULL-TIME**
 - ONETWORKING**
 - OBEST PRACTICES**
 - OISRAEL EXPERIENCE**

ONE YEAR OUTCOMES

=====

- ① **EDUCATORS SURVEY COMPLETED**
- ② **EDUCATORS SURVEY DISCUSSED**
- ③ **PLANNING COMMITTEE PREPARES ACTION PLAN**
- ④ **PERSONNEL SITUATION DISCUSSED IN COMMUNITY**
- ⑤ **2-4 PEOPLE IN FULL-TIME TRAINING**
- ⑥ **IN-SERVICE PILOT PROJECT**
- ⑦ **ISRAEL SEMINAR**
- ⑧ **EDUCATORS INVOLVED**
- ⑨ **ETC...**

PERSONNEL FOR LEAD COMMUNITIES

- 5 YEAR OUTCOME
- 1 YEAR OUTCOME
- MAPPING THE CURRENT SITUATION
- SETTING NORMS AND STANDARDS
- MAPPING RESOURCES
- CRITERIA :: WHAT IS SUCCESS
- ACTION PLAN
- EVALUATION

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

P.O. Box 94553, Cleveland, Ohio 44101

Phone: (216) 391-1852 • Fax: (216) 391-5430

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Seymour Martin Lipset

Florence Melton

Melvin Merians

Charles Ratner

Esther Leah Ritz

Richard Scheuer

Ismar Schorsch

David Teutsch

Isadore Twersky

Bennett Yanowitz

TO: Gail Dorph, Seymour Box, Adam Gamoran, Annette
Hochstein, Steve Hoffman, Alan Hoffmann, Barry
Holtz, Ann Klein, Shmuel Wygoda

FROM: Ginny Levi

DATE: October 19, 1993

Attached are the minutes of the CIJE Executive Committee and
Board Meetings of August 26.

Executive Director

Alan Hoffmann

MINUTES: CIJE Executive Committee

DATE OF MEETING: August 26, 1993

DATE MINUTES ISSUED: September 22, 1993

PRESENT:

Committee Members: Morton Mandel ((Chair), Mandell Berman, Charles Bronfman, John Colman, Mark Lainer, Matthew Maryles, Melvin Meriams, Charles Ratner, Esther Leah Ritz

Consultants and

Staff: Seymour Fox, Annette Hochstein, Stephen Hoffman, Alan Hoffmann, Virginia Levi (Sec'y)

I.. Introductory Remarks

The chair opened the meeting by expressing the regrets of Charles Goodman, Neil Greenbaum, David Hirschhorn and Lester Pollack for their inability to be present. He wished Mr. Hirschhorn a speedy recovery from his recent surgery.

Mr. Mandel expressed his pleasure at now having a full-time executive of the highest quality. He noted that Alan Hoffmann has taken a three-year leave from Hebrew University to direct the work of CIJE, effective August 15. He noted that Alan's acceptance of this appointment serves to validate the work of the Commission and he reported that one of the major tasks Alan Hoffmann will undertake is to identify his successor during his three year term.

The chair then expressed his gratitude to Seymour Fox, Annette Hochstein, Steve Hoffman, Art Rotman and the many people who have worked to bring CIJE along, in the absence of a full-time executive. He also expressed his gratitude to Shulamith Elster for two years of service to CIJE and reported that she has taken a position as Professor of Jewish Education at Baltimore Hebrew University. She will continue to have contact with CIJE in that capacity.

The chair concluded his remarks, noting that with a staff now in place, CIJE has the "engine" to move our efforts ahead.

II.. Progress Report

The chair then turned to Annette Hochstein for a report on progress since the February meeting. She noted that two major challenges had been raised at the last board meeting:

First: Since the creation of CIJE, first Steve Hoffman then Art Rotman guided the work of the organization, while continuing in their full-time positions. CIJE clearly needed a full-time professional head.

Alan Hoffmann has now accepted the top position.

Second: Concern had been raised about the slow progress in the Lead

Communities. Since February much progress has been made.

1. CIJE staff visited each of the Lead Communities several times between February and August,, working with local lay and professional leaders to move planning forward, and to begin laying concrete groundwork.
2. Two meetings between CIJE professional staff and representatives of all three Lead Communities were held during the six-month period. During the first meeting, agreement was reached on methods of working together and lines of communication. This has resulted in a much smoother process. The second meeting focused on content,, and resulted in a much better understanding of directions and mutual goals..
3. Within the Lead Communities the following has been accomplished:
 - a. A wall-to-wall coalition of lay and professional leaders has been or is being established in each community.. These have begun meeting in Atlanta and Milwaukee and the first meeting of the Baltimore group was scheduled for September.
 - b. CIJE has recommended that each community appoint a staff person to the project on a full-time basis.. Milwaukee has done so, Baltimore has given a current staff person responsibility for the project on a part-time basis, and Atlanta is searching for a person to staff the project.
 - c. All three communities have begun to identify issues, and project visions..
 - d. CIJE is working with Reform, Orthodox and Conservative denominational training institutions on how they can help their constituencies in the Lead Communities..
 - e. Both quantitative and qualitative surveys of personnel have been designed. They have already been administered in Milwaukee and are scheduled in Atlanta and Baltimore.. They should provide a complete picture of the current personnel situation in each community, and allow each to plan for its most pressing needs. Among the preliminary findings are the following:
 - (1) A very high proportion of Jewish educators has not visited Israel.
 - (2) The Jewish educators as a group are, in some communities, a more stable work force than previously thought. Their needs can thus be addressed more easily because of that stability.

As a result of the work of the past six months, the agendas of the Lead Communities are taking shape. Local leadership is

beginning to be mobilized for Jewish education. In addition, the communities are in the process of determining steps to take to improve the quality of their personnel.

Discussion

In the discussion that followed Esther Leah Ritz reported having met with Adam Gamoran, director of the Monitoring, Evaluation and Feedback Project. The project has begun to gather baseline data and documentation in each community. It looks at what is presently happening, and how the educational process works. This will help us understand and evaluate the process from its inception. Esther Leah noted that a field researcher has been placed in each of the communities and that the documentation of this start-up phase is complete. She suggested that the monitoring process serves as an "audit trail" and that we are building into each Lead Community the capacity for self-evaluation, through the feedback we can provide them.

A question was raised about the impact of the current recession on fundraising in the Lead Communities. It was suggested that a good idea will attract support, and that this has happened in Milwaukee. In times like this, communities have to make a decision about how to spend current dollars more effectively.

In response to a question about how people in the communities are reacting to outside intervention, it was reported that this is a joint learning process. There is a core of people in each community with a clear interest and desire to work closely with CIJE. We continue to work with that core to transmit the goals and standards of CIJE to a broader base of community members.

It was noted that we are breaking new ground on how a continental entity with a strong point of view can have impact at the local level. By agreeing to become Lead Communities, they have agreed to "buy in" to CIJE's idea of how they should operate. While the communities initially expected CIJE to come to them with "a pot of gold," despite frequent indications to the contrary, they are becoming clearer on CIJE's role in contributing expertise and a concept. The communities now understand and accept the centrality of the building blocks identified by the Commission: community mobilization and personnel. These will be among the top priorities in their strategic plans.

A question was raised about what denominational training institutions can do for CIJE. It was reported that they are being asked to provide improved training opportunities to meet the needs of educators currently in the Lead Communities. In addition to the training institutions of the movements, general universities can also be tapped. For example, Atlanta is working with Emory University to engage talented, interested faculty in the process. It was also suggested that the involvement of the movements goes beyond the training institutions to the other central educational organizations of each movement.

It was suggested that as new Lead Communities are identified, it would be useful to involve lay and professional leaders from the initial Lead Communities in order to help smooth the process.

III. Preliminary Review of Plans for 1993-94

Alan Hoffmann began his remarks by noting that his work with CIJE is a direct continuation of his work at the Melton Centre for Jewish Education in the Diaspora, of Hebrew University. Much of his work at the Melton Centre has related to the process of effecting change on an institutional basis. He looks forward to the opportunity to think about change for Jewish continuity through Jewish education on an even larger scale.

He also noted that the work of CIJE is being closely watched by those concerned with Jewish continuity in other parts of the world. What happens in North America will have a significant impact on what happens elsewhere in the world.

Alan noted that he begins his assignment with CIJE with a major asset: its highly competent staff. He introduced the members of the core staff as follows:

- A. Barry Holtz, who has been working with CIJE on a part-time basis, has now joined full-time. He will continue his work on best practices, in addition to other assignments, particularly supervising the introduction of pilot projects in Lead Communities.
- B. Gail Dorph has come from the University of Judaism, where she has been in the forefront of teacher training. She will be working closely with the Lead Communities.
- C. Adam Gamoran of the University of Wisconsin and Ellen Goldring of Vanderbilt University are coordinating the Monitoring, Evaluation and Feedback Project. Working with them are field researchers Roberta Goodman in Milwaukee and Julie Tammivaara in Baltimore. A new field researcher is being sought for Atlanta.
- D. Virginia Levi serves as the point of contact and "mission control" for the enterprise.

A second ring of staff includes the following consultants:

- E. Seymour Fox, working on visions and goals.
- F. Annette Hochstein, working with the Monitoring, Evaluation and Feedback Project.
- G. Steve Hoffman, working with community process.
- H. Daniel Pekarsky, helping communities and institutions to set goals and visions.
- I. Shmuel Wygoda, on personnel development.

Work Plan for CIJE

CIJE is much more than the Lead Communities Project. Its major objectives are the following:

is at the moment provided by the Mandel Associated Foundations. With Alan Hoffmann in place, a major undertaking will be to attract broad support.

We are happy with the broad acceptance of the centrality of Jewish education. CIJE now has the task of convincing the communities to "put their money where their mouths are." We need to figure out how to tap the funding that we know is there.

It was noted that we spent two generations trying to make Jewish youngsters more American. Now we are working to make our American children more Jewish. There is emotional resistance to be overcome.

V. The CRB Foundation's Israel Experience Program

Charles Bronfman reported that a new consortium has been formed with CJF and UJA and that four communities have been selected to serve as pilots. The CRB Foundation is providing financial support for the staffing of this project with emphasis on marketing. Communities are asked to fund the actual trips. A cooperative venture with the Joint Authority for Jewish Zionist Education is providing funding for educational encounters in Israel between Israeli and Diaspora youth.

A research project with the Melton Centre has been designed to evaluate the impact of trips to Israel. The results are now being evaluated. It appears that many trips lack a certain emotional element which this project hopes to fill by recruiting Israeli youngsters to participate with North American students on Israel trips.

VI. Adjournment

The meeting was adjourned at 12:00 noon.

MINUTES: CIJE BOARD MEETING

DATE OF MEETING: August 26, 1993

DATE MINUTES ISSUED: September 23, 1993

ATTENDANCE:

Board Members: Morton Mandel, ((Chair)), Daniel Bader, Mandell Berman, Charles Bronfman, John Colman, Billie Gold, Thomas Hausdorff, Gershon Kekst, Mark Lainer, Matthew Maryles, Melvin Merians, Charles Ratner, Esther Leah Ritz, Richard Scheuer, David Teutsch, Isadore Twersky, Bennett Yanowitz

Consultants and Staff: Gail Dorph, Seymour Fox, Adam Gamoran, Annette Hochstein, Stephen H. Hoffman, Alan D. Hoffmann, Barry W. Holtz, Ann G. Klein, Arthur Rotman, Jonathan Woocher, Shmuel Wygoda, Virginia Levi (Sec'y)

Guests: Chaim Botwinick, Robert Hirt, Richard Meyer, David Sarnat, William Schatten, Louise Stein, Paul Steinberg, Ilene Vogelstein

I. Welcome and Progress Report

The chair welcomed all participants in the meeting and introduced three new members of the board -- Billie Gold, President Elect of JESNA; Gershon Kekst, Chairman of the Board of the Jewish Theological Seminary of America; and David Teutsch, new President of the Reconstructionist Rabbinical College. He also welcomed the following guests from the Lead Communities: William Schatten, chair of Atlanta's Council of Jewish Continuity and David Sarnat, Executive of the Atlanta Federation; Ilene Vogelstein, Chair of the Committee of the Lead Community Project in Baltimore, and Chaim Botwinick, Director of Baltimore's Center for the Advancement of Jewish Education; Louise Stein, Co-chair of Milwaukee's Commission on Visions and Initiatives in Jewish Education and Richard Meyer, Executive of the Milwaukee Federation.

The chair expressed his pleasure in introducing Alan Hoffmann, newly appointed executive director of CIJE. Alan has taken a three year leave of absence from his position as director of the Melton Centre for Jewish Education in the Diaspora, of Hebrew University, where he has been since 1980. This is the largest academic training center in Jewish education in the world.

The chair noted his thanks to both Steve Hoffman and Art Rotman for getting CIJE off the ground while retaining their full time responsibilities with their own agencies. He noted his strong sense of optimism regarding the potential for positively impacting Jewish education under the leadership of Alan Hoffmann, as CIJE's first full time professional director.

II. Comments of Executive Director

Alan Hoffmann remarked that he looks forward to working closely with this board, many of whom he knows in other contexts. As a student of the process of change in Jewish education, he looks forward to having a central role in this bold new enterprise. At its heart is the belief that systemic change is possible at both the local and continental levels. By building a new generation of educators and mobilizing top leadership, we can build on the revolutionary climate which has arisen over the last ten years to seriously impact Jewish education.

He noted that the process CIJE has undertaken is a long one. He hopes during the three years of his assignment to lay a strong foundation, and looks to this board for its help and counsel.

A. CIJE has four clear objectives:

1. Build the profession - create a new generation of professionals and leadership for Jewish education.
2. Mobilize community support - bring to Jewish education a new generations of champions.
3. Establish a research agenda and secure funding for that agenda.
4. Establish Lead Communities as laboratories in which to implement reform for Jewish education based on building the profession and mobilizing community support.

B. Staffing

Alan noted that one of the attractions for him is the staff with whom he will work in this venture. He introduced the staff as follows:

1. Core staff

- a. Gail Dorph comes from the position of director of the Fingerhut School of Education at the University of Judaism. She will work full time with CIJE and will be the primary liaison to the Lead Communities.
- b. Barry Holtz has been consulting with CIJE while retaining his position as co-director of the Melton Research Center for Jewish Education at the Jewish Theological Seminary of America. He joins CIJE full time for two years and will

continue to direct the Best Practices project and work with the Lead Communities on the establishment of pilot projects.

- c. Adam Cameron of the University of Wisconsin and Ellen Goldring of Vanderbilt University co-direct the Monitoring, Evaluation and Feedback project. Working with them are Julie Tammiwaara in Baltimore and Roberta Goodman in Milwaukee, serving as full time field researchers. A field researcher for Atlanta is being sought.
- d. Virginia Levi will serve as administrative coordinator from the CIJE head office in Cleveland.

2. Consultants

- a. Seymour Fox - on the issue of vision and goals.
- b. Annette Hochstein - working with the monitoring, evaluation and feedback project.
- c. Steve Hoffman - advising on community development.
- d. Daniel Pekarsky - North American consultant on goals and vision.
- e. Shmuel Wygoda - on training opportunities in Israel

C. Lead Communities Project

Alan noted that a two day meeting in Baltimore had just concluded at which representatives of the three Lead Communities and CIJE had worked together intensively on the content of the project. This followed a similar meeting in May during which structural and process issues were resolved. We have learned that it takes time to understand, absorb and transmit the centrality of the building blocks identified by the Commission: personnel development and community mobilization. He listed the following challenges for CIJE:

1. How do we get on the community agenda? Can personnel and community organization be a way to organize local priorities in those communities which already have their own strategic plan for Jewish education?
2. We will soon have a diagnostic profile of educators in the Lead Communities. How can these be used to develop a plan for upgrading personnel?
3. How can we take the Best Practices documentation and research and translate it into projects in the Lead Communities? Elsewhere?
4. How can we help Lead Communities engage in the debate about the goals and outcomes of Jewish education?

5. How can we help Lead Communities raise the priority of Jewish education on the local funding agenda?

Alan concluded by noting that there is no recipe for quick change in Jewish education. It is a complex process which requires that we learn to talk carefully with one another. The Lead Communities are laboratories for demonstration. CIJE has yet to determine fully how to disseminate what is learned in these laboratories. This is the challenge that we face in the years ahead.

III. Lead Communities at Work

A. Project Overview

The chair introduced Charles Ratner, Chair of the Lead Communities Committee of CIJE. He noted that Mr. Ratner is an exceptional leader who cares deeply about the Jewish condition. Charles chaired Cleveland's Commission on Jewish Continuity which resulted in a new design for Jewish education in Cleveland.

Charles noted that the Lead Communities project aims to demonstrate the following:

1. What can happen, if funding, leadership, and planning coalesce on behalf of Jewish education.
2. How the two building blocks (personnel development and community mobilization) can be actualized within a community and what can occur if this happens.
3. The impact of using Best Practices as a curriculum for change.
4. To put monitoring and evaluation in place to show how the process is working.

Charles noted that the early euphoria of the selection of Lead Communities evaporated quickly, and was replaced by confusion on just what it meant to be a Lead Community. In the following months it was necessary to develop a common language, identify the tasks of the communities, and determine the role of CIJE. These initial steps have now been accomplished and a number of concrete steps have been undertaken.

1. A quantitative survey of educators has been administered in Milwaukee and is scheduled to be done in Atlanta and Baltimore this fall. It will provide us with rich data on the professionals in each community.
2. An ethnographic study of the "professional lives of educators" is being undertaken in each of the three communities and will provide us with qualitative information on the Jewish

educators of these communities: their background, attitudes, motivation, job stability.

3. The monitoring, evaluation and feedback project is well under way with field researchers in place and periodic reporting to the communities.
4. The Best Practices project has completed its first two studies and is working to use the reports to develop pilot projects in the communities.

An August meeting in Baltimore of the Lead Communities and CIJE staff was seen as a turning point for the Lead Community process. The communities have begun to strategize and prioritize, and joint work plans are being developed together with CIJE staff. The shared experience and pain of moving this process forward has led to a sense of mutual trust and partnership. Having been a part of the team that visited prospective Lead Communities and recommended the final selections, Charles noted his sense of the wisdom of selecting these three wonderful communities which are committed to succeeding. He noted that we are now ready to show the world what can happen when all of this comes together.

B.. Atlanta Update

The chair then called on Dr. William Schatten, chair of the Atlanta Council for Jewish Continuity, to report on Atlanta's progress. William noted that a planning process resulted in the recommendation to restructure the delivery of Jewish education service in Atlanta. A new organization has been created devoted to serving Jewish educators. Atlanta is now working to develop a program with Emory University for in-service training of Jewish educators.

The Atlanta Federation has undertaken a planning and coordinating role through the Council for Jewish Continuity of which Dr. Schatten is chair. The CJC is broadly representative of the lay and professional community in Atlanta. The CJC's work plan for the year involves teen trips to Israel, continuing professional education, and JCC programming in Jewish education as well as starting a long range planning process. An academic symposium with the Hebrew University on Jewish education is scheduled to take place in October. In addition, Emory University will offer a new masters program in Judaic studies in September 1994. William noted that with CIJE's help, Atlanta will continue on a path of positive change for Jewish education.

Discussion

In the discussion that followed William was asked whether the atmosphere in Atlanta is significantly different from that of a year ago. He noted that there is a sense of excitement in Atlanta as a result of this process. Many new beginnings have occurred including

the appointment of a director of the new Jewish Educational Services. Atlanta is at the point of moving from dream to reality.

Could the changes now occurring in Atlanta have taken place within the old structure? It was suggested that the previous structure was not meeting current community needs. With respect to the Jewish education services, insufficient attention was being given to the educators and educational institutions.

In response to a question about the relationship of the Council for Jewish Continuity and Jewish Educational Services to the Atlanta Federation, it was noted that the CJC is the education desk of the Federation for conceptualizing, planning, and coordinating. Among the activities it coordinates is the work of the JES.

C. Baltimore

The chair introduced Ilene Vogelstein, chair of Baltimore's Committee on the Lead Community Project. She noted that Baltimore had been involved in a number of activities prior to May 1993, when the Lead Communities and CIJE staff met. Before that time Baltimore was engaged in the development of a strategic plan which yielded 53 recommendations, 14 of which relate directly to personnel. Baltimore has also restructured its Center for the Advancement for Jewish Education, whose director staffs the CIJE project. Ilene also enumerated a series of educational initiatives which are in various stages of planning and implementation.

Following the May meeting of Lead Communities and CIJE, Baltimore established its wall-to-wall coalition of lay and professional leaders. It began a process of clarification of goals and procedures. Also following the May meeting, Baltimore participated in the design of the educators survey and began plans for its administration, scheduled for this fall.

For Baltimore, the August 23-24 meeting of Lead Communities with CIJE produced the following results:

- established a sense of team among CIJE and the three communities
- crystallized the concept of CIJE
- helped show how to interface Baltimore strategic plan with CIJE's goals

As a result, Baltimore staff and lay leadership are ready to move forward. In addition, a meeting of Reform rabbis and Jewish educators has been scheduled to discuss CIJE initiatives.

Baltimore sees itself with the following challenges as it moves forward with the CIJE project.

- The community expects that the Baltimore commission has a "pot of gold" ready to fund innovative ideas.
- The need to ensure psychological and systemic change rather than just the implementation of new program initiatives. Baltimore hopes to help its community to look at Jewish education differently.
- Immediately impact comprehensive retraining and professionalization of Jewish educators.
- Need principles and educational goals such as those being identified through the Best Practices project.
- Need to work to include people and organizations from outside the Federation system.

Ilene concluded by noting that Baltimore is very proud to be a Lead Community, is energized and ready to have a significant impact on Jewish education.

Discussion

It was noted that many people in the Lead Communities are aware that they have been selected to be Lead Communities, but beyond a small core, they are not clear on what that means. Communities need to communicate clearly what being a Lead Community is about.

Baltimore is responding to the financial challenge by establishing a Fund for Jewish Education. Milwaukee is working to go beyond the Federation in its search for financial support. It was noted that the mobilization of community support is critical to this funding so that financial resources are redirected to Jewish education. Baltimore agreed and indicated a conscious effort is being made to bring a range of people into the process.

D. Milwaukee

Louise Stein characterized the work of the Milwaukee Lead Community project to date as a tremendous investment of time, planning, learning and a leap of faith. She described Milwaukee as a "living laboratory for systemic change in Jewish education." Milwaukee began by identifying a project director and by raising questions within the community and with CIJE. A broad coalition of 60 community representatives was established and has begun meeting to identify issues and to establish a vision of the ideal Jewish community. It is defined as a community which provides an educating environment, where learning is life long, people are serious about their Judaism, and Jewish values are lived.

Two task forces have been established, one to work on personnel issues and the second to develop a strategic plan. A family education think

tank has been established. The quantitative survey of educators has been completed with an 86% return and analysis of the data is now in process. This will serve as the basis for planning by the personnel task force. In addition, Milwaukee is encouraging individual institutions to establish goals in conjunction with the Best Practice project. The Monitoring, Evaluation and Feedback project is beginning to provide valuable feedback information to the community which can be used to help move the community forward on a strategic plan through its task forces.

Milwaukee looks forward to forging ahead, working with the new staff of CIJE, sharing the common language forged at the recent seminar of Lead Communities. Louise concluded by thanking the Milwaukee Federation for its support, CIJE for its responsiveness and support as Milwaukee began this undertaking, and a deep appreciation to the Helen Bader Foundation for funding the project director to help move this process forward.

Discussion

The board was reminded that the denominational institutions of higher Jewish learning were involved in the work of the Commission and are represented on this board. They have been asked to prepare to work with their constituencies in the Lead Communities and to respond to requests from the communities for support.

It was noted that a substantial portion of the Jewish population is not actively involved with the institutions that make up the Jewish communal system. Has thought been given to reaching these people? It was noted that a number of Federations are working more closely with synagogues than they have in the past as a means of reaching out more broadly.

E. Conclusion

Charles Ratner indicated his belief that the Lead Community Selection Committee did a wonderful job, as evidenced by today's presentations. He continued, noting that Cleveland's experience with the identification of funding shows how important it is to dream these dreams.

Cleveland began by establishing a broad-based coalition which was asked to design a program without regard to funding. Over a period of three years, the process of "dreaming" moved ahead, involving a wide range of the community. Following the submission of a report, work began on the establishment of a funding coalition. Initially, this involved the Federation Endowment Fund and three private families for a total of 4 million dollars. Four years later, in a second round, 8 million dollars were committed for the next four year period. This involves the decision of the Federation to change how it funds Jewish education and the inclusion of an additional six families supporting the effort.

Moral of the story: If you put an exciting program in place, it will draw financial support. He noted that what is happening in the three communities is so worth while that it has to work.

The chair thanked the presenters, noting that after his working twelve years on behalf of Jewish education, these reports today proved that it was all worthwhile.

IV. Monitoring, Evaluation and Feedback Project

A. Introductory Remarks

Esther Leah Ritz, chair of the Monitoring, Evaluation and Feedback Committee, was asked to introduce this presentation. In doing so, she noted that the consultants working with CIJE from the University of Wisconsin epitomize the high quality people involved in the world of general education who are being attracted to Jewish education by the CIJE. She introduced Dr. Adam Gamoran, Professor of Sociology at the University of Wisconsin since 1984. He is interested in tracking in public education and has just returned from a year in Edinburgh, Scotland where he had been working on a Fulbright scholarship.

B. Project Update

Adam Gamoran asked: How will we know whether Lead Communities are successful in creating change? How will we understand the barriers and how they are surmounted?

We need an evaluation project in order to create useful knowledge -- to disseminate the learning of this experiment. We also need evaluation to provide the individual communities and CIJE with feedback as well as to facilitate reflective practice within the Lead Communities. We are asking the communities to take the time to think systematically about what they are doing so that we can always be finetuning and improving on our work. It is our hope that this process of constant review and revision will become a norm in the Jewish community.

During the past year, as the Lead Communities were selected and established, the MEF project was involved in documenting the process of engaging the communities. This first year was one which focused more on community dynamics than on education.

A field researcher was assigned to each community. Their job, initially, was to document the extent and nature of community mobilization for Jewish education, to characterize the lives of Jewish educators in the communities, and to determine the visions and goals of the communities for Jewish education. Working with the communities, they developed and began to implement interview protocols to study the lives of Jewish educators in the communities. They also developed a survey of educators which is now being administered and the results analyzed. In addition, they are providing the

communities with a fresh perspective and the interpretation of an outsider as they move forward with the project and are keeping CIJE informed of what they are learning.

In looking at the characteristics of Jewish educators, the researchers have been conducting interviews to provide a sense of how people feel about their work. They are now preparing in depth analysis of these interviews which will result in a written report of their findings. The reports will be policy oriented, their purpose to help the communities determine future directions.

For example, the qualitative study is showing that substantial numbers of Jewish educators have had little or no formal training. While communities offer a wide range of professional development experiences, these are often sporadic and the likelihood of attracting the untrained educators is uncertain. These two findings, viewed together, raise the concern that many educators are getting neither pre-service nor in-service training.

During the year ahead the Monitoring, Evaluation and Feedback project plans to:

1. Continue ongoing monitoring and feedback. Specifically, the plan is to document the process of articulation of goals and to develop measures by which the process can be assessed; to monitor the progress in establishing broad-based community coalitions for Jewish education; and, having established a base line on the lives of educators, to evaluate change.
2. Become more deeply involved in the process of community self-study.
The researchers will work with the communities to develop profiles, looking at the institutions for information on the participants, program components, supporting resources, and sources of financial support. This should lead, over time, to needs analyses and market surveys.
3. Seek assessment instruments for use in measuring outcomes.

Adam noted that the project will be successful if each Lead Community comes to realize the centrality of evaluation in its work.

Discussion

When asked whether base-line interviews have been conducted with members of the wall-to-wall coalitions, Adam noted that some interviews had been conducted. However, interest has been raised in the ripple effect of people's involvement with the coalition, i.e. the extent to which they are taking our ideas back to their home agencies. This has not been studied but should be in the future.

It was reported that there will be an evaluation component of each project in the communities which is clearly identified as a "Lead Community project." Early in the process, the emphasis was on monitoring and evaluation. As the field researchers have moved forward, their role has changed to some extent from observing only to becoming somewhat involved in the community process. It was noted that now that CIJE staff is in place, the role of the field researchers will return primarily to that of an observer.

Esther Leah Ritz concluded by noting her hope that this process will help us develop the capacity for long term studies of the impact of our work. will

V. Best Practices Project

A. Introductory Remarks

John Colman, chair of the Best Practices committee was asked to introduce this presentation. He noted that we are lucky to have Dr. Barry Holtz directing the Best Practices Project, on leave from his position as co-director of the Melton Research Center for Jewish Education at the Jewish Theological Seminary of America. He described Barry as a man of broad scope, skepticism, and the modesty of a trained clinician. He referred to the July 13 written update on the Best Practices project (included in materials circulated to the Board) as a good review of the complexities of the project. The method that has been developed of continuous analysis, feedback and application is vital to the work of CIJE.

B. Project Update

In light of the day's focus on the Lead Community enterprise, Barry indicated his intention to look at the relationship of the Best Practices project to the Lead Communities. He noted that the Best Practices project is a means of establishing a research base by documenting success stories in Jewish education. At the same time, the project is intended to introduce new ideas (best practice) into Jewish educational practice. The project is intended to establish standards of quality.

The project has identified nine areas for study in Jewish education. The first volume on Best Practices in Supplementary Schools was completed in January, 1993. A second study on Best Practices in Early Childhood Education has just been completed and was available at the meeting. Each of these studies will be rewritten in greater depth in the future. At the same time, work is progressing on a volume on best practices in Jewish community centers, being prepared in close cooperation with the JCC Association. Work is also under way on a volume on best practices in day schools, being developed in conjunction with the denominations and JESNA.

Following is a sample of some of the findings in the early childhood volume::

1. There is an explosion of programs in this area and a tremendous strain on the system. There is no area where the issue of personnel shortage is more acute than this. In fact, a significant number of teachers are non-Jewish.
2. The best practice sites identified are at least as good as any early childhood programs in North America. There is evidence that they are having an impact on the Jewish commitment of families.
3. There is better supervision in early childhood programs than in any other area of Jewish education. This is attributable to licensing requirements.
4. Training is a serious issue in early childhood programs. Many of the teachers have no Judaic training and many others have no education training.
5. Early childhood programs provide us with a "window of opportunity" with families. Typically there is significant interaction with families at this level and many of the good programs see provision of family education as their responsibility. The rate of continuation with day school education is high.

Barry concluded by noting that there is no plan to take any of the best practices and "drop" them into a community. However, they provide an excellent curriculum for thinking through the change process.

VI. Concluding Comments

The chair introduced Rabbi Isadore Twersky to conclude the meeting with a D'var Torah. He began by responding to a question posed by Charles Ratner earlier in the meeting about a source for the concept of leveraging. He noted that this might be traced to Hillel, the Elder, about whom it is said, "He loved all people and brought them close to Torah." This is interpreted as drawing people together at the fountain of Torah, where they have an opportunity to leverage each other's support.

He noted that in the discussion about the work of Lead Communities, reference had been made to bringing in the people on the perimeter. He paraphrased Franz Rosenzweig, who wrote that we need to "let the center radiate out to the periphery."

Rabbi Twersky noted that there has indeed been remarkable change in the sociological setting, atmosphere or attitude. He suggested that rather than aiming solely for "change," we should seek improvement, intensification, and implementation as key ideas guiding CIJE work.

In his D'Var Torah, he likened Jewish education to a seed that keeps growing, burgeoning, and budding. As a seed grows long after planting, Torah study continues to instruct and direct intellectually and experientially long after the conclusion of the formal instruction. He noted that the vision of CIJE is to help provide a Jewish education which will continue to resonate, to stimulate and sensitize youngsters and adults to contemplate the poetry and pageantry of our tradition. The vision, ultimately, is to continue to preserve our people as proud committed Jews.

VII. Adjournment

The chair thanked Rabbi Twersky and the meeting was adjourned at 4:00 P.M.

FIRST
3/1/2

suggested agenda for meeting with cije staff on educated Jew-goals project

- 1. the educated Jew project - from philosophy to goals*
- 2. the goals project - from the demand for accountability to the development of goals for institutions of Jewish education in lead communities*
 - the role of the training institutions (formulation, consultation, in-service training)*
 - the question of evaluation*
- 3. the larger strategy - focus on first iteration of goals with training institutions (in seminar/s with cije, mandel institute)*
 - develop further iterations in light of deliberations of training institutions on the educated Jew project*



will we be
next?

staffing

Eschen, Shulman
consultants

CISE

CISE
Staff - ISA, SOE

Institutions

denominations

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Date sent: 10/13 Time sent: No. of Pages (incl. cover): 10

To: Alan D. Hoffmann From: Mary Esther Block
Organization: Phone Number:

Fax Number: Fax Number:

Comments:

Please find enclosed two
reports from Roberta Goodman.

If there are any problems receiving
this transmission, please call:
216-391-1852

By April 1, 1994 | By January 1, 1994



- d. Personnel
- MEF professional survey results in diagnostic profile of all personnel personnel needs leading to a multi-year plan for personnel devel.
 - Summer 1994:: Summer Institute for targetted strategic personnel groups.
 - At least two Senior Educators or Jerusalem Fellows from each LC to be trained in 1994-5.
 - Projection of future pre-service needs and fleshed-out plan with training institutions.
 - Graduates of Senior Educators, JF and training institutions to fill key positions.

- e. Staff
- Ongoing monthly seminar in LC's with CUE core staff, local pros.

f. Lay Leadership

- Wall to wall commission in each LC in place
- Seminar on Goals has taken place in each community for the local Commission and maybe for the wider-educator/ Rabbi/ pro..community.
- Development of a community 'champion' and hooking him/her into CUE leadership ('Vaulting over' the local pros)
- July seminar in Israel for LC lay leadership

By July 31, 1994

By April 1, 1994

By January 1, 1994

4m

g. Pilot Projects

- One project at least underway in each LC and full completion of planning of additional projects for 1994-95
- CIJE consultants engaged for pilot projects
- Israel summer seminar for pilot projects
- System in place for networking between 3 LC's on pilot projects
- MEF in place on projects

h. MEF

- = Educators survey completed and analyzed with detailed policy recommendations.
- = Feedback loop designed and implemented in individual communities and feedback system created for CIJE core staff
- = mid-year report presented and summative year-end report processed through staff, consultants, MI and CIJE lay subcommittee

i. Goals Project

- Seminar with CIJE staff so that they understand the project.
- Seminar in each lead community on "Goals" for local Commission

Summary of operative decisions taken during the meeting of SF, ADH and SW on CIJE.

Sunday, September 26th 1993.

- 1) Role of MLM at GA. (ADH to call SHH)
- 2) SW to update ADH on state of Goals project (ongoing, Ed Jew, Scan Committee, Case study)
- 3) Suzanna, prepare time for discussion of case study, (to be taped)
- 4) For SF agenda with AH: Get Fried
- 5) For ADH: Prepare memo for SF re who deals with which Lay leaders.
A similar memo will subsequently be sent by SF to ADH.
- 6) For MI agenda:
 - a- Mandel Gescheften and North America
 - b- MAF in North America and the Mandel Gescheften
 - c- Cooperation with others who are serious about Building the Profession
 - d- Twersky's claim re השתלמויות
- 7) Prepare session during October CIJE staff seminar on Denominations
 - a- They are present in the Communities
 - b- Given that presence it is our responsibility to build them (e.g. Ed Jew)
 - c- Claims they made re Financial burden if they emphasize the LC (Bob)

Agenda for meeting with MLM on October 17th 1993

1) Arrangement re monies raised by SF for CUE to be deducted from total amount committed to be raised.

2) Re Lay leaders in the U.S.:

- Kekst: For CUE first, if there is additional funding then for Israel
- Nash: First for Israel, then for the U.S.
- Bader: 50-50
- Jesselson : U.S.
- Hirshhorn: SF to draft a letter of commitment; then during a meeting with ADH and Gamoran they can take SF's place.
- Bronfman: Develop approach for ADH:
 - SF suggestion is for one Lead Community, see what can be achieved re the Israel experience on two levels:
 - An approach that maximizes success through thorough preparation and follow up.
 - Proper marketing.
- = Lainer
- Bill Berman

3) Public Relations re Wexner

4) Re: Training Institutions: SF suggests that ADH doesn't get involved at present time.

DRAFT OUTLINE

CIJE ISRAEL STAFF SEMINAR OCT. 20TH - 25TH, 1993

AGENDA

I. Lead communities - 1993/94 operations

A. Benchmarks:

1. January 31st 1994
2. April 30th 1994
3. July 31st 1994

- i. Personnel
- ii. Strategic plan
- iii. Goals
- iv. Pilot projects
- v. Community mobilization (lay leaders, champions, grass roots))

B. GA seminar

II. CJE :: general

A. Denominations

B. Rabbis

C. From 3-23 ("Boston")

D. Educational Community

- Professional advisory group
- Conference and meetings

B. Tues., Nov. 9 - Milwaukee

GZD, ADM, BWH to spend day in Milwaukee, including evening with task force. Maybe ask DP to join.

C. Wed., Nov. 10 - Milwaukee

All day staff meeting to include GZD, AG, EG, ADM, BWH, VFL, DP

D. G.A., Nov. 16 - 19

1. Lead Community Seminar: 11/16 (optional lunch) 11/17 lunch

2. CIJE presentation(s)

E. National Calendar of Events and Our Presence

VII. Israel Agenda
[[Random order]]

ADM

A. From 3 to 23 [3:12. 4 JF]

B. Attainable lead community goals by April board meeting

C. The community of educators and CIJE

D. Establishment (rejuvenation) and use of professional advisory group

E. Lead community rabbis and broader groups of rabbis

F. Summer 1994 - for pros and lay people

G. Denominations

H. GA: Lead community seminar

I. Pilot projects

VIII. Review of upcoming developments

ADM

IX. Other issues

Team

X. Future telecons

VFL

Wed., Sept. 29, 10:30 am (EDT)

Wed., Oct. 6, 10:00 am "

Thurs., Oct. 14, 3:00 pm "

Can we set aside Wed. at 9:00 am (or 8:30) for future telecons?

XI. Review current assignments

VFL

Issues for Israel meeting in October:

Should I try to write a "vision" of Lead Communities ala The Future is History; what would/could the Lead Communities Council for Initiatives in Jewish Education look like if it worked.

The List of Ideas for Lead Communities

Ideas to deal with recruitment of educators

Ideas to deal with upgrading/in-service of educators

Ideas to deal with compensation of educators

Ideas for helping with strategic planning

Can we use the December 13, 1988 criteria for the prog. options
in working with the Lead Communities commissions

A LC project- how is "quality" judged in advance?

Project: A "Wexner"-type project for lay leaders: A Vision of Jewish Education for the future"- goals project both in Israel and US

What do we mean by systemic change: would raising up each institution individually, without hitting the whole system be enough.

How do you have systemic change when individual institutions are all independent? Differences between Jewish education and the Smith & O'Day view (no overarching control)

What is the connection of the Best Practices Project to the Lead Communities?

To: SF

From: SW

Date: September 19th 1993

Re: CIJE (Notes from meeting with Alan Hoffmann)

1) Call Dan Bader

2) Prepare Alan for the passing of the baton re each lay leader, e.g. Bronfman, Bader, Kekst, Hirshhorn.

3) Annette Anspach to visit Shoshana Shostrom Cardin

4) To be on agenda: The CIJE and its relationship to MLM and MAF

5) Invite Dave Samat for lunch at the Mandel Institute during next visit.
(Check dates)

6) Alan and SW to look for names from the Jerusalem Fellows and Senior educator as well as respected educators (e.g. Beverly) for the LC.
(Names suggested: Sara Lyn Neuberger, Carolyn Keller.

7) Get MLM slides

8) For the seminar: What is a reasonable product in each LC for the next 3, 6, 9, & 12 months.

9) Get the list of events scheduled for each Rabbinical group for the next 2 years. Decide who should speak at each of such meetings.

10) Coordinate timing of Tora Umesora gift.

11) MLM gift to CAJE. Alan to be in touch with CAJE (maybe with Mrs Melton)

12) SF for Alan: How to be in touch with MAF new director

13) Prepare proposal on PR for MLM donations.

14) SF to call Mike Inbar re How to use M. Lipset paper

115) SF to brief Alan on Gallup questionnaire

116) CJF: MLM gave them \$ 750,000.

How can Alan get inside.

117) SF write to Blumenthal

**118) In the light of what we know and in the light of the fact we rejected the lab,
and in the light of Mandel Institute activities and Israel, what can we offer to the
bright professionals, rabbis, and educators.**

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**Council for Initiatives
in
Jewish Education**

Date sent: Time sent

No. of Pages (incl. cover): 9

To: September 10, 1993

From:

Annette Hochstein, Seymour Fox,

TM TM

Mary Esther Block

Organization: Shmuel Wygoda

Phone Number:

Phone Number:

Fax Number:

Fax Number:

972 2 619 951
Comments:

216-391-5480

Seymour,

ADH requested that I fax the attached to you.

MEB

If there are any problems receiving
this transmission, please call:
216-391-1852

COMMISSION ON JEWISH IDENTITY AND CONTINUITY

A CONTINENTAL COMMISSION ON JEWISH IDENTITY AND CONTINUITY: FRAMING STRATEGIES

Draft: 8/27/93

The Task

We begin with the findings of the National Jewish Population Study, which confirmed what we all knew or suspected: our community's continuity is in jeopardy because of a weakening of Jewish identity in North American society.

Our task is to begin to reverse this trend — not just to survive, but to create vital Jewish lives and Jewish communities for ourselves, the next generation and the generations to come. We seek to make Judaism more central in the lives of more Jews, to nurture the desire and the commitment to make Jewish choices and to live by Jewish values, to foster vibrant Jewish homes and families. This goal must remain paramount in our thinking and in our action.

Although Jewish institutions alone cannot effect the transformation we seek, their energies and efforts will be indispensable for its achievement. Our communal organizations represent our best means for reaching individual Jews with the message of the joys and responsibilities of Jewish living. For some of these institutions — our congregations and their associated religious and educational institutions being the most notable examples — promoting serious, committed Jewish living has long constituted the very core of their mission. They embody the traditional foundations of Jewish life — *Torah*, *avodah*, and *gemilut hasadim*. It goes without saying that these institutions and their national movements are central, in their role and expertise, to any effort to strengthen Jewish identity.

For others, such as Federations, building Jewish identity represents a concern that has grown up alongside other traditional foci — e.g., meeting human needs here and overseas as an expression of their commitment to *tzedakah* and *tikkun olam* — but has now begun to move toward the top of their agenda. Over the past few decades, many Federations have increased their support for Jewish education. During this same period, their annual campaigns have increasingly taken on the character of efforts not just to raise funds, but also to build Jewish community and to raise Jewish

consciousness. Federations support a number of national agencies — including JESNA, the National Foundation for Jewish Culture, Hillel and other campus agencies — who share with the religious movements a primary focus on enhancing Jewish identity, knowledge, and commitment. The Jewish Community Centers Association and many JCCs have also made Jewish education a high priority.

Despite this growing confluence in goals, the two great institutional complexes built around the Synagogue and the Federation respectively have not generally worked as full partners in the effort to promote Jewish continuity. Today, however, there is growing recognition on all sides that just such a partnership, based on respect for the integrity of all institutions, must be effected. The palpable threats to Jewish continuity demand that Federations, Synagogues, and the array of other institutions vitally concerned with the Jewish future — educational bodies, membership organizations, community relations agencies, Israeli and Zionist organizations — work more closely together.

Combining our institutional expertise on how to strengthen Jewish identity will not be a sufficient response to the challenges we face. Despite our expertise, neither singly nor together have we been able to provide definitive answers to the fundamental question that defines our historic situation: How can we ensure that Jews will continue to choose to be Jewish and to create and participate actively in a vibrant, diverse Jewish community within contemporary North American society?

In part, answering this question will require that we provide more support to existing institutions and programs which have demonstrated an ability to strengthen identity and community. It will also require creating additional opportunities for Jews of our era to find deep personal meaning in their Jewishness and to live out Jewish values and commitments. To do both, we will need to reexamine our priorities in allocating resources and increase our investment in identity- and community-building.

Much of what must be done to ensure our future can only be implemented locally; and, indeed, local communities, synagogues, and organizations across the continent have begun major initiatives in this arena. But there are other components of the task — e.g., research, recruitment and training of professional leadership, validation of new priorities — that will require collective continental action. Our major continental movements and agencies have begun to respond with important initiatives of their own, both individually and cooperatively through a variety of endeavors, such as the Commission on Jewish Education in North America. But much work remains.

The process of mobilization for Jewish continuity will require, above all, a willingness to implement dramatic and creative changes both within organizations and in their relationships to each other.

Federations locally and CJF continentally have a special responsibility and experience

to bring to bear in building the community-wide coalitions that must take shape. It is for this reason that CJF has taken the initiative to form a Commission on Jewish Identity and Continuity that would represent and energize the unprecedented partnership we require.

The Challenge

Successfully carrying forward the work of the Commission, and even more the process of change it seeks to inspire and assist, will not be easy. Some of what the Commission aims to achieve draws on familiar concerns and skills. The Synagogues' long experience in inspiring, educating, and creating communities of Jews of all ages will be called upon. So too will Federations' historic talents in communal and program planning and in financial resource development.

But other elements of the Commission's agenda will challenge our past experience and current capabilities. To give two examples:

- 1) Finding the appropriate ways for Federations and congregations (locally) and the federated system and denominational movements (nationally) to work more closely together is more than a matter of simple desire or a decision to do so. For both, it will require creating new kinds of relationships with organizations and leadership having very different histories, cultures, and modes of operation. To truly reflect change, these must be relationships of openness and equality, in which the autonomy and unique characteristics of each institutional framework are respected, even as the level of cooperation and mutual support grows.
- 2) Our goal, in part, is to help the next generation of Jews enjoy richer, deeper Jewish lives. Yet, many within this generation do not perceive a weakened attachment to Jewish life as personally problematic. For such Jews, our task is as much to create the desire for fuller Jewish engagement and self-expression as it is to satisfy that need.

There will be other challenges:

- 1) To balance the pressures for short-term accomplishment with recognition of the need for a long-term, comprehensive approach.
- 2) To put forward a manageable agenda, without becoming superficial.
- 3) To make the best use of existing expertise, while allowing room for new knowledge and new paradigms for action to emerge.

Conceptual/Strategic Principles

In light of the above, we propose the following framework of strategic principles for the work of the Commission:

- 1) Creating the Commission is an act of coalition building. The Commission must provide an environment in which participants can work together in new ways and develop new understandings of their own roles and missions. The Commission's major task is not to produce a program or a report, but to help shape a new reality in Jewish organizational life.
- 2) Commission members, leaders in their respective fields of activity, will bring much knowledge and wisdom to its deliberations. But they must also be prepared to learn and to be affected by serving on the Commission.
- 3) The Commission's work will incorporate several different tasks and processes. These will require coordination, but also sufficient space and integrity to accomplish what we need from each. For example, gathering and disseminating expertise is quite different from seeking to facilitate organizational change. The Commission will need to approach these two tasks with awareness of this difference.
- 4) The Commission will need to hear from and involve a wide range of constituencies and interests, including individuals from outside the organizational networks represented on it. It will need to ensure that all relevant information and expertise, including that possessed by professionals in the "trenches" of this effort, are available to it.

The Work of the Commission

To accomplish its mission, the Commission will:

- Act as a catalyst for change by bringing together in constructive dialogue institutional leadership, experts, and individuals drawn from many segments of American Jewish life.
- Develop guidelines, models and principles which can facilitate the transformation of institutional cultures and put in motion communal initiatives to enhance Jewish life into the 21st century.
- Gather, analyze and disseminate information on trends, developments and initiatives in Jewish institutional and communal life impacting upon Jewish identity and continuity.

- Explore a variety of conceptual frameworks to illuminate and come to grips with the complex issues involved in promoting Jewish identity and continuity.
- Pool resources, expertise and the influence of participating institutions to address issues that are continental in nature and best dealt with collectively.

SUMMARY

As we gather to raise our community's consciousness that Jewish identity and continuity are the priority issues of our time, we will be helping the North American Jewish community reach toward a vision for and of itself that transcends any existing reality.

The Commission's most important role will be to create a new coalition of organizational forces to sustain, support, and extend this process by itself representing a new reality in Jewish life. The process of the Commission's work — collaborative, deliberative, forward-looking, guided by diverse ideologies, yet sharing a fundamental commitment to *am Yisrael*, *Torat Yisrael*, and *emunat Yisrael* — will be a microcosm of the community we seek to build.

We anticipate that all parties involved in this process will change, not as a result of any collective decision or plan, but as a result of the new thinking which can result from new dialogues and relationships. Indeed, an openness to change is, perhaps, the most important thing which all can bring to the Commission and will be the most important measure of our individual and collective credibility in this historic undertaking.

The work of this Commission is only one part of the effort our communities and institutions must make if we are to transform the realities of North American Jewish life over the next decade. But by helping to change the focus of our energies and the ways in which we work together, the Commission's contribution can be a central one. We will know that the Commission has fulfilled its mission, not with a final report, but when the new organizational realities and new paradigms for moving into the future that have emerged within the Commission become part of the normal operations of our community. With this clear, but open-ended goal, we are ready to begin our work.

CS/NF/JSW
Jid7

COMMISSION ON JEWISH IDENTITY AND CONTINUITY

Draft - September 2, 1993

THE WORK OF THE COMMISSION

Introduction:

The work of the Commission on Jewish Identity and Continuity will involve three basic components:

- A. identifying key issues and strategic directions for continuity initiatives (an "agenda for Jewish continuity");**
- B. identifying and seeking to expand, disseminate, and replicate successful program models developed by organizations and local communities; and**
- C. providing a setting within which institutions and systems operating at the continental level can develop new strategies and initiatives that require collaborative, continental action.**

These components will be interlinked and mutually reinforcing. Each of the three components will be pursued as a Commission project in accordance with a specific work plan identifying appropriate objectives, timetables, and methods of work. The projects are designed to run concurrently, with each being launched as quickly as staff and logistics allow.

Together with these specific projects, the Commission will, throughout the course of its work, seek to strengthen communication and relationships between and among the large number of institutions and communities who are engaged in efforts to promote Jewish continuity.

Project 1: An Action Agenda for Jewish Continuity

I. Objective:

To stimulate the development, expansion, improvement, and effective implementation of initiatives to strengthen Jewish identity and community by:

- a) identifying critical issues involved in ensuring Jewish continuity;**
- b) elaborating effective strategies for addressing these issues; and**
- c) engaging the Jewish media to promote widespread attention to these issues and support for the strategies to enhance Jewish identity and continuity.**

III. Method of work:

- A. Working groups will deliberate on key issues and approve draft sections of the "agenda" for final discussion and approval by the Commission as a whole. The drafts will be prepared by staff, outside consultants, or Commission members as appropriate. The Steering Committee will coordinate the process.
- B. With the assistance of local communities, the Commission will hold open forums or focus groups at several sites around the continent to solicit input from a broad spectrum of Jews.
- C. At an appropriate time, the Commission will also seek input from knowledgeable Israelis.
- D. Organizations and movements participating on the Commission will be encouraged to engage in parallel activities within their own frameworks and to submit background materials, position papers, etc., on the issues being addressed by the Commission. (Some are already doing this.)
- E. Through its staff, consultants, and interested members, the Commission will monitor Jewish publications and prepare summaries of relevant papers, articles, and books for circulation to its members.
- F. In order to promote its "agenda for Jewish continuity," the Commission will engage with the Jewish media and enlist their involvement in promoting thoughtful attention to continuity issues and broad dissemination of effective strategies.

Project 2: Model Programs for Jewish Continuity

I. Objective:

To identify successful models of organizational and communal action for Jewish continuity in three major areas:

1. Program development;
 2. Intra-communal relations and organizational change, and
 3. Resource development;
- and to promote their expansion, dissemination, and replication.

Project 3: Collaborative Initiatives for Jewish Continuity

I. Objectives:

To plan and implement several major inter-organizational initiatives at the continental level to promote Jewish identity and continuity.

II. Deliverable:

Between three and five initiatives carried out jointly by several organizations represented on the Commission. Each initiative should a) have the potential to make a substantial impact in at least one area deemed central to promoting Jewish continuity; b) require inter-organizational collaboration; and c) require action and support at the continental (as well as local) level. Participation by organizations in any of the projects will be voluntary.

Examples of possible projects are:

- work with the national media on the images of Jews and Jewish life they present.
- an initiative to reach out to Jewish students graduating from college and to provide them with connections to the Jewish community as they move into the next stage of their lives.
- the development of partnerships between synagogues and service agencies that are part of the local federated system to deliver a wide range of primary services directly through synagogues.
- creation of a continental scholarship fund to make it possible for more Jewish youth to participate in educational programs in Israel and Jewish summer camping.
- creation of a portable national pension and benefits plan for Jewish teachers.

These projects will be designed both to have an impact in their own right, and to provide models and working experience for additional collaborative ventures.

III. Method of work:

A working group of the Commission will develop a list of potential projects, based on consultations with the organizations represented on the Commission, a widely-circulated Request For Proposals (RFP), and the information gathered by the Commission.

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**Council for Initiatives
in
Jewish Education**

Date sent: August 23, 1993 Time sent: No. of Pages (incl. cover):
To: Caroline Bisan From: Mary Esther Block
Organization:

Phone Number: Phone Number:

Fax Number: Fax Number:
0119722 619 951 216-391-5430

Comments:
Caroline:

Here is a copy of the latest schedule for ADM. I thought you might want a copy. If there are any major changes, I will let you know.

MEB

If there are any problems receiving
this transmission, please call:
216-391-1852

August 23., 1993

Alan Hoffmann's Scheduled Visit to States

August 18 Mayflower Hotel
15 Central Park West
New York, NY 10023
Phone: 212-265-0060
FAX: 212-265-5098

August 19 New York Staff Meeting 9:45 AM
American Friends of the Hebrew University
11 East 69th Street
New York, NY 10021
Phone: 212-472-9800
FAX: 212-744-2324

August 20 New York Staff Meeting 8:45 AM
American Friends of the Hebrew University

August 21 Saturday

August 22 Sunday Arriving Baltimore by train
Doubletree Inn at the Colonnade
4 West University Parkway
Baltimore, MD 21218
Phone: 410-235-5400
FAX: 410-235-5572

August 23 Baltimore CIJE/Lead Communities Seminar Staff Group 10:30 AM
Full Group 12:00 Noon
THE ASSOCIATED
101 West Mount Royal Ave.
Baltimore, MD 21201
Phone: 410-727-4828
FAX: 410-752-1177
Dinner w/Lead Community - Atlanta 6:30 PM
Lauren Azoulay
Steve Gelfand
Janice Alper

August 24 Breakfast w/Lead Community - Milwaukee 7:30 AM
Doubletree Inn
Ruth Cohen
Jane Gellman
Louise Stein

Baltimore CIJE/Lead Communities Seminar 9:00 AM
THE ASSOCIATED
Lunch w/ Lead Community - Baltimore 12:15 PM
Chaim Botwinick
Genine Fidler
Nancy Kutler
Marshall Levin
Ilene Vogelstein

Train to New York?

Mayflower Hotel

August 25 Meeting with MLM 9 AM

Planning Meeting 1:00 PM
JCC Association
15 East 26th Street
New York, NY 10010
Phone: 212-532-4949
FAX: 212-481-4174

Dinner w/MLM, Seymour Fox 6:30 PM
The Mayflower

August 26 Executive Committee Board Meeting 9:30 AM

UJA/Federation
130 East 59th Street
New York, NY 10022
Phone: 212-980-1000
FAX: 212-755-9183
Lunch 12:00 noon
Board Meeting 1:00 PM
Debrief 4:00 PM

Dinner w/Seymour Fox, Annette Hochstein
location to be determined

August 27 Meeting w/MLM 9:00 AM

Staff Meeting 1:00 PM
Location to be determined

August 28 Saturday

August 29 Sunday Arriving Cleveland....time? for Holiday Inn van pickup

Holiday Inn Lakeside
111 Lakeside Ave.
Cleveland, OH 44114
Phone: 216-241-5100
FAX: 216-241-1831

August 30 CIJE
4500 Euclid Ave.
Cleveland, OH 44103
Meetings w/
Ginny Levi 8:00 AM
Art Naparstek 9:00 AM
Henry L. Zucker 10:30 AM
Chuck Ratner 12:30 Lunch - Ritz Carlton Hotel

August 31 Jewish Community Federation
1750 Euclid Ave.
Cleveland, OH 44115
Phone: 216-566-9200
FAX: 216-566-9084
Meetings w/
Mark Gurvis 9:00 AM
Steve Hoffman 10:00 AM
Barry Reiss and Stu Neidus 11:00 AM
Lunch w/Ginny Levi 12:00 Noon

Delta Flight #1163 to Atlanta Leaving at 4:05 PM or
Delta Flight #1517 to Atlanta Leaving at 7:55 PM

Wyndham Midtown Hotel
10th & Peachtree Street
Atlanta, GA
Phone: 404-873-4800
FAX: 404-870-1530

Confirmation number WA215325 ((guaranteed late arrival))

September 1 Atlanta Jewish Federation
1753 Peachtree Road, N.E.
Atlanta, GA 30309
Phone: 404-873-1661
FAX: 404-874-7043
Meetings w/
Steve Gelfand 9:30 AM
David Sarnat 10:30 AM
Lauren Azoulay 12:00 Noon
Gerald Cohen 2:00 PM
Janice Alper 3:00 PM
Dr. William Schatten 4:30 PM

Evening meeting w/Atlanta Commission

Wyndham Midtown Hotel

September 2 Delta Flight #1024 to Milwaukee Leaving Atlanta 8:18 AM
Arriving 9:10 AM (Picked up at airport by Ruth Cohen)

Milwaukee Jewish Federation
1360 North Prospect Ave.
Milwaukee, WI 53202
Phone: 414-271-8338
FAX: 414-271-7081
Meetings w/
Rick Meyer 9:30 AM
Howard Neistein 10:30 AM
Ruth Cohen 11:30 Lunch
Jane Gellman 1:30 PM
Daniel Bader 3:00 PM

Pfister Hotel
424 East Wisconsin Ave.
Milwaukee, WI 53202
Phone: 414-273-8222
FAX: 414-273-8222 ((same))
Confirmation number: 1985603

September 3 American Flight #4151 to New York 5:20 AM
Arriving 9:59 AM

Meetings w/
Jonathan Woocher 11:30 AM ((JESNA, 730 Broadway, NY))

Robert Hirt and Alvin Schiff 1:00 PM ((Yeshiva University, 500 West
185th Street, NY))

Aryeh Davidson and Bob Abramson 3:00 PM ((Jewish Theological
Seminary, 3080 Broadway, NY))

September 4 Saturday

September 5 Sunday

September 6 Monday/Labor Day - Delta Flight #1824 8:30 AM to Boston -
Delta Flight #4959 8:30 PM to Baltimore

Doubletree Inn on the Colatnade
4 West University Parkway
Baltimore, MD 21218
Phone: 410-235-5400
Fax: 410-235-5572

September 7 THE ASSOCIATED
Lunch Meeting w/
Dr. Chaim Botwinick 12:00 Noon
Nancy Kutler
Marshall Levin
joined by Genine Fidler 3:00 PM
Ilene Vogelstein

September 8 Delta Flight #1279 from Baltimore to Indianapolis 10:35 AM
Arriving 12:02 PM
Airport Lunch Meeting 12:10 PM
w/ Barry Holtz, Art Naparstek
Lilly Foundation Meeting 1:30 PM
Hyatt Regency Hotel
1 S. Capitol Ave.
Indianapolis, IN 46204
317-632-1234
Confirmation number 88357467-1

September 9 Meeting w/MMM, Steve Hoffman 8:30 PM
Hyatt Regency Hotel

September 10 Columbus/Florence Melton ?

September 11 Saturday

September 12 Sunday Leaving States

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**Council for Initiatives
in
Jewish Education**

Date sent:

Time sent:

No. of Pages (incl. cover):

August 20, 1993

To: Annette Hochstein, Seymour Fox,
Shmuel Wygoda

From: Mary Esther Block

Organization:

Phone Number:

Phone Number:

Fax Number:

Fax Number:

972 2 619 951

216-391-5430

Comments:

Oriana,,

Here is permanent information for Gail Z. Dorph in New York.

Gail Z. Dorph
588 West End Ave..
Apt. A/B
New York, NY 10024

Phone: 212-769-0725

No FAX number as of yet. I will forward number to you if and when she has one.

MEB

If there are any problems receiving
this transmission, please call:
216-391-1852

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No. of Pages (incl. cover):

From: Ginny Levi

Phone Number: (216) 391-1852

Fax Number: (216) 391-5430

Dear Shmuel,
I have the agendas for ~~Sept~~^{Oct} 9-20 and
23-24. Thanks. ~~Also~~ I expect in
thinking you will have the background
materials for those meetings? Please
let me know.

2nd 100 = spoken with 5 F + 4 H. Ticks are in fine form.

Please give the attached to Caroline,
from Mary Esther. »

"Thank. See you soon."

$$\Delta V_{yO}$$

Vr> - (J • pA-A

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**If there are any problems receiving
this transmission, please call:
216-391-1852**

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Council for Initiatives
in
Jewish Education

Date sent: Time sent: No. of Pages (incl. cover):
To: August 13, 1993 From:
 Caroline Biran Mary Esther Block
Organization;

Phone Number: Phone Number:

Fax Number: Fax Number:
 ^ 972 2 619 951 216-391-5430
Comments:

Dear Caroline,

Please find attached copy of latest schedule for ADH. Hope your move went well.

MEB

To CB, from CJE
Re - ADH Scedual

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this transmission, please call:
216-391-1852

August 13, 1993

Alan Hoffmann's Scheduled Visit to States

August 18 Mayflower Hotel
August 19 New York Staff Meeting 10:00 AM
20 " 8:45 " " " 8:45 AM
August 21 Saturday
August 22 Sunday Arriving Baltimore
August 23 Breakfast meeting with Shulamith Elster 7:00 AM
August 23 Baltimore CIJE/Lead Communities Seminar 10:30 AM
24 " " " "
25 New York * Planning Meeting 1:00 PM
26 " " - Board Meeting 10:00 AM
27 " " - Staff Meeting 9:00 AM.....?
28 Saturday
August 29 Sunday Arriving Cleveland
30 Cleveland Meetings w/
Ginny Levi 8:00 AM
Art Naparstek 9:00 AM
Henry L. Zucker 10:30 AM
Chuck Ratner 12:30 Lunch
August 31 Cleveland Meetings w/
Barry Reis 9:00 AM
Steve Hoffman 10:00 AM
Mark Gurvis 11:00 AM
Ginny Levi 12:00 Lunch
31 Late Flight to Atlanta
31 Wyndham Midtown Hotel
10th & Peachtree Street
Atlanta, GA
404-873-4800
Confirmation number WA215325 ((guaranteed late arrival))
September 1 Atlanta Meetings w/
Steve Gelfand 9:30 AM
David Sarnat 10:30 AM
Lauren Azoulai 12:00 Noon
Gerald Cohen 2:00 PM
Janice Alper 3:00 PM
Dr. William Schatten 4:30 PM
Wyndham Midtown Hotel
September 2 Early flight to Milwaukee Meetings w/
Rick Meyer 9:30 AM
Howard Neistein 10:30 AM
Ruth Cohen 11:30 Lunch
Jane Gellman 1:30 PM
Daniel Bader 3:00 PM
September 3 Early flight to New York- Meetings w/
Bob Abramson
Aryeh Davidson
Jonathan Woocher
Robert Hirt and Alvin Schiff
September 4 Saturday
September 5 Sunday

September 6 Monday/Labor Day - Flight to Baltimore
 September 7 Baltimore Meetings w/
 Dr. Chaim Botwinick 8:30 AM
 Nancy Kutler 10:00 AM
 Marshall Levin 11:30 AM
 Genina Fidler 1:00 PM
 Ilene Vogelstein 2:30 PM
 September 8 Early flight to Indianapolis
 Airport Lunch Meeting 12:30 PM
 w/ Barry Holtz,, Art Naparstek
 Lilly Foundation Meeting 2:30 PM
 September 8 Hyatt Regency Hotel
 1 S. Capitol Ave.
 Indianapolis, IN 46204
 317-632-1234
 Confirmation number 88357467-1
 September 9 Meeting with MLM 8:30 PM
 Hyatt Regency Hotel
 September 10 Columbus/Florence Melton ?
 September 11 ~~Saturday~~
 September 12 ~~Sunday Leaving States~~

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Council for Initiatives
in
Jewish Education

Date sent: 8/11/93 Time sent

No. of Pages (incl. cover):

To: *Diana*

From:

Organization:

Mary Esther Block

Phone Number:

Phone Number:

Fax Number:

Fax Number:

Comments:

The following information pertains to Gail Dorph and where she can be located during August:

LA phone number good until August 15 1-310-477-1424

New York temp. number good until she has a permanent number 1-212-410-7081 tel. P-9 d Until she has a permanent number

If we need to fax or send information before August 15

send to her sister: Mrs. Fredi Spiegel
201 S. LaPeer Drive
Beverly Hills, CA 90211

FAX: -310-276-6717

Permanent address in New York

588 West End Ave.
Apt. A/B
New York, NY 10025

No permanent phone number as yet.

W. F. F. T. M. C. F. J. 6 No of vxa

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this transmission, please call:
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Re- Gail W
info.

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Council for Initiatives
in
Jewish Education

Date sent: August 11, 1993
To: Caroline Biran
Organization:
Phone Number:
Fax Number:
Comments: 972 2 619 951 2 619 951

No. of Pages (incl. cover):
From: Mary Esther Block
Phone Number:
Fax Number: 216-391-5430

Dear Caroline,

Please find attached copy of latest schedule along with flight information. If you would like me to reserve flights, please let me know as the seats fill up fast.

Barry Holtz will not be in New York on September 3.

I spoke with Gail Berph about accompanying ADH to the three Lead Communities. She thought it was a good idea and she would be glad to go. I told her nothing was definite yet. Let me know what is decided.

MEB

Te - to Carol
Se - ADH SereJ dXL

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this transmission, please call:
216-391-1852

August 11, 1993

Alan Hoffmann's Scheduled Visit to States

August 18 Mayflower Hotel
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September 1 Atlanta Meetings
September 2 Early flight to Milwaukee
Milwaukee Meetings
September 3 Early flight to New York- Meetings w/
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Jonathan Woocher
Robert Hirt (and Alvin Schiff?)
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September 5 Sunday
September 6 Monday/Labor Day *Flight to Baltimore
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Dr. Chaim Botwinick 8:30 AM
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Marshall Levin 11:30 AM
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Ilene Vogelstein 2:30 PM
September 8 Early flight to Indianapolis
Airport Lunch Meeting 12:30 PM
w/ Barry Holtz, Art Naparstek
Lilly Foundation Meeting 2:30 PM
September 9 Meeting with MLM 8:30 PM Indianapolis
September 10 Columbus/Florence Melton ?
September 11 Saturday
September 12 Sunday Leaving States

Flight Choices for ADH

Tuesday, August 31 -- Delta

Leaving Cleveland Arriving Atlanta

4:05 PM 5:47 PM

7:55 PM 9:33 PM

Thursday, September 2

Leaving Atlanta Arriving Milwaukee

8:18 AM 9:10 AM

Leaving Milwaukee Arriving New York

5:25 PM change in Cincinnatti 10:50 PM

OR

Friday, September 3

No Non-stop Flights

Leaving Milwaukee Arriving New York

7:17 AM change in Cincinnatti 12:20

There is a Midwest Express flight leaving 7:50 AM 1010555 AM
Delta will not honor this.

Monday, September 6

Leaving New York (Kennedy) Arriving Baltimore

12:55 PM 2:07 PM

3:20 PM 4:40 PM

4:50 PM 6:05 PM

Wednesday, September 8

Leaving Baltimore Arriving Indianapolis

No Non-stop Flights

6:40 AM change in Cincinnatti 9:00 AM

10:35 AM " " 12:02 AM " AM

Caroline, We propose the following:

August 23 and 24 Lead Community meals with ADH

August 23 Dinner - with Atlanta (Lauren Azoulay, Steve Gelfand) at THE ASSOCIATED

August 24 Breakfast - With Milwaukee (Chaim Botwinick, Genine Fider, Nancy Kutler, Marshall Levin, Ilene Vogelstein) at the Doubletree Inn

August 24 Lunch - with Baltimore (Ruth Cohen, Jane Gellman, Louise Stein) at THE ASSOCIATED

Let me know if This is OK.

MZB

Peabody College

VANDERBILT UNIVERSITY



NASHVILLE, TENNESSEE 37203

TELEPHONE (615) 472-7111

Director/Chief of Educational Leadership - Box 14 • Direct phone 322-5000

Tax Amatic and ~~201001~~

From: Ellen

Re: Educator Survey: Principal Questionnaire

Date: July 27, 1993

I have just received the following Tax from Nancy Hendrix ((the data company entering and analyzing the data for the teacher survey)) regarding the data for the Principal's Educational directors/leaders)) version of the educator survey. As you may recall, Milwaukee is in the process of collecting surveys from educational leaders now.

I have asked Nancy to give me an estimate for data entry only. We are hopeful that once we hire a new field researcher to replace Claire, s/he will be able to analyze the data.

How do you suggest we proceed? Principal questionnaires are still being sent back to Ruth.

Post-it • brand fax transmittal memo 76711 • of pages 2

To: <i>Honnette Hochstein</i>	From: <i>Ellen Hendrix</i>
Co: <i>Peabody College</i>	Co: <i>Vanderbilt U.</i>
Dept:	Phone: <i>615-322-5037</i>
Fax: <i>615-322-5037</i>	Fax: <i>615-343-7094</i>

6152428847' GEOGRAPHIC DATA CON

005 P01 JUL 21 '93 11:18 P81 ^ " . S

To: EElam Gbdtthg

From: Nancy Hendrix

Subject: Estimate for Principal Questionnaire Entry

I have estimated what it would cost for us to do the entry, verification, and coding of open-ended and fixed response questions for the principal study. If we spread the costs of data entry as well as coding and verification among the three cities in the same way that we did before, Milwaukee and Atlanta would each pay \$220, and Baltimore would pay \$1100. If Milwaukee were the only city, they would pay \$1320 since the cost of open-ended questions, training, etc. would be borne by them alone. If for some reason, each of the three cities has about the same number of questionnaires, we can simply divide \$1540, the total for processing between 60 and 200 questionnaires, by three.

Much of the cost, again, is based on the length of the questionnaire which requires not only more time to enter each response but, more importantly, more initial time in training entry personnel on the fine points of entry especially in regard to the large number of "other" answers. Unfortunately even though the teacher's and principal's questionnaires will be alike, the answers to "others, please specify" may not be. In any case, time will be expended determining whether or not to code the dozens of "other" answers exactly as in the teacher's questionnaire or differently.

If for some reason, each of the three cities has about the same number of questionnaires, we can simply divide \$1540, the total for 150 questionnaires by three. We are set up for handling large numbers of questionnaires; there really is an economy of scale, so that the per questionnaire cost turns out to be much higher for every part of the process when we are dealing with small numbers.

We have finished the data entry for the educator's questionnaire except for an additional packet which arrived Monday. Thus we can begin the analysis since we have been assured that no more questionnaires will be sent. Let me hear from you if you have additional information on crosstabs and correlation preferences. I have your fax which I am using as a guide. I will call with any additional questions as we proceed. I am looking forward to the analysis phase.

COMMISSION ON JEWISH EDUCATION IN NORTH AMERICA
Meeting of August 1, 1988

The Interview with Commission Members
A Selection

The Commission on Jewish Education in North America is composed of 44 individuals representing a wide range of perspectives. Prior to this meeting the Commission staff interviewed almost all of the commissioners to help build the agenda of the first Commission meeting. What follows is a selection of the points of view expressed by the commissioners. . . of the statements were expressed by many or all of the commissioners, while others represent the perspective of a few. Some of the views expressed complement each other while others may be contradictory.

The major issues raised appear to cluster around six topics:

1. The people who educate
2. The clients of education
3. The settings of education
4. The methods of education
5. The economics of education
6. The community: leadership and structures

I. The People Who Educate

- A. The shortage of appropriate, qualified people to educate children, youth and adults is the most important issue for our Commission to address.
- B. The personnel of Jewish education, in formal and informal settings, their recruitment, their training, their retention, is the key factor affecting the quality of Jewish education. It is also a crucial factor in determining the number of participants in Jewish education.
- C. There is a need to build the profession of Jewish education and to develop a greater sense of professionalism in the field.
- D. Increased salaries and fringe benefits are necessary. They will raise the status of education and facilitate the recruitment of qualified people.
- E. Salary is important, but the status, the empowerment, the personal growth and advancement of the educator are even more important.
- F. It is necessary to undertake a concerted, well-planned effort to recruit personnel to the field.

G. The education of educators is a high priority.. It evokes some interesting differences of opinion:

1. Viewpoint I - We should invest heavily in training institutions.. The building of new and different programs should also be considered.
2. Viewpoint II - The most effective kind of training takes place on-the-job, through apprenticeships, mentorships or sabbaticals of various forms..
3. Viewpoint III - The most practical approach is to build centers for thinking and research.. Educational reform is most effective when it moves from the top down. Martin Buber's contribution to adult Jewish education in Germany or John Dewey's contribution to education in America, demonstrate that profound ideas are the way to attract the people we need, are the fastest and most effective way to change the image of the field of Jewish education and to create a profession.

II.. The Clients of Education

Many comments and suggestions concern the participants - young and old who can or do partake of Jewish education:

Who are they?

What do they need?

What do they want?

A. Three points of view were expressed as to whom we should try to attract and serve:

1. We must change our approach to our clients and actively reach out to the less affiliated. We must market our product more effectively and offer the kind of variety that will attract those that are not currently involved.
2. We must improve the quality of programs; outreach will resolve itself when the quality of Jewish education is improved. Good programs will attract larger numbers of students to Jewish education.
3. The most sound investment is in the strengthening and improving of education for the committed. This point of view claims that they are our most important population.

B. Our knowledge base about the clients of education is minimal, at best, and our intuitions may even be misleading. We simply do not seem to know enough about the Jews of North America to make informed decisions.

III. The Settings of Education

Issues were raised about the many forms of formal and informal education: Which forms justify the greatest investment? What is most in need of qualitative improvement? What has the greatest potential?

- A. Informal education offers great opportunities: the community center, the arts, Israel experience programs, summer camping, youth movements and youth groups are means for reaching many more clients than are currently involved and for impacting on the lives of those that are already participating.
- B. Ways should be found of combining forces between formal and informal settings to create new forms of education.
- C. A massive investment of energy, thought and resources should be made in day-school education. The day school offers the most nearly complete Jewish educational environment; the schools can and will grow if they are improved and properly marketed, and if tuition is within the reach of more parents.

On the other hand, the impact of day schools for students coming from homes that do not support the values and goals of these institutions is not clear.

The number of all day high schools should be increased. Enrollment drops dramatically, precisely at the time when the values of the young person are particularly open to influence.

- D. Differences of opinion were expressed about the supplementary school:
 - 1. Though the supplementary school serves the vast majority of our young people participating in formal Jewish education, it is not a successful educational enterprise and may not be salvageable.
 - 2. The supplementary school is where the clients are. Therefore, we must engage in serious efforts to improve it.
- E. The ideas, views, suggestions expressed span the age continuum from early childhood through adult education.
 - 1. Early Childhood Education and Day Care

This area has great potential. The proponents of formal and informal education join forces to argue that the large number of children and the enormous potential for educational impact converge to make this area worthy of serious attention. However, the personnel for early childhood education, their training and salaries represent a very serious challenge.

2. The Israel Experience

Educational experiences in Israel have a significant impact on young people. Some commissioners believe this to be true for loosely structured programs, summer touring, camping. Others believe structured programs at universities, yeshivot or for day schools are more effective. The issue of ensuring program quality and the question of subsidies were raised.

3. The College Campus and the University

Approximately eighty-five percent of all Jewish young people attend colleges and universities. Educational intervention on the campus is very important because this may be our last opportunity to educate. The academic climate that values universalism over particularism forces difficult dilemmas upon our young people.

4. Adult Education - Family Education

The family environment and the education of adults is of considerable importance, particularly if we want to succeed in the education of children. Though there are encouraging developments in this area, this form of education is still underdeveloped.

IV. The Methods of Education

Energy should be devoted to the various methods used in different forms of education. These include methods for the teaching of Hebrew, history and contemporary Jewish life. A serious effort should be made at curriculum reform that would emphasize the teaching of values, the attachment to the Jewish people and to Israel. We should invest systematically in the creative use of the media and computers for Jewish education.

V. The Economics of Education

- A: We have very sketchy data about present expenditures for Jewish education by the North American Jewish community.
- B: This area is important because the reform of education will cost money, whether it be for teacher salaries, the development of training institutions, or on-the-job training.
- C: The high cost of tuition, particularly for day schools, for the Israel experience, and for camping is a stumbling block to increased participation.

- D. Improved educational facilities are needed. For example, we need good, up-to-date laboratories in the sciences. We need facilities for computer education and for physical education.
- E. There is a need for venture capital to encourage new and creative ideas.

VI. The Community: Leadership and Structures

- A. The recruitment of a cadre of community leaders to the cause of Jewish education is viewed as a high priority. The community leaders are one of the key forces for change. They will have to be informed as to the realities and problems of Jewish education and assume the key positions where policy is determined.
- B. The structures that support and deliver the services of Jewish education must be strengthened to become more effective in implementing change and reform.
- C. The question was raised as to whether the current structures are appropriate. It was suggested that new structures, new mechanisms, consortia between existing institutions should be developed - for example, between the federations that can fund, the denominations that deliver services and the community centers.

##

To: Shmuel Wygoda:

From: Barry Holtz

A. I looked at your agenda briefly, faxed it to Gail and discussed it with her, although she still hasn't seen it yet. First reaction: on the surface it covers all the issues BUT we are both concerned that it nowhere deals directly at any rate with what we are both concerned with in addition to all this content: Namely, how is the CIJE supposed to work next year; what is the role of alan, barry, gail? what is the day to day role of Israel and the Mandel inst.? who is responsible for what? This is needs time for discussion, somewhere, somehow.

B. Have you spoken with Milwaukee yet as we talked about at the last telecon?

C. Tomorrow at around 9:15 NY time, I am going to call the Mandel Institute to speak to Seymour about where and how I should send the next volume of Best Practices, as per our conversation at the telecon. You will be getting this fax when you get in in the morning. If Seymour will not be there at 9:15 my time can you let me know when I can reach him?

This fax is being sent from my home machine and I will be at home all day on Tuesday: 212-864-3529 ((phone)); 212-864-6622 (fax)..

Thanks..

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**Council for Initiatives
in
Jewish Education**

Date sent: 8/2 Time sent:
To: Annette Hochstein, Seymour Fox
Shmuel Wygoda, ADH
Organization: My80da

No. of Pages (incl. cover): 18

From: Ginny Levi

Phone Number:

Phone Number: (216) 391-1852

Fax Number:
0119722 619 951

Fax Number: (216) 391-5430

Comments:

Team,

Here are the minutes and assignments of the latest telecon.

Also, a copy of the current attendance list for the August 26 meeting in New York plus a memo from Ginny.

Mary Esther

If there are any problems receiving
this transmission, please call:
216-391-1852

MINUTES: CIJE STAFF TELECONFERENCE

DATE OF MEETING: July 29, 1993

DATE MINUTES ISSUED: August 2, 1993

PRESENT: Seymour Fox,, Stephen Hoffman,, Alan Hoffmann,, Barry Holtz,, Shmuel Wygoda,, Henry L. Zucker,, Virginia L. Levi,, ((Sec'y))

COPY TO: Morton L. Mandel,, Ann Klein,, Gail Dorph,, Annette Hochstein

I. The minutes of July 22 were reviewed.

A. It was reported that a letter had been sent to Gershon Kekst inviting him to attend the August 26 board meeting.. VFL will fax a copy to SF prior to their meeting on August 3.

B. VFL will send the staff group a list of the current response to attendance at the August 26 board meeting.

Assignment

III. Preparation for August 26

A. Contacts with campers

Telecon participants were asked whether any camper contacts had yielded information that might impact the agenda of the meeting.. It was noted that there is a sense of optimism among board members when they hear about the appointments of Gail Dorph and Barry Holtz.. No one had heard any concerns that should be addressed at the meeting.

SF will call Paul Steinberg in advance of the meeting.

B. Materials to be mailed in advance

1. The report by Barry Holtz has been approved. BH will send a clean copy to VFL for inclusion in the packet to be mailed.

2. Adam Goren's paper has been submitted to the Mandel Institute for review. A final version will be sent to VFL as soon as it is approved.

3. The progress report will be completed in Jerusalem and sent to VFL by August 6.

4. VFL will draft a cover letter from MLM to accompany the materials. The letter should announce Alan Hoffmann's appointment and comment on staffing.

Assignment

Assignment

Assignment

- C. VFL will draft a press release announcing the staff appointments which will be sent to JTA for release on August 26.

D.. Agendas

1. Executive Committee

It was agreed that MLM will refer to the 1993 budget and to any news on funding in his introductory remarks.. ARH will be prepared to give a progress report,, focusing on issues that were raised at the February executive committee meeting and progress which has been made in each area.

ADH has drafted a work plan which has been sent to MLM for review. This is intended as an internal document and should not be distributed to the executive committee.. However, ADH will be prepared to provide a detailed report on plans for the coming year.

Assignment

SHH will consider whether the CJF commission and its relationship to CIJE should be referred to during this meeting.. The conclusion as of July 29 is that this might better be discussed in a group to include MLM, ADH, SHH, Jon Woocher and CJF representatives..

2. Board Meeting

The draft agenda was reviewed. ADH plans to provide an oral, broad position description for each of the staff people,, but believes it is premature to distribute a written organization chart. He noted that the role of planner remains open..

In discussion, it was suggested that the relationship between Cleveland and Jerusalem is clear. Cleveland is the central address of CIJE, and is the address to be used for Alan, and the Mandel Institute staff serves as consultants to Alan and CIJE.

It was agreed that the talking points drafted for Chuck Ratner and reviewed with him in June remain appropriate. If any changes arise as a result of the Baltimore Lead Communities meetings, Chuck will be informed.

The presentations to be made by the Lead Community lay leaders are to be discussed in Baltimore.

Adam Gamoran met with Esther Leah Ritz on July 28 and believes she is well prepared to introduce the monitoring, evaluation & feedback report. Barry Heltz plans to talk with John Colman, to prepare him to introduce the Best Practices report.

Assignment

Assignment

VFL will work with MLM on the recommendation of a person to give the D'Var Torah when attendance results are more complete..

III. Staff Meeting (August 19 - 20)

ADH is working on an agenda and will consider the suggestion that Ellem Goldring's memorandum on data analysis of the principals survey be discussed at that time..

Assignment

BH will try to get an overhead projector from JTS and bring it to the American Friends of Hebrew University..

IV. Lead Communities Meeting (August 23 - 24)

The schedule was confirmed. SW has received recommendations from Milwaukee and Baltimore for items to be included on the agenda and will circulate them to the telecon group. He is waiting to hear from Atlanta.

Assignment

ARH and SW will be in touch with Adam Gamoran to discuss what is expected of him at the meeting.

V. Report on Conversation with John Ruskay

BH reported having been invited to a meeting at UJA/Federation to talk with John Ruskay and a small group about their continuity efforts.. When asked if CIJE were interested in being involved, BH offered to serve as liaison.

It was agreed that this would be useful and noted that it may serve as a model for how we might begin to have impact on communities beyond the three Lead Communities.

VI. November Lead Communities Meeting

In an effort to plan ahead and provide the Lead Communities with as much advance notice as possible, plans are under way for a November 16 meeting in Montreal in conjunction with the GA. It was suggested that the meeting begin at noon on Tuesday, November 16 in order to allow enough time for people to arrive in Montreal. We would conclude in the early afternoon of Wednesday, November 17,

VII. Status Reports on Communities

A: Milwaukee

Assignment

- 1: Milwaukee is looking for someone to meet with them in their commission October to help establish a vision for Jewish education. It was agreed that BH will call Ruth Cohen for details on what they seek and how this differs from what Jonathan Woocher was asked to do. It may be that we will propose BH for this purpose.

segment

2. Milwaukee also needs help with strategic planning. It was suggested that we consider recommending Roy Feldman of Boston, who does this professionally. Another possibility is someone from Washington D.C. who has work with Barry Shrage. VFL will call Shrage to get his name.

B.. Atlanta

1. SHH has spoken with Steve Gelfand, who will be taking a larger role in the Lead Community project. He reported that Atlanta is working on two tracks: the development of a five year strategic plan and a work plan on how to implement the recommendations of the Banks report. The latter will be shared with CIJE when it is completed.
2. SF has spoken with David Blumenthal of Emory University. He and ADH will continue to work with Emory to establish a relationship for the project.
3. Lauren Azoulai has been in touch with BH for additional guidance on improving Jewish education through the JCC and the relationship of JCC to religious institutions in the community. It was noted that Barry Chazan is the JCCA liaison to Atlanta. This remains an open item.

C.. Baltimore

SHH spoke with Darrell Friedman about the importance of Baltimore sharing documents with CIJE at the draft stage. This was in reference to the Baltimore strategic plan for Jewish education. The broader issue of communication between CIJE and each Lead Community remains open.

- VIII. It was agreed that there will be no further telecons before the meetings in New York and Baltimore in August.



- ☐ ASSIGNMENTS
☒ ACTIVE PROJECTS
☐ RAW MATERIAL
☒ FUNCTIONAL SCHEDULE

FUNCTION	CIJE STEERING COMMITTEE
SUBJECT/OBJECTIVE	FOX ASSIGNMENTS
ORIGINATOR/PROJECT LEADER	VFL
DATE	7/29/93

NO.	DESCRIPTION	PRIORITY	ASSIGNED TO (INITIALS)	DATE ASSIGNED STARTED	DUE DATE	COMPLETED OR REMOVED DATE
1.	Finalize arrangements for Blaustein grant with D. Hirschhorn.		SF	7/22/93	8/15/93	
2.	Contact the following board members in preparation for the August 26 meeting and send brief report to VFL: a. Alfred Gottschalk b. David Hirschhorn c. S. Martin Lipset d. Florence Melton e. Paul Steinberg f. Isadore Twersky		SF	2/25/93	8/15/93	
3.	With AH and BH, draft a job description for Barry Holtz.		SF	5/19/93	8/19/93	
4.	With SHH, develop a plan for involving denominations in each Lead Community process.		SF	3/31/93	12/1/93	



AMERICAN JEWISH ARCHIVES

- ☐ ASSIGNMENTS
- ☐ ACTIVE PROJECTS
- ☐ RAW MATERIAL
- ☐ FUNCTIONAL SCHEDULE

7/29/93 (REV. 11/89) PHOTOCOPIED IN U.S.A.

SEE INSTRUCTIONS MANUAL PAGE 15
FOR GUIDELINES ON THE COMPLETION
OF THIS FORM FOR A FUNCTIONAL SCHEDULE

FUNCTION	CIJE STEERING COMMITTEE
SUBJECT/OBJECTIVE	HOCHSTEIN ASSIGNMENTS
ORIGINATOR/PROJECT LEADER	VFL
DATE	7/29/93

NO.	DESCRIPTION	PRIORITY	ASSIGNED TO (INITIALS)	DATE ASSIGNED STARTED	DUE DATE	COMPLETED OR REMOVED DATE
1.	With SM, discuss with Adam Gannan what is expected of him at August 26 meeting..		ARH	7/29/93	8/6/93	
2.	Prepare a recommendation for a policy on the use of materials and data generated by CIJE.		ARH	7/9/93	8/12/93	
3.	Contact the following board members in preparation for the August 26 meeting and send brief report to VFL: a. David Arnow b. Norman Lamm c. Esther Leah Ritz d. Ismar Schorsch		ARH	2/25/93	8/15/93	
4.	With SF and BH, draft a job description for Barry Holtz..		ARH	5/19/93	8/19/93	
5.	With VFL, develop plan to support each item on the CIJE PERT chart.		ARH	5/19/93	8/31/93	



PREMIER INDUSTRIAL CORPORATION

SEE MANAGEMENT MANUAL POLICY NO. 15
RE: WORKSHEET ON DISSEMINATION
OF THIS FORM FOR A FUNCTIONAL SCHEDULE

- ☐ ASSIGNMENTS
- ☐ ACTIVE PROJECTS
- ☐ RAW MATERIAL
- ☐ FUNCTIONAL SCHEDULE

72890 (REV. 1/89) PRINTED IN U.S.A.

FUNCTION	CIJE STEERING COMMITTEE
SUBJECT/OBJECTIVE	S HOFFMAN ASSIGNMENTS
ORIGINATOR/PROJECT LEADER	VFL
DATE	7/29/93

NO.	DESCRIPTION	PRIORITY	ASSIGNED TO (INITIALS)	DATE ASSIGNED STARTED	DUE DATE	COMPLETED OR REMOVED DATE
1.	Explore availability and cost of office space at UJA/Federation ..		SHH	7/9/93	7/30/93	
2.	Consider whether the CJF commission and its relationship to CIJE should be referred to during August 26 meeting.		SHH	7/29/93	8/6/93	
3.	Contact the following board members in preparation for the August 26 meeting and send brief report to VFL: a. Jay Davis b. Charles Goodman c. Marvin Lender d. Norman Lipoff e. Charles Ratner f. Bennett Yanowitz		SHH	2/25/93	8/15/93	
4.	With HLZ, talk with MLM about the advisability of approaching Jesselson family to partner with Jim Joseph grant.		SHH	6/8/93	8/15/93	
5.	Call Carl Sheingold to talk about TIME slot on the GA agenda.		SHH	7/22/93	8/19/93	
6.	Propose to MLM that he talk with Roy Hoffberger about the Lead Community process in Baltimore and provide an outline of discussion points.		SHH	3/24/93	TBD	
7.	With SF, develop a plan for involving denominations in each Lead Community in CIJE.		SHH	3/31/93	TBD	
8.	With Alan Hoffmann, confer by telephone with chief professional of each Lead Community to encourage them to interview Senior Educators.		SHH	5/19/93	TBD	



PREMIER INTERNATIONAL CORPORATION

SEE MANAGEMENT MANUAL ROBERT NO. 85
FOR SCHEDULES ON THE COMPLETION
OFFICE FROM FOR A FUNCTIONAL SCHEDULE

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7/22/93 (REV. 1/89) PRINTED IN U.S.A.

FUNCTION	CIJE STEERING COMMITTEE		
SUBJECT/OBJECTIVE	A HOFFMANN		
ORIGINATOR/PROJECT LEADER	VFL	DATE	7/22/93

NO.	DESCRIPTION	PRIORITY	ASSIGNED TO (INITIALS)	DATE ASSIGNED STARTED	DUE DATE	COMPLETED OR REMOVED DATE
1.	Draft a mission statement for the Lead Communities project.		ADH	7/22/93	8/19/93	
2.	Redraft PERT chart on which clear milestones for CIJE are highlighted.		ADH	7/22/93	8/19/93	
3.	Work with CRB Foundation to clarify relationship of Israel experience programs to Lead Communities.		ADH	7/22/93	8/19/93	
4.	With staff, prepare time line and action plan for CIJE.		ADH	6/17/93	8/20/93	
5.	Consider what planning support Milwaukee requires and how best to help.		ADH	7/22/93	TBD	



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728850 (REV. 11/83) PRINTED IN U.S.A.

FUNCTION	CIJE STEERING COMMITTEE
SUBJECT/OBJECTIVE	HOLTZ ASSIGNMENTS
ORIGINATOR/PROJECT LEADER	VFL
DATE	7/29/93

NO.	DESCRIPTION	PRIORITY	ASSIGNED TO (INITIALS)	DATE ASSIGNED STARTED	DUE DATE	COMPLETED OR REMOVED DATE
1.	Call Ruth Cohen about a speaker for Milwaukee meeting in October to help establish a vision for Jewish education.		BH	7/29/93	8/1/93	
2.	Send clean copy of report to VFL for inclusion in packet to be mailed in advance of August 26 meeting.		BH	7/29/93	8/6/93	
3.	Contact the following board members in preparation for the August 26 meeting and send brief report to VFL: a. Gerald Cohen ■ done b. Susan Crown c. Billie Gold d. Neil Greenbaum - done e. Thomas Hausdorff f. Mark Lainer - done g. Matthew Maryles - done h. David Teutsch - done		BH	6/30/93	8/15/93	
4.	Meet with J. Woocher for guidance on approach to mailing publications.		BH	7/22/93	8/19/93	
5.	Get an overhead projector from JTS to bring to the American Friends of Hebrew University meeting.		BH	7/29/93	8/19/93	
6.	With SF and ARH, draft a job description for Barry Holtz.		BH	5/19/93	8/19/93	
7.	Talk with John Colman, to prepare him to introduce Best Practices report at the August 26 meeting.		BH	7/29/93	8/20/93	
8.	Prepare a memo summarizing proposal on distribution of CIJE materials.		BH	5/28/93	8/21/93	
9.	Work with Atlanta on filling the position of Director of the Lead Community project.		BH	6/16/93	12/15/93	
10.	Begin work with Baltimore on a pilot project.		BH	3/5/93	TBD	
11.	Prepare suggestions for how to proceed with pilot projects in Atlanta.		BH	3/5/93	TBD	
12.	Work with Milwaukee on pilot projects.		BH	4/29/93	TBD	

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73890 (REV. 1/90) PRINTED IN U.S.A.

FUNCTION	CIJE STEERING COMMITTEE
SUBJECT/OBJECTIVE	LEVI ASSIGNMENTS
ORIGINATOR/PROJECT LEADER	VFL DATE 7/29/93

NO.	DESCRIPTION	PRIORITY	ASSIGNED TO (INITIALS)	DATE ASSIGNED STARTED	DUE DATE	COMPLETED OR REMOVED DATE
1.	Call Barry Shrage to get name in Washington D.C. to help Milwaukee with strategic planning.		VFL	7/29/93	7/30/93	
2.	With SW, draft a written progress report to be sent to the board in early August.		VFL	6/17/93	8/1/93	
3.	Send current attendance list to staff group.		VFL	7/29/93	8/2/93	
4.	Draft a cover letter from MLM to accompany materials to be sent out in advance of August 26 meeting.		VFL	7/29/93	8/12/93	
5.	Work with MLM on the recommendation of a person to give the D'Var Torah when attendance plans are more complete.		VFL	7/29/93	8/12/93	
6.	Draft a press release announcing staff appointments which will be sent to JTA for release on August 26.		VFL	7/29/93	8/15/93	
7.	Work with CJF to schedule a meeting of CIJE with Lead Community representatives on 11/16, in conjunction with the GA.		VFL	7/22/93	8/19/93	
8.	With ARH, develop plan to support each item on the CIJE PERT chart.		VFL	5/19/93	8/31/93	
9.	Plan to discuss letters of agreement for the Lead Communities. Consider including our expectations regarding the sort of lay and professional involvement we expect.		VFL	4/7/93	10/1/93	
10.	Schedule a telecon with Executive Committee members following a meeting of presidents and executives of partner organizations.		VFL	2/25/93	TBD	
11.	Develop a communications program: internal; with our board and advisors; with the broader community.		VFL	4/7/93	TBD	



PREMIER INDUSTRIAL (11/19/1983)

SEE MANAGEMENT MANUAL POLICY NO. 8.5
FOR GUIDELINES ON THE COMPLETION
OF THIS FORM FOR A FUNCTIONAL SCHEDULE

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73390 (REV. 1-83) PRINTED IN U.S.A.

FUNCTION	CIJE STEERING COMMITTEE
SUBJECT/OBJECTIVE	MANDEL ASSIGNMENTS
ORIGINATOR/PROJECT LEADER	VFL
DATE	7/9/93

NO.	DESCRIPTION	PRIORITY	ASSIGNED TO (INITIALS)	DATE ASSIGNED STARTED	DUE DATE	COMPLETED OR REMOVED DATE
1.	Contact the following board members in preparation for the August 26 meeting and send brief report to VFL: a. Charles Bronfman b. Max Fisher c. Lester Pollack d. Richard Scheuer		MLM	2/25/93	8/15/93	
2.	Consider establishing a finance committee..		MLM	4/7/93	8/31/93	
3.	Visit with Erica Jesselson to get her on board to support CIJE.		MLM	6/17/93	8/31/93	



- ☐ **ASSIGNMENTS**
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- ☐ **FUNCTIONAL SCHEDULE**

73200 (REV. 1/89) PRINTED IN U.S.A.

FUNCTION	CIJE STEERING COMMITTEE		
SUBJECT/OBJECTIVE	WYGODA ASSIGNMENTS		
ORIGINATOR/PROJECT LEADER	VFL	DATE	7/29/93

NO.	DESCRIPTION	PRIORITY	ASSIGNED TO (INITIALS)	DATE ASSIGNED STARTED	DUE DATE	COMPLETED OR REMOVED DATE
1.	With VFL, draft a written progress report to be sent to the board in early August..		SW	6/30/93	8/1/93	
2.	Ask each Lead Community to prepare notes on annual plan for Baltimore meeting..		SW	7/22/93	8/2/93	
3.	With ARH, discuss with Adam Gamoran what is expected of him at the August 26 meeting..		SW	7/29/93	8/6/93	



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72890 (REV. 1/88) PRINTED IN U.S.A.

FUNCTION	CIJE STEERING COMMITTEE	
SUBJECT/OBJECTIVE	ZUCKER ASSIGNMENTS	
ORIGINATOR/PROJECT LEADER	VFL	DATE 7/22/93

NO.	DESCRIPTION	PRIORITY	ASSIGNED TO (INITIALS)	DATE ASSIGNED STARTED	DUE DATE	COMPLETED OR REMOVED DATE
1.	Encourage MLM to invite a Jesselson family representative to August 26 board meeting.		HLZ	6/30/93	8/15/93	
2.	With SHH, talk with MLM about the advisability of approaching Jesselson family to partner with Jim Joseph grant.		HLZ	6/8/93	8/15/93	
3.	Schedule a telecon of MLM with Gershon Kekst to discuss CIJE.		HLZ	4/29/93	8/15/93	
4.	Schedule meeting of MLM, AJN, and HLZ to discuss CIJE funding.		HLZ	7/9/93	7/30/93	
5.	With VFL, prepare C. Ratner to report on Lead Communities at board meeting.		HLZ	6/17/93	8/15/93	
6.	Contact the following board members in preparation for the August 26 meeting and send brief report to VFL: a. Mandell Berman. b. John Colman c. Maurice Corson		HLZ	2/25/93	8/15/93	
7.	Encourage MLM to talk with Corky Goodman prior to scheduling a meeting with the presidents and executives of CJF, JCCA and JESNA.		HLZ	3/24/93	TBD	
8.	Arrange meeting for MLM with presidents and executives of CJF, JCCA and JESNA and second meeting to include CRB, Crown, Avi Chai, Wexner and other funders.		HLZ	1/28/93	TBD	

ATTENDANCE FOR AUGUST 26 MEETINGS IN NEW YORK

7/29/93

Who will attend meetings in New York?	YES	NO
David Arnow		X
Daniel Bader	X	
*Mandell Berman	X	
Chaim Botwinick	X	
*Charles Bronfman	X	
Gerald Cohen		X
*John Colman	X	
Maurice Corson		X
Rachel Cowan		
Susan Crown		X
Jay Davis	X	
Gail Dorph	X	
Genine Fidler		X
Irwin Field		X?
Max Fisher		
Seymour Fox	X	
Darrell Friedman		X
Adam Gamoran	X	
Jane Gellman	X?	
Billie Gold	X	
*Charles Goodman		X
Alfred Gottschalk		X
*Neil Greenbaum		X
Thomas Hausdorff		
*David Hirschhorn		
Annette Hochstein	X	
Stephen Hoffman	X	
Alan Hoffmann	X	

Barry Holtz	X	
Stanley Horowitz	X	
Gershon Kekst		
Ann Klein	X	
Henry Koschitzky		X
Martin Kraar	X?	
*Mark Lainer	X	
Norman Lamm	X	
Marvin Lender		
Ginny Levi	X	
Norman Lipoff		X
Seymour Lipset	X	
*Morton L. Mandel	X	
*Matthew Maryles	X	
Florence Melton		X
*Melvin Merians	X	
Rick Meyer	X	
Arthur Naparstek	X	
*Lester Pollack	X	
*Charles Ratner	X	
*Esther Leah Ritz	X	
Art Rotman	X	
David Sarnat	X	
William Schatten	X	
Richard Scheuer		
Ismar Schorsch		X
Louise Stein	X	
Paul Steinberg	X	
David Teutsch	X	
Isadore Twersky	X	
Ilene Vogelstein	X	
Jonathan Woocher	X	

Shmuel Wygoda	X	
Bennett Yanowitz	X	
Henry L. Zucker		X

NEMO TO: CIJE Counselors

FROM: Virginia F. Levi

vfl

DATE: July 30, 1993

This is to let you know that the teleconferences with the CIJE Executive and Search Committees have now been completed. All participants gave their enthusiastic endorsement for the appointment of Alan Hoffmann.

I have spoken with MLM, who agrees that it is now appropriate to report this appointment to board members during camper conversations. Telecon participants were also very pleased to hear about the team of Gail Donogh, Barry Holtz, Adam Gamoran and Ellen Geldring. You may wish to refer to this lineup in your conversations, as well.