

THE COMMUNAL EDUCATION RESTRUCTURING CONUNDRUM

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The recognition that the viability of the Jewish community is inextricably linked to Jewish education and widespread dissatisfaction with the effectiveness of the Jewish education delivery system have brought about a restructuring revolution. In the process, the roles, functions, structure, and even the very existence of central agencies for Jewish education have been questioned by federations in community after community. This article suggests a collaborative planning model that uses the assets and capabilities of the federations, central agencies, and the schools.

SETTING THE STAGE FOR THE RESTRUCTURING REVOLUTION: JEWISH EDUCATION RECEIVES PRIORITY STATUS

The Jewish Education/Continuity Linkage

Recently, *Jewish education*, in partnership with *Jewish continuity* as a means of strengthening Jewish identity, has taken a much more prominent place on the Jewish communal agenda. In cities across the continent communal leaders at all levels, both lay and professional, are deeply concerned about the future of the American Jewish community and Judaism. They are looking toward the coming century in light of recent data about intermarriage and assimilation and pondering where the Jewish community is going to be, both numerically and Jewishly, in the decades ahead.

Analysts agree—regardless of their notion of what constitutes Jewish living and commitment—that the viability of the Jewish community and the continuity of the Jewish people are inextricably linked to Jewish education and the effectiveness of the Jewish education delivery system. Jewish education is seen as the core of the enculturation process and considered to be a

major, if not *the* top, priority in almost every Jewish community.

Heightened Expectations for Change

This renewed interest in Jewish education, along with an intense desire for action to improve it, was evident at conferences convened by the Jewish Education Service of North America (JESNA) during the past 3 years and during the deliberations of the Mandel Commission on Jewish Education in North America. At the local level, a flurry of local commissions, task forces, and studies already completed, in progress, or planned are further indicators of this interest. Those completed are replete with a host of emerging planning and programmatic initiatives.

Although everyone is hopeful that this activity will bring about positive changes, many wonder whether the rhetoric will produce a real, long-term impact. Many doubt whether the obviously sincere pronouncements, planned programs, and newly created structures will be able to generate the massive financial and human resources needed to significantly improve the schools and programs.

A Broad Concept of Jewish Education

What is clear is that Jewish education is being seen in a new light. It is increasingly

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being viewed as all-inclusive and comprehensive, going beyond the traditional notion that sees it, primarily or exclusively, as formal schooling. It is seen as including the full range of programs designed to strengthen identity, knowledge, and commitment, blending both formal and informal (or as some prefer "in-school" and "out-of-school") programs. This broad scope is seen as necessary to ensure that the content of Jewish living is nurtured in a fertile environment of Jewish experience and that it encompasses participants from cradle to grave.

An Expanded List of Stakeholders

An essential aspect of thinking about Jewish education in this broader way is recognizing the increasing variety of Jewish education institutional stakeholders and service providers. Jewish education service delivery, in its varying forms, takes place not only under the purview of traditional bodies, such as schools and central agencies for Jewish education (often called or referred to as bureaus) but also at Jewish Community Centers, campus resources, synagogues, federations, and Zionist organizations. Jewish education means not only schooling but also family and adult education, camping, youth groups, retreats, Israel trips, etc. Moreover, Jewish education professionals in this framework are seen not only as program providers but also as an integral part of the Jewish continuity, communal planning process.

A growing sense of the urgency needed to address in new and bold ways the Jewish education/continuity crisis without further delay has brought about a widespread reassessment of communal responsibilities and roles, as well as Jewish education central service delivery systems, where they exist. There is almost universal dissatisfaction with the failure of Jewish education (with different interpretations of what is wrong and who is to blame). Now, with a more expansive understanding of the broad nature and global scope of Jewish

education, and with accompanying visions of new and exciting possibilities, communal leaders want change. This is where the *restructuring revolution* in Jewish education begins. Where it will end is yet to be determined.

THE MEANING OF RESTRUCTURING

Restructuring, a relatively new description of education change in the field of general education, means different things to different people and cannot be defined with precision. For many people, it is just another word for general school improvement. For others, it means site-based management, collaborative decision making, individualized learning, or integrated curricula, to mention just a few approaches. Its major proponents agree that the ultimate goal is to change the dynamics of interactions in the classroom to ensure higher expectations and achievement.

Relevant restructuring activities are taking place in school-based Jewish education, which is influenced by developments in the broader community. Yet, the current hot topic in the Jewish educational world, continent-wide—and the focus of this article—is a different although related restructuring. The discussions are not about reorganizing the schools or classrooms per se. Instead, attention is being given to the restructuring of central service delivery in local communities.¹

Although educational needs and the programs and services required to meet them are critical elements of the restructuring process, organizational structure, for many, has become a key, if not *the* major consideration. Community leaders are asking not only what should be the educational priorities but also these ques-

1. In reality, the two are related since what currently happens, or better yet, what does not happen in schools is a key factor in the Jewish education restructuring debate, and the outcome will clearly have an impact on the schools. Moreover, as with general education, the ultimate goal is improving the educational system.

tions: "What works best from a communal standpoint?," and "What is the best *structural* model for a central service body?" The desire for change is so pressing that alternative structures are being proposed and created scattershot in an attempt to do damage control even before the question of "what works" has been answered. It seems that the restructuring is moving along without guidance or direction. Some have called it a quick fix.

In an attempt to provide some guidance to the restructuring revolution in Jewish education, this article describes what is happening within the context of the communal, educational, and planning challenges, speculates on the potential of current restructuring efforts, outlines a basic framework for collaborative communal planning that might inform these activities, and identifies some of the components essential to the success of any structural arrangement.

ENVIRONMENTAL SCAN: EDUCATIONAL AND PLANNING CHALLENGES

The magnitude of the challenge and the complexity of the issues can be appreciated only by examining the Jewish education setting and its agenda of needs and issues. A central feature of this agenda is that it has to be implemented within a multidimensional and voluntaristic system with a myriad of independent and autonomous service providers. Many of these service providers desire and receive substantial communal funds, but are amenable only to the most limited levels of fiscal accountability. In educational matters, local, not to mention continental and international, resource and coordinating agencies have no authority. It is not difficult, therefore, to understand why communal planning, collaboration, and central service delivery are a monumental undertaking, with no guarantee of success.

In addition to the manifold philosophical and ideological questions underlying the entire Jewish education enterprise, there are a host of interrelated political

and administrative issues calling for communal decisions that require both funding and educational expertise. Those involved with restructuring need to consider how, and to what degree, their new or reorganized central structures will deal with these issues. A brief status report for each issue and some of the corresponding communal challenges and responsibilities are presented below.

Educational Modes

STATUS: There are a plethora of direct service providers and a profusion of programs in many local communities. However, in many other communities, major educational programmatic components are either deficient or missing altogether.

CHALLENGE: Providing effective programs that encompass and integrate both horizontal (i.e., a wide variety of modes both informal as well as formal) and vertical (i.e., all age levels) axes is a communal responsibility in which all stakeholders have a part. The potential program menu is vast. Communities need to look systematically at the full range of potential service recipients and then set priorities, since limited resources preclude meeting all needs with the same level of intensity. Decisions must be made about who will do what and who will pay for it.

Outreach

STATUS: Large segments of the population are "out of the loop" altogether; others are connected only tenuously.

CHALLENGE: Strengthening ties with some segments of the community, reaching out to others, involving the unaffiliated, and ensuring that Jewish education is available to all segments of the population are communal responsibilities. Communities must provide the right programs in the right places. In light of limited human and financial resources, difficult and controversial decisions must be made about where to focus communal resources.

Human Resources Development

STATUS: The shortage of teachers, communal educators, and administrators is *the* number one problem continent-wide.

CHALLENGE: All communities must address aggressively the interrelated staff training, recruiting, and retention needs of their institutions. Massive action and funds are needed. Decisions must be made about pre- and in-service education, staff development, licensing, supervision, evaluation, salaries, benefits, incentives and overall upgrading of the field.

Financial Resources Development and Accountability

STATUS: Rising costs and larger budgets have led to increased demands for community dollars for Jewish education from many sectors. Quality varies greatly, and accountability mechanisms are generally limited where they do exist. There are few, if any, generally agreed upon communal educational aims or goals, as is the case in many of the educational institutions themselves. Reciprocal accountability mechanisms—among federations, bureaus, and educational institutions—are usually tenuous, and allocations are often made based on expediency.

CHALLENGE: Communities need to ensure that programs are both effective and efficient. Adequate resources must be provided, ideally using allocation methods that stimulate improvement and promote accountability. Communities need to address issues of quality control, institutional effectiveness, evaluation, and accreditation.

Communal Dynamics and Collaborative Planning Activities

STATUS: Communal dynamics and Jewish educational planning, programming, and effectiveness are closely linked in many, if not most communities. Often, if not most of the time, Jewish education problems and issues are not substantive educational

issues at all, but rather are ideological or personality conflicts and “turf” issues. Cooperation and collaboration among service providers are often nonexistent at worst or minimal at best. All of these have a negative impact on the loosely coupled Jewish educational enterprise.

Although many observe that this state of affairs is inherent in a voluntaristic setting, others emphasize that the “everyone-making-Shabbos-for-himself” approach can no longer be tolerated because the ubiquitous and perennial financial issues have now reached crisis proportions. Moreover, individual schools can rarely address many of the issues alone and need assistance. Positive federation-bureau relationships are seen as critical since their combined ability to present a common vision to the educational institutions enhances the prospects of success.

CHALLENGE: More than ever before, collaborative and concerted community-wide advocacy efforts, systematic planning, and effective and efficient coordination of central services for Jewish education must be achieved if the Jewish community expects to succeed. Experience has shown that the only way to address these matters effectively is through a carefully implemented communal planning process and delivery system. Although there is no universal formula that dictates precisely how a community should conduct its planning and implementation processes, there are a number of basic ingredients: needs assessments, goal setting, resource development, program implementation, and evaluation. These must be carried out in a thoughtful, systematic manner and involve all stakeholders. “Muddling through” will no longer do the job—if it ever did.

Overall, there is a critical need for communities to share experiences and examine comprehensively and definitively the range of underlying issues, respective roles and responsibilities, and current and potential structural models of community-wide advocacy, planning, coordination and service delivery for Jewish education. This exam-

ination must be done within the context of functional needs.

More specifically, there is a need to do the following:

- reduce confusion and/or conflict caused by the lack of a common terminology regarding planning, accountability, and quality
- clarify the respective roles of federations, central agencies, schools, synagogues, and other educational service providers in educational planning and/or implementing programs and activities
- create equitable, collaborative communal planning processes involving and utilizing the resources of all stakeholders in providing for a wide range of qualitative educational programming
- create appropriate forums, opportunities, and mechanisms to improve communications, create more effective consensus-building and decision-making mechanisms, and establish more positive communal environments
- ensure that the plans emerging from these processes are implemented effectively

Leadership Development

STATUS: There are many capable lay leaders working with educational institutions and serving as strong advocates for Jewish education, but a great deal more are needed. Federations and other activities in the broader community with more apparent prestige attract top leadership much more easily.

CHALLENGE: The ability to deal effectively with community dynamics, to meet substantive Jewish educational needs, and to implement joint and/or collaborative programs is all contingent upon the involvement of knowledgeable and committed leaders. Creating and developing a cadre of top lay leadership to work collaboratively with the professionals within all these areas are major challenges. In particular, there is a need to develop leaders who ap-

preciate and respect different values and perspectives and who can function in a pluralistic environment.

Change and Transition

STATUS: Dynamic changes are taking place in a number of key areas that already are and will continue to affect both the Jewish community at large and Jewish education in particular:

- long-standing roles and relationships among program providers, national and local communal agencies, and funding sources (e.g., schools, central agencies, federations, synagogues, denominational bodies, foundations, endowments, and task forces and commissions), which will have a tremendous impact on planning for Jewish education and the setting of program priorities
- American society and the broader spectrum (e.g., the economy, demography, geography and mobility, ethnicity and public education), which will have a significant impact on funding and personnel
- Israel-based matters (e.g., Jewish Agency/WZO restructuring, educational resources, and geopolitical matters) and larger trends in Jewish life (e.g., intermarriage and interdenominational tensions), which continue to have important ramifications for Jewish educational planning, program initiatives, resources, and relationships

CHALLENGE: Under ordinary circumstances dealing with the educational challenges is difficult and calls for high levels of cooperation. In a time of transformational change, communities must make an even stronger effort to work together.

FEDERATION/BUREAU RELATIONSHIPS: THE CURRENT STATE OF AFFAIRS

Although there are many Jewish education stakeholders, the two key communal players in the unfolding restructuring scenario are

the federations and the central agencies for Jewish education. Traditionally, federations have been the central address for communal funding, planning, and coordination, but have usually kept at arms length from Jewish education except to fund it. The central agencies for Jewish education have been considered the central address for a wide range of similar activities (in a somewhat different order) in Jewish education. For decades, they have been the communal centerpiece of the Jewish education infrastructure and have been responsible for Jewish education central services in most large and large-intermediate cities.

Central agencies, however, are not monolithic. There are two basic types: (1) coordinating and service agencies with different levels of services and programs depending on size, sometimes including schools (usually, but not always, found in large communities, such as Boston, Chicago with two bureaus, Miami, and New York, and in large-intermediate ones, such as Cincinnati, Milwaukee, and Rhode Island and (2) communal supplementary schools or school systems including both supplementary and day schools (usually, but not always, found in small communities, such as Dayton, Portland, and Springfield). Structurally, both types are usually autonomous, but a few are functional federation committees, such as in Bridgeport, Hartford, Houston, and Oakland.

In many communities there is a long history of collaboration between the federation and the central agency, with the central agency serving as the Jewish education specialist in meeting a wide range of needs. In others the relationships have not always been satisfactory. Today, roles and relationships are being systematically examined. Concrete changes—sometimes major ones—have already taken or are in the process of taking place, sometimes in an environment of tension and controversy. In most instances, the initiation for change has come from the federations, as they exhibit an ever-increasing interest in Jewish education

even as they struggle to balance communal budgets in the face of serious financial shortages. The issues are complex and involve the most sensitive aspects of communal dynamics: people and personalities, power and purse. Many in the central agencies, for example, see finances as the real reason for the pressure. Federation leaders acknowledge that funding is a critical factor, but assert that concern about continuity in light of serious deficiencies in educational planning and programming is the primary issue.

The struggle takes place in an environment with many challenges and changes. Ironically, not only are local federations and central agencies both greatly involved in dealing with changes in the community at large and the world of Jewish education in particular—with a joint responsibility to help others adjust to them—but as part of the dynamic process they are themselves experiencing change in their own relationship with each other.

CENTRAL AGENCY RESTRUCTURING

Federation Initiatives

It is not clear exactly when the “revolution” began, but during the past few years a number of leading communities have created or are in the process of creating task forces or commissions with mandates to conduct major Jewish identity/continuity/education studies examining the range of current and projected needs and the delivery systems in their respective communities. In multi-year processes involving a broad spectrum of stakeholders, they have explored (or are in the midst of exploring) needs, functions and programs, institutions, and communal delivery structures, as well as the respective roles of local federations, central agencies, and other communal agencies. In one way or another they have focused on long-range planning for Jewish life and education while at the same time assessing, usually indirectly, the effectiveness of their central agencies, the current

status of their relationship, and respective Jewish educational planning and programming roles, both current and future.

The status of central agency-federation relationships can be measured by the role or absence of role assigned to the central agencies in the study processes themselves, e.g., representation by bureau lay and professional leaders. Another measure is the projected future roles for the central agencies. As expected, these indications vary from community to community, but overall are showing a tendency toward greater roles for federations not only in planning but also in providing education programs by either offering them directly or assigning them to or coordinating them with other agencies in the community, such as JCCs. These actions appear to represent a lack of faith in the bureaus.

Frontal Attack on the Central Agency

Why the no-confidence vote? Why have federations targeted the bureaus so swiftly and aggressively? For a long time there have been many complaints in federation circles and elsewhere about the quality of Jewish education. There has been especially harsh criticism of the supplementary schools (both elementary and high) that the majority of students attend. The bureaus, which have been extensively involved with these schools, are being held accountable for them, even for the congregational schools where their influence is limited.

With day schools, on the other hand, where quality varies and educational, financial, and governance problems also often exist, there is a great deal of satisfaction. They are viewed as highly effective with substantially increased enrollment over the past few years. Yet, many bureaus provide only limited services to day schools, either because day schools do not feel they need any assistance, or because when they do, the bureaus lack the resources to be of much help. In many communities there is no relationship, although bureau services are extensive in such cities as Los Angeles,

Miami, New York, Chicago, and a few other places with abundant day schools.

Even more important, it has been felt that, as central coordinating bodies, bureaus should be doing more planning and "expanding their horizons" beyond the schools—although federations have usually not made it clear what that means or helped them do so. Some have moved in new directions, but many others have not. One leading bureau director, for example, exclaimed once, "I am not a planner." Another, speaking somewhat authoritatively for his colleagues, proclaimed, "We are schoolmasters!" Yet, when the few bureaus that have planning expertise do engage in planning, they are often preempted by federation. It is not difficult to see how the current confrontation has developed.

Questions about roles and functions, organizational structure, and overall effectiveness of a significant number of large central agencies have led to doubts not only about them but the very concept they embody wherever they exist. More than a few federation leaders have said, "What do we need a central agency for? The supplementary schools are not worth much; give all the money to the day schools!" In some communities, day school graduates are beginning to swell the leadership ranks, further strengthening that view. Among the activities that federation leaders want bureaus to do more of are the following:

- broaden their scope beyond the schools and become more involved with informal education
- become more involved with day schools
- reach out to the unaffiliated
- interact more with other communal agencies
- improve relationships with the denominations
- intensify supplementary school consultations
- plan more effectively
- sharpen the focus and limit the number of services and programs

The central agencies find themselves in a "catch 22." They are being asked to do more with less and, in the same breath, are requested to broaden their scope while sharpening their focus. Moreover, much of what they are being asked to do depends on others. Success in building bridges with the congregational supplementary and denominational day schools is usually contingent on the status of federation/synagogue relationships, which often need to be improved. In the meantime, restructuring continues, as seen in these examples:

- In many central agencies there are probing questions, intensive scrutiny, and in some instances attempts by federation to become involved extensively with aspects of programmatic management.
- In many central agencies budgets have been drastically cut with services scaled down, and in a few instances programs were moved to other agencies, including the JCC and the federation.
- A few central agencies have been put out of operation or taken over by the federation permanently (or on an interim basis pending further study).
- A variety of new models are on the drawing board or are almost ready to be implemented, including (1) assigning former central agency functions to day schools or other educational institutions, (2) having a foundation replace the central agency, (3) having the JCC take over the central agency, and (4) reinstating an earlier model by merging the central agency and the local Hebrew college.

Inventive thinkers are already contemplating integrated models that incorporate the best of the current agencies and the most creative of the new ones. In the meantime, local federations are moving ahead on a unilateral basis through the task force or commission process on a community-by-community basis. The future of the central agency as an institution is in question.

More important, to the extent that central services contribute to its success, the future of Jewish education hangs in the balance.²

If there are any doubts about the pervasiveness of this phenomenon consider some of the communities involved with actual restructuring or other critical assessments: (1) in the large city category—Atlanta, Baltimore, Boston, Chicago (BJE), Cleveland, Detroit, MetroWest, New York, Philadelphia, and Washington—and (2) in the large intermediate and intermediate category—Buffalo, Hartford, Indianapolis, Louisville, Mercer/Bucks, Milwaukee, New Orleans, Rochester, Seattle, and St. Paul.

Central Agency Reactions

Many central agency lay and professional leaders are "up in arms" at the challenge to their long-acknowledged leadership role in Jewish education coordination and service. Others are bewildered about why the restructuring revolution is occurring now. As mentioned earlier, many attribute it to flat campaigns and critical limitations in communal financial resources. Others, with a more positive perspective, see federations taking over a newly discovered treasure. Some outside the bureaus observe that the recent turn of events is merely the culmination of decade-long federation dissatisfaction with and questions about central agency effectiveness. These issues have now come to the fore at both federation and central agency levels because *pikuach nefesh* (i.e., survival) is now an issue—at the federation level, survival of the community, and at the central agency level, survival of the central agency concept (i.e., as an institution), no less than the individual central agency itself.

2. An entire issue of *Jewish Education* (Fall-Winter, 1990) entitled, *Reflections on the Central Agency for Jewish Education: Status and Challenge*, is devoted to the topic. It is the most comprehensive treatment of this topic to date with a full range of articles by academics, communal professionals, denominational educational leaders and bureau directors.

It should come as no surprise then that many central agency leaders feel that overall their relationships with federation have seriously deteriorated and are at an all-time low. These feelings are especially strong in communities where the central agency is almost literally under siege. The exchanges are often bitter. Federations begin by criticizing how the agencies are addressing the needs. The central agencies, in turn, respond that federations should provide clearer directions regarding communal priorities, greater moral support rather than less, and the human and financial resources to do the job. Above all, they do not want to be held responsible for global matters that are inherent in the nature of the Jewish community and beyond their control. A common quip, which has an important message, is, "What makes the federation think it can do any better, with the same limited human and financial resources?"

Restructuring on a More Positive Note

As always, there are a few notable exceptions where relationships can be characterized as very good to excellent. Moreover, the overall picture itself is a pattern of both positive and negative modes of interaction. In a number of communities new autonomous central agencies are being created out of existing federation Jewish education commissions or departments and communal schools, and in some communities Jewish education commissions are becoming functional or more functional (Bridgeport, Columbus, Dallas, North Jersey, Palm Beach, South Broward, Tidewater, and Tucson). A number of other communities whose central agencies are constituted as communal schools have (or are in the process of) restructured their central agency-communal school to include the local community day school (Des Moines, Louisville, and New Orleans). This model already exists in such places as St. Paul, Toledo, and Youngstown.

RESTRUCTURING: PROSPECTS AND POTENTIAL

Keeping in mind that Jewish communities are not monolithic and that a variety of approaches may be called for, let me share some observations and reactions to the restructuring revolution.

- *Restructuring is moving too fast.* Virtually all communities are asking the same questions and going through similar processes to address the challenges. Some are moving too quickly, dismantling where retooling might suffice, or restructuring where better communications and collaborative planning would be acceptable.
- *Restructuring may be harmful.* It is not clear that restructuring is always the answer. It may be a partial or total solution or none at all. Some of these restructuring approaches may be effective; others may not only be ineffective and inefficient but may also make things worse. In the long run they may be detrimental to the creation of an effective service delivery system.
- *Communities need direction.* In an attempt to address these urgent communal planning issues, communities, like their own local educational institutions, will continue to "make Shabbos for themselves," unless some guidance is forthcoming.
- *A research base is needed.* Although many evaluation studies, which have usually been commissioned by federations, have been conducted of individual central agencies, no one has done any kind of definitive study of central-service models, nor has there been a systematic assessment of how well federations themselves plan for and fund Jewish education central services. Moreover, it has been decades since the last global examination of American Jewish education. Evaluating central services without examining the needs of direct-service providers (supple-

mentary and day schools, JCCs, and others) misses the point. In the communal environment everyone plays a role and is accountable. Many of the problems are not located in the bureaus, but elsewhere.

- *People have to communicate regardless of structure.* In all likelihood, without some changes in the way that communities plan for Jewish education, the restructured bodies, whatever their form or substance, will face a similar fate in the future to the present central agencies, probably sooner rather than later. Unless community leaders can learn to work together more effectively, all is for naught. Working together means more and better communications, increased cooperation, and greater collaboration. It also means grappling with the tough, value-laden educational issues underlying many of the priority-setting decisions that must be made, making those decisions, and then implementing them.

The challenges are enormous, and if the needs are to be addressed, strategic (i.e., transformational) planning must occur and must involve federations, central agencies, and many other agencies and providers working together. It is not the time for improvised, piecemeal solutions since the future of the Jewish community is at stake. What is also clear is that some communities are doing better than others in planning for change in Jewish education. Although each community is unique and planning must be individualized, there is much we can learn from one another in terms of basic principles.

PLANNING IN A SYNERGISTIC MODE

There are no simple solutions to these complex issues, but there is a crucial need to establish a basic, conceptual framework to inform the planning process. The model that I propose could be called "Basic Planning for Beginners" or, better yet, "things we know, but don't always practice." Utilizing such a model will accomplish three objectives:

lizing such a model will accomplish three objectives:

1. provide a common language for any discussions about roles and relationships
2. serve as a point of departure in thinking about different structural and functional relationships
3. establish that we are not dealing with an either/or situation when planning for Jewish education; the federation, the central agency, the schools, and other educational institutions are all an integral part of the planning process—each with its own area of jurisdiction, responsibility, and expertise, and each accountable to the other, its clients, and the community

The Mega/Macro/Micro Planning Model

According to Kaufman and Herman (1991a & b), from the standpoint of an individual organization, all planning, especially strategic, should take place at three levels:

1. **mega level**, which addresses the organization's relationship with the broader community and society
2. **macro level**, which deals with the organization itself
3. **micro level**, which addresses specific components within the organization

The model of collaborative planning makes high levels of communication an absolute necessity. The newer mega/macro/micro terminology is similar to an earlier macro/micro planning model involving federations and central agencies (Shluker et al. 1989a and b), but allows for the formal inclusion of the schools and other direct service providers into the equation. Better yet, it underscores the role of the school and other service providers as key participants and the synergistic nature of the tripartite relationship, the *chut bameshulash*. It also reinforces the pivotal role of the central agency as the communal expert in Jewish education working with both the

federations, the schools and others, and mediating between them. Central agency macro-planning calls for coordination, supervision, evaluation, funding, and consultation with educational institutions vis-a-vis specific educational matters, on the one hand, and consultation with federation vis-a-vis community-wide planning and priority setting, on the other.

The model of collaborative planning should follow these principles (Shluker et al. 1989*a* and *b*).

- **Planning for Jewish education must be proactive and comprehensive.** Planning should not be confined to issues of financial support, but should focus on how to provide the highest quality Jewish education for the greatest number of individuals. It should incorporate assessment of needs, formulation of goals and objectives, design of strategies for teaching these objectives, assembling of the necessary resources (financial, human, and institutional) to implement these strategies, and evaluation of results.
- **Planning must deal with long-range issues, e.g., looking 3–5 years ahead.** Planning must focus on long-term needs. It should encompass a multi-year perspective and envision and design programs for addressing needs that may not yet but will be acute.
- **Planning must be linked to funding, whether through regular or special sources.** For planning to be effective, there must be a realistic linkage between what is planned and what can and will be funded. The planning process should inform and be informed by the process of funds distribution. Linking planning and funding closely makes it more likely that planful change will in fact take place and will enable Jewish education to compete effectively with other areas of service for resources within the federation.
- **Planning must include both formal and informal education.** Today, Jewish education is understood to be a holistic enter-

prise, embracing a range of contents, methods, and settings. One of the primary aims of community-wide educational planning should be the closer integration and synergistic interaction of formal and informal education across the full spectrum of age groups.

- **The planning process must engage all institutions in the community involved in Jewish education and Jewish continuity.** Congregational and community supplementary schools, day schools, JCCs, synagogues, youth organizations, campus resources, and functional agencies (e.g., family service, vocational service) should all be involved. For planning to be maximally effective, these stakeholders must all be within the frame of vision of those doing educational planning. As many of the stakeholders as feasible should be involved in the planning process itself, both to enhance the quality of the results and to maximize the likelihood of successful implementation. The effectiveness of educational planning depends on maintaining a spirit of collaboration and mutual respect among the many groups involved in and concerned with Jewish education.
- **Top lay leadership of the Jewish community must participate in the planning process.** Planning for Jewish education must be conducted and perceived as a priority activity that engages and involves the community's top leadership. It cannot be relegated to a second tier and expect to enjoy the prestige and support necessary for successful implementation of planning initiatives.

The Concept

Community-wide educational planning responsibilities are divided between the federation and the central agency. Mega-planning and funding are within the domain of the federation; macro-planning, program coordination, and support services to educational institutions are within the domain of the central agency.

The federation is responsible for overall (mega) community-wide planning in Jewish education, as it is in other community service areas. It accepts ultimate responsibility for ensuring that educational needs in the community are identified and met effectively and efficiently. It also establishes, in consultation with the central agency, the basic priorities among different potential arenas of initiative, such as adolescent education, personnel recruitment and training, outreach, and marketing and Israel programs. Finally, the federation is responsible for securing and disbursing the funding needed to support the programs and services that it identifies as meriting and requiring community support. Macro-planning should inform mega-planning.

The central agency is responsible for (macro) educational planning at the operational level within the framework established by the federation. It provides educational expertise and support to the federation in planning deliberations and bears primary responsibility for the design and implementation of programs. It may assume a coordinative and/or supervisory role in the implementation of programs by other institutions and agencies and should be involved consultatively in their planning for Jewish education. The central agency is also responsible for identifying and providing support services needed to implement planning outputs successfully and serves as the federation's resource for educational evaluation. Micro-planning should inform the macro-planning.

The schools and other service providers are responsible for internal (micro) programmatic planning informed by central agency input wherever appropriate. In turn, the mega- and macro-planning should be informed by provider needs.

This model best uses the respective assets and capabilities of federations and central agencies for Jewish education. It clearly locates overall responsibility for direction and priority setting in the federation, which, as the central address for planning and funding in other domains, has the

leadership, prestige, and experience to carry out these roles effectively on a community-wide basis. It allows the central agency, with its educational expertise and day-to-day working relationship with educational institutions, to be involved actively in the specifics of program design, coordination, and evaluation, where its expertise can best be put to use. By ensuring that federation decisions are informed by educational guidance coming from the central agency and that central agency activities are taking place within the framework of a clear mandate from federation, this model should make it easier for both to satisfy the concerns of key constituencies regarding the appropriateness and likely effectiveness of their activities with respect to educational planning.

Application: A Hypothetical Case Study

A federation, responding to information in its demographic study and input from agencies, synagogues, and the community at large, identifies expanding and upgrading educational opportunities for families with young children as a priority area for attention. With advice from the central agency and other agencies, it determines that several areas of initiative should be pursued: (1) synagogues and day schools should be assisted in developing family education programs; (2) a Jewish parenting program should be established at the JCC; and (3) a program of family retreats should be set up. It also agrees to make \$300,000 available over a 3-year-period to implement these initiatives.

The central agency is assigned the responsibility for overseeing and coordinating the implementation of these initiatives. It works with the synagogues and day schools to develop a plan for hiring and training family educators and setting up a process for federation to provide matching grants for family education programs. It assists the JCC in designing the Jewish components of its parenting program. In cooperation with the synagogues, the central agency assumes primary responsibility for organizing and implementing the first two family retreats, one for members of Conservative and one for members of Reform synagogues.

Implementation Tips

Planning in this way—involving all the stakeholders and utilizing all their particular strengths—means that the highest levels of respect, communication, and dialogue must prevail. It calls for the following elements, which are absent all too often from the planning equation in some communities:

At the *relationship* level:

- high levels of communication, i.e., the need for ongoing forums and liaison bodies to keep the channels open
- mutual respect and closer working relationships at both professional and lay levels, i.e., the need to understand respective strengths and weaknesses and to support one another in achieving common goals
- acknowledgement of areas of specialty and expertise, i.e., the need to recognize that there is a great deal of know-how and using it to best advantage
- open exchange of ideas and learning from one another, i.e., the willingness to ask questions and learn from others, no matter how “big” we are

At the *planning* level:

- mutual accountability, i.e., accountability goes in all directions
- clear-cut goals and a collaboratively designed “game plan,” i.e., everybody has to know where they are going and help plan the means to get there
- clear-cut assignment and acceptance of responsibility, i.e., the plan will not work well or at all if everybody does not “buy-in” and/or know what to do
- realistic expectations geared to available human and financial resources, i.e., the plan will not work and nobody can be held accountable if there are not enough resources to get the job done
- spirit of planning “with,” not “for,” i.e., the basic commitment to work as part of a team

CONCLUSION

Interestingly, if we examine more closely the restructuring phenomenon in general education, we see that underlying many of the activities are some basic goals and guiding principles that should inform our own work in Jewish education:

- improving communications and interaction
- promoting shared decision making and better relationships
- allowing for locally designed incremental initiatives based on research
- focusing on long-range impact
- building coalitions of support and new conceptions of accountability
- favoring restructuring approaches that contain a vision of how they will change things, a planning process that demonstrates the involvement and support of all constituencies, a demonstration of the ability to implement the plan, including resources and climate for change, and a description of goals and a detailed action plan

Adoption of these guidelines and of the mega/macro/micro model in the spirit and practice of the “implementation tips” suggested above may result in much greater levels of synergy and stronger relationships among all stakeholders in the enterprise of Jewish education in particular and in the community in general.

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FOR YOUR INFORMATION

For another perspective on the forces that have led to the communal education restructuring conundrum, consult the special Summer 1991 issue of the Journal of Jewish Communal Service on Jewish education and identity. Highlights of that issue include a forum on Jewish family education, as well as articles on informal Jewish education and education throughout the life cycle.

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