JESNA

PLANNING FOR JEWISH CONTINUITY:
A HANDBOOK

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This publication is part of an ongoing collaborative effort between the Department of Community Consultation and Planning and Department of Research and Evaluation at the Jewish Education Service of North America (JESNA), and the Department of Planning and Resource Development at the Council of Jewish Federations (CJF), which have been working together to monitor community initiatives in the area of Jewish continuity and identity, and to help communities move through the various planning and implementation stages.

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FOREWORD

Why and for whom was this planning guide designed?

With leaders across North America deeply concerned about Jewish continuity[1] and the future of the American Jewish community, JESNA=s Department of Community Consultation and Planning and Department of Research, and the Department of Planning and Resource Development at the Council of Jewish Federations, have been working together to monitor these activities, and to help communities move through the various planning and implementation stages.

As part of the monitoring process, two reports providing descriptive information about continental activities have been distributed:

Preliminary Survey on Jewish Continuity Planning: Summary Report

As the number of communities (particularly smaller ones) beginning to undertake Jewish continuity planning has grown, it has become evident that a more comprehensive and directive document was needed. Communities near the beginning of their planning processes are seeking information from others further along on how best to organize and implement a continuity planning process.

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[1] The term *Jewish continuity* is used widely today, but rarely defined rigorously. The meaning of the term as a characterization of our broad goal is relatively clear, if not necessarily specific: we want Jewish life to continue on this continent, vigorously and creatively. However, when we begin to speak of Jewish *continuity* planning, initiatives, or programs, the question of what differentiates such activity from more traditional categories such as Jewish *education* emerges. In our view, there will always be some ambiguity involved, since Jewish education constitutes one of, if not *the*, prime strategies for promoting continuity through building Jewish identity and community.

Our approach in this handbook is to use the term (Jewish) *continuity* operationally to refer to the full range of approaches C educational and other (*e.g.*, social action) C that may be employed to encourage the development and expression of positive Jewish feelings, attachments, and behaviors. The term Jewish *education* will refer to structured, curricularized learning activities and experiences which significantly emphasize the transmission of Jewish content. Ultimately, we believe, there can be no Jewish continuity without serious and effective Jewish education. However, Jewish continuity planning may also include addressing issues that have dimensions that go beyond Jewish education *per se* (*e.g.*, the quality of Jewish family life or Israel-Diaspora relations).

This document is intended to serve as a how-to handbook for such communities, especially smaller ones who may not have specialized staff resources to draw upon. The handbook was designed with these communities in mind, and reflects their unique characteristics. It presents background, a basic framework, working principles, and a general procedure. Though structures in larger communities may differ (*e.g.*, they may have central agencies for Jewish education which must certainly play a significant role), it is expected that any size community just getting started will find this handbook helpful.

What data and experiences inform the principles and guidelines included in this handbook?

The handbook is based on our ongoing, extensive consultation and related work with local communities continent-wide. It reflects our review of continuity materials prepared by local commissions, relevant reports, and the general literature on planning and organizational change. A selected bibliography is included for further reference.

How should this handbook be used?

This handbook is comprised of two parts:

!   The first section (printed on colored paper) lays the foundation for addressing Jewish continuity issues. It provides an overview of various notions of continuity and outlines the major challenges. It also presents basic principles of planning, organizational change and collaboration that should guide communal continuity planning efforts.

!   The second section, *The Planning Guide* (printed on white paper for ease of duplication), outlines a step-by-step procedure informed by the background and principles contained in the first section. For each of the eleven steps outlined, the guide identifies key tasks and suggests possible approaches. Please note: Worksheets are provided to facilitate the process and are designed for convenient reproduction as they appear.

We recommend that readers utilize both sections in tandem, referring to the background sections in conjunction with use of the worksheets.

PLANNING FOR JEWISH CONTINUITY: A HANDBOOK

FEEDBACK SHEET

As part of our ongoing effort to respond to community needs, we need your feedback about the usefulness of this handbook and your requirements for additional resources and materials. Please take a few minutes to complete this feedback form to provide us with information about your experience in using this handbook. Thank you in advance for your time and attention.

1.   Community   _____

2.   Respondent   _____

Agency

Position

3.   Which committee(s) or task force(s) utilized the *Handbook*?

4.   How was the *Handbook* used? (*e.g.,* as a reference volume, as a step-by-step manual, etc. Please be as specific as possible.)

5.   Which parts were the most useful?

6.   What types of additional information or guidence would be desirable?

7.   What are your suggestions for revision or improvement of the *Handbook*?

8.   JESNA plans a series of additional handbooks focused on specific topics that have emerged as important themes in continuity planning (*e.g.*, synagogue-federation relations, funding strategies for Jewish continuity, family education, programs for teens, professional development, lay leadership development, strengthening existing educational settings, evaluation). In what areas do you feel there is a need for additional handbooks?

9.   Additional comments?

Please return this Feedback Form to:
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CONTINUITY PLANNING OVERVIEW: ISSUES AND PRINCIPLES

This overview outlines some of the basic ideas relating to Jewish continuity, frames some of the key issues facing communities, and offers three distinct but inter-related sets of principles for *planning, organizational change* and *collaboration*.

Focus on Continuity

Why the current tumult about *Jewish Continuity*?

Understanding the current situation and the historical dynamics that brought us to this situation:

Results of the *1990 National Jewish Population Study (NJPS)* alerted and alarmed communal leadership across North America. Findings convinced leaders that the continuity of the Jewish community in North America is in jeopardy because of a weakening of Jewish identity.[2]

Where once Jewish identity, commitment and community could be taken for granted (and were often impossible to escape), this is no longer the case. The voluntaristic nature of modern society and the near total acceptance of Jews in American society has made identification, affiliation and commitment to Judaism an optional choice.[3]

What has been the communal response?

Since release of the *NJPS*, there has been a sense of great urgency as many communities have moved quickly to launch programs and initiatives intended to enhance Jewish identity and involvement. Although Jewish institutions alone cannot stem the tide of assimilation, there is near universal agreement that they represent the best means of reaching individual Jews with the message of the benefits and responsibilities of Jewish living. The core mission of congregations and their associated religious and educational institutions, as well as central agencies for Jewish education has long been the promotion of commitment to serious Jewish living. Heightened awareness of the challenges to Jewish continuity has caused them to redouble their efforts and to seek additional means to promote their mission.[4] The Jewish

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[2] *Highlights of the CJF 1990 National Jewish Population Survey* (New York: The Council of Jewish Federations, 1990).

[3] Arnold Eisen in *Strengthening Jewish Identity and Continuity: The Challenge to the North American Jewish Federation System*, a paper presented at a plenary of the 61st CJF General Assembly, New York City, November 10-15, 1992 (New York: Council of Jewish Federations, 1992), pp. 15-23.

[4a] *Jewish Education in the Conservative Movement: Leadership in the Continuity Process* (New York: United Synagogue of Conservative Judaism, 1993).

[4b] *UAHC Strategic Planning Task Force for Jewish Continuity and Growth: Final Report*, David Belin, Chair, Rabbi Paul Menitoff, Director (New York: Union of American Hebrew Congregations, 1993).

Community Centers Association and many JCCs also have made Jewish education a high priority.[5]

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 agendas.[6] 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.

What do people mean when they talk about Jewish continuity?

While there is general agreement about the current formidable challenge to Jewish continuity, there is not nearly the same consensus about what *continuity* means. Some are concerned about continuity in a demographic sense, reflecting a concern about Jewish survival and the number of Jews in future generations. Others are alarmed about the continuity of Jewish cultural and religious life as expressed in the vitality and viability of communal institutions. A synthesis of these concerns is expressed in the following definition:

Jewish continuity is the process through which successive generations of Jews develop and express a connectedness to their fellow Jews, Jewish culture, and a tradition that informs their lifestyles, life choices, and life decisions.

How can Jewish identity be strengthened so that it does become a significant organizing framework for individuals' lives?

In other words, as Jonathan Woocher[7] asks, How can Jews whose Jewishness is intermittently relevant, but not powerfully and consistently so, become Jews whose Jewishness gives shape and structure to their lives? According to Woocher, the three interconnected aspects of the identity building process are:

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[5] *Maximizing Jewish Educational Effectiveness of Jewish Community Centers* (New York: JWB, 1984).

[6] *Strengthening Jewish Identity and Continuity: The Challenge to the North American Federation System. Plenaries and Forums of the 61st CJF General Assembly.* (New York: Council of Jewish Federations, 1992).

[7] Jonathan Woocher, in *Strengthening Jewish Identity and Continuity: The Challenge to the North American Jewish Federation System*, address presented to a forum of the 61st CJF General Assembly, New York City, November 10-15, 1992. (New York: Council of Jewish Federations, 1992), pp.37-39.

Providing access to Jewish experiences. Unless one has Jewish experiences, s/he has nothing to build on. Many Jews grow up with Jewish lives that are impoverished experientially.

Helping people develop a Jewish language for interpreting and connecting these experiences. Just as a pile of stones is not a home, a set of enjoyable happenings unconnected to a larger set of meanings will not succeed in building identity. Jewish learning is the essential framework necessary for making meaning of Jewish experiences. There is no substitute for Jewish text, Jewish history and those elements of cognitive understanding that add richness and vigor to our vocabulary of Jewish life.

Creating and participating in communities of meaning. It is impossible to be fully Jewish as an individual apart from a community. It is also impossible to construct meaning for our lives in isolation from others. Only in community can individuals fully experience their Jewishness. Learning to speak the language of Jewishness gives experiences structure and significance.

How can we pursue Jewish continuity on a community basis and why is continuity planning important?

There are a variety of hypotheses about the best ways to connect individual Jews and to create a strong Jewish community. In his taxonomy of continuity intervention models, Jacob Ukeles[8] has categorized non-identity oriented and identity oriented approaches. Each of these approaches rests on certain assumptions about the kinds of experiences and activities that will both generate individual commitment and carry forward the collective purposes of Jewish existence. It is likely that all of the approaches will, in fact, contribute to Jewish continuity. The question for community planners is how to assign relative weights to each element in an overall continuity strategy, and on this there is no clear consensus.

The non-identity approaches may be summarized as follows:

Tzedaka/Areivut: The best way to insure Jewish continuity is to promote and invest in the ideology of *areivut* the sense that Jews are responsible for one another, and in the related ideal of *tzedakah*. If we can succeed in instilling these values in the next generation, the Jewish community will continue in North America.

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[8] Jacob B. Ukeles, ΑJewish Continuity, Identity, and Education: Contemporary Models of Intervention in the United States, Report to the Conference on National and Cultural Variations in Jewish Identity and Their Implications for Jewish Education, January 4-6, 1993.

Human Services: The key to Jewish continuity is investing in services that meet genuine human needs especially those that support the Jewish family (viewed as the key Jewish institution).

Tikkun Olam: Jewish continuity will be ensured by the systematic commitment of Jews as Jews to the great causes of our day. Jews will remain connected because Judaism has a great deal to say about their concerns and articulates a vision of a perfected world that inspires commitment.

The identity-oriented approaches seek to accentuate:

Religious and spiritual content: Strong connection to the Jewish community, in this view, will occur only through increased religious commitment. The emphasis here is on building a holy community (*kehilla kedosha*) devoted to *mitzvot* and spirituality, and encouraging individual Jews to understand and practice their Jewishness in these terms.

Jewish culture, ethnicity, peoplehood: Because more Jews identify being Jewish as being part of a cultural group, the secular-cultural dimensions of being Jewish (*e.g.,* Jewish intellectuality, literature and the arts) should be stressed.

Jewish education: The best way to insure Jewish continuity is to strengthen individual Jewish identity, and the best way to strengthen Jewish identity is through Jewish education (including informal and formal, cognitive and experiential approaches).

Outreach: Jewish continuity demands that we connect with and draw in Jews outside the community. The focus is on making the connection and being open and inviting, and only secondarily on conveying information or on behavioral change in the individual.

Translated into programmatic terms, this taxonomy would argue that the pursuit of Jewish continuity can and probably should involve a broad array of approaches C some traditional and some non-traditional. Today, communities are undertaking initiatives in a wide range of (often overlapping) programmatic areas under the banner of Jewish continuity. These include:

Q   Jewish family education
Q   early childhood education
Q   strengthening supplementary Jewish education, especially through the congregations
Q   expanding and improving day schools
Q   the *Israel experience* for teenagers
Q   upgrading informal programs for Jewish youth
Q   strengthening Jewish programming on the college campus
Q   programming for single young adults
Q   social action programs to involve those committed to social causes
Q   expanding opportunities for high quality adult Jewish learning
Q   outreach to the marginally affiliated, especially intermarried

Q   professional recruitment and development, especially for educators
Q   lay leadership development and education programs
Q   expanding scholarships for Jewish schools, camps, and Israel programs
Q   grants to individual institutions or institutional partnerships for new or improved
programming in some or all of the above areas

What differentiates communities in their continuity approaches?

Communities differ with respect to:

\#   the specific arenas in which initiatives are being undertaken; and
\#   the extent to which program initiatives are part of a larger *strategic* approach to change.

Some communities have conceptualized their continuity planning largely in terms of generating new programs in specific areas. Sometimes, they have identified target populations they wish to reach, either because they represent populations of special opportunity (*e.g.*, families with young children) or those especially at risk Jewishly (*e.g.*, the intermarried and singles). Some communities have focused their attention on particular institutions (*e.g.*, the synagogue, the supplementary school, the day school, the JCC) which are seen as vital links in the continuity chain. Still other communities have identified critical leverage points for strengthening identity-building, such as the number and quality of educational personnel, and sought to focus attention on upgrading these building blocks as a way of having a broad impact on a wide range of settings.

To some extent, all these various approaches to cutting into the continuity issue represent viable alternatives. What is critical, however, is that the generation of new programs not be seen as the sum and substance of the continuity agenda. New programs should emerge from a thoughtful planning process which asks fundamental questions and which envisions the process of change as an ongoing one. Ultimately, each community must make some strategic assumptions about how it can impact most forcefully on the life-decisions of individual Jews and upon which Jews it will try to impact first. These assumptions, informed by what we know about Jewish identity-building in general, by change theory, by fundamental values, and by local considerations, should guide the continuity process.

Deciding when, where, how, and with whom to seek to intervene is neither simple nor obvious. There is almost surely no one correct decision, but arriving at better, as opposed to poorer decisions requires the kind of planning process that this *Handbook* seeks to facilitate.

In suggesting the key elements of such a process, we make certain assumptions as well. We assume that:

\#   the current state of our knowledge does not permit absolute answers as to what is the best way to promote Jewish continuity.

\#   since resources are always limited, communities (and institutions) will need to select from among a variety of legitimate alternatives in focusing their energies.

\#   the choices among these alternatives should be made on the basis of a variety of factors, some unique to each community. Hence, each community needs its own planning process (*i.e.,* the example of other communities' decisions can be helpful, but not authoritative).

\#   this planning process should look to induce changes that are both broad and deep (in keeping with the breadth and depth of the challenge we face). Hence, it must be undertaken seriously in keeping with the best knowledge we have about how to plan and implement change successfully.

\#   the results of such a planning process are likely to be far-reaching, not only in terms of new programmatic initiatives, but in terms of demanding change both in the behavior and culture of individual institutions and in the way that Jewish institutions work together (a movement toward collaboration).

These assumptions inform the background discussions that follow, as well as the *Continuity Planning Guide* itself. They are also the reason why we eschew the recommendation of specific continuity strategies or programs C these must emerge, we believe, out of a sound indigenous planning process if they are ultimately to be successful.

How does Jewish Education fit into the Jewish Continuity agenda?

There is no dispute that Jewish education is inextricably linked to any notion of Jewish continuity. Regardless of how one understands Jewish *continuity*, be it in terms of Jewish survival, cultural transmission, religious observance, ethnic identification, or any other indicator, Jewish knowledge (obtained through Jewish education) is a fundamental means of achieving this goal. Recent secondary analyses[9] of data from the *National Jewish Population Survey* indicate

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[9a] Sylvia Barack Fishman and Alice Goldstein, *When They Are Grown They Will Not Depart: Jewish Education and the Jewish Behavior of American Adults*, Center for Modern Jewish Studies (CMJS) Research Report 8 (Boston, MA: Maurice and Marilyn Cohen Center for Modern Jewish Studies and Jewish Education Service of North America (JESNA), March 1993).

that there are a constellation of experiences throughout the life span which contribute to the development of Jewish identification and activity, and Jewish education is central. The more intensive the Jewish education of the respondents (in terms of frequency and duration), the stronger their identification and participation in Jewish life. The definition of Jewish *education* has been broadened beyond schooling to include both formal and informal modes and settings of education. This encompasses both traditional and new programs such as day and supplementary schools, family and adult education, congregational and youth group experiences, summer camping and Israel trips, and expanded outreach activities.

However, in most cases when communities talk about Jewish continuity there is also a broader vision. There are images of reconstructing and strengthening the Jewish community so that it commands the loyalty of individual Jews, by reaching broader populations, by creating connections among Jews, and by strengthening institutions and the relationships between them. The term Jewish *continuity* is coming to signify for many the re-invention of a Jewish community in which Jewish learning and action are ongoing and inextricably linked, resulting in a deepening of personal Jewishness and a richer, more vibrant, more cohesive collective life. Jewish *education* (on all levels) is both a basic building block and the cement which consolidates this structure.

What are the over-arching, global continuity planning issues?

The following issues are relevant for all-sized communities as well as continental leadership. Smaller communities may not be able to deal with many of them directly, but discussions about them should inform local continuity planning:[10]

Formulating the vision and goals for a continuity strategy

Are we ready as a continental community and as individual communities for transformational change?

What are we seeking: more Jews? more Jewishness? more Judaism? What do each of these definitions of continuity mean? Are we working with one vision or many?

[9b] Sylvia Barack Fishman and Alice Goldstein, *Teach Your Children When They Are Young: Contemporary Jewish Education in the United States*, Center for Modern Jewish Studies (CMJS) Research Report 10 (Boston, MA: Maurice and Marilyn Cohen Center for Modern Jewish Studies and Jewish Education Service of North America (JESNA), December 1993).

[10] Adapted from materials developed by Jonathan Woocher.

Choosing target populations

Q   How do we hit moving targets recognizing the diversity and fluidity of Jewish identity?

Q   Who gets how much attention? Do we do inreach, outreach or both? How do we balance and allocate the resources? Is triage inevitable?

Q   How do we talk (and listen) to those outside the system? Do we know what to do and say when we do reach them?

Creating growth paths

Q   Can we articulate and implement a normative model of Jewish growth designed to maximize the cumulative impact of Jewish education and experiences throughout a person=s lifetime?

Q   How do we identify what works at each stage, and maximize the number of Jews who have access to these experiences?

Building institutional capacities

Q   How do we prepare communities, institutions, and individuals for change?

        Q   How do we make all of our institutions more capable as settings and vehicles for building Jewish identity?

Building a community coalition: working with the congregations

Q   How do we bridge the different cultures of federation and synagogue to build a true community-wide coalition for Jewish continuity?

Q   How do we create collaborative partnerships and synergies among programs and institutions?

Q   Can we talk? the challenge of developing a shared language

Q   Can we deal? the challenge of mediating differing goals and expectations

Addressing the planning/funding connection: linking programs and resources

Q   Who drives the continuity agenda -- institutions or funders?

Q   How do we pay for it all?
Q   Can we really prioritize, and who sets the priorities?

Q   How do we market it all? (If we build it, will they come?)

Promoting effectiveness and accountability

Q   How do we define success, and how do we measure it?

Q   How do we choose the best strategies? (what really works? what do we know, and what do we only *think* we know? what do we need to know, and can we know it?)

Q   Who is ultimately responsible for ensuring the work gets done C for planning? research? implementation? funding? evaluation?

What are the unique aspects of smaller communities that impact on their ability to address Jewish continuity issues and challenges in a comprehensive manner?

Continuity planning in smaller communities must take into account their:

demographic situation (*i.e.*, the impact of both community size and characteristics, the institutional infrastructure available, as well as proximity to other communities, particularly those with continuity resources etc.);

growth status (*i.e.,* the impact of an expanding, contracting, or level population);

communal dynamics and relationships (*i.e.,* the impact of personal and institutional roles and other factors which may foster or inhibit planning);

institutional commitment and capabilities (*i.e.,* how intensely Jewish institutions are focused on the continuity agenda and how capable are they of responding effectively);

financial resources;

human resources (*i.e.,* the availability of professional staff to address continuity issues);

ability to manage a full-scale planning process (due to resources and the other factors listed above).

In light of these factors, how should smaller communities generally proceed in their continuity planning activities?

Smaller communities need to carefully review the broad range of needs, possible planning approaches, and potential programs in light of their unique resources. For some, this may mean a more scaled-down planning process and a more modest expansion of current, or initiation of

new, programs. Nevertheless, some type of formal planning should take place and program reviews initiated. Consequently, while this handbook provides a comprehensive overview of approaches and possible options, there is a full recognition that many smaller communities will only be able to do some of the things suggested.

Planning Principles

What are the planning approaches relevant to continuity planning?

Planning embraces different types of activities, all of which are essential to communal and institutional effectiveness. Planning for Jewish continuity involves both:

\#   ***program*** (non-transformational) ***planning*** (both short and long-term) which seeks to address needs, goals and program effectiveness within a relatively stable situation with respect to the communal/institutional environment, constituency and mission;

      \#   ***strategic*** (and potentially transformational) ***planning*** (long-term) which seeks to respond to new circumstances, and which frequently *transforms* program directions based on a changed or modified mission in response to changing conditions.

To be maximally effective, Jewish continuity planning should have a *strategic* dimension, which should in turn inform ongoing *program* planning in a number of settings.

What is meant by strategic planning being a transformational process?

The value of *strategic planning* (once called *long-range* to describe a three to five year time-frame) in enhancing the efficiency and effectiveness of organizations by helping them to solve presently recognized problems and to avoid future difficulties is widely acknowledged. But the real power of planning is not merely to allow organizations to prepare themselves for how the future will affect them, but also to allow them to shape their own futures.

The typical program planning process begins with the assumption that the characteristics and goals of the institution and/or community will remain relatively stable during the planning period, and therefore focuses on finding more effective ways to reach those relatively unchanging ends. But that assumption of stability is difficult to support in our rapidly changing world, and may even be antithetical in the context of continuity planning. When there has been significant change in an organization or community (due to such factors as demographic or geographic shifts, emerging service needs or contemporary challenges, ideological reorientation, organizational and/or financial changes) *strategic planning* becomes a necessity.

Strategic planning begins with an examination of the external environment (*environmental scan*) and, using that information, reexamines the basic role of the organization in the context of what is happening in the larger society. Rather than eliminating the need for traditional planning activities, the strategic planning process provides the framework to guide other planning, decision-making and management by obliging people and institutions to reexamine their mission, refocus their goals and objectives, seek out or create new means for accomplishing their purposes, and devise systems to evaluate their progress. In doing so, it strives to eliminate discrepancies between what is and what should be.

What are the basic steps applying to all types of planning?[11]

While there is no universal formula which dictates precisely how each community should do its planning, there are a number of proven steps which should be carried out in systematic manner by all stakeholders. *Program planning* would apply these steps to existing programs; *strategic planning* would apply them to the broader needs, mission, and then new or modified programs.

\#   needs assessment (where we are and where we want to go);

\#   goal setting (defining an overall direction) and determination of objectives (selecting specific desired outcomes which are more or less measurable), leading to the establishment of priorities (choosing among objectives, based on criteria of need, value, and feasibility) for action;

\#   resource acquisition;

\#   staff preparation (communal, institutional, and organizational);

\#   implementation of programs based on objectives;

\#   evaluation.

Where does continuity planning fit in to the planning scheme?

Continuity planning is initially a *strategic planning* initiative which should include provisions and mechanisms for doing annual program evaluation. Continuity planning may necessitate a transformation in program priorities, financial (and human) resources allocation, and planning

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[11] The **Planning Guide** found in the second section of this handbook provides a step-by-step application of these steps to planning for continuity.

structures and mechanisms C in some smaller communities the latter may only mean, at least initially, the creation of a standing federation continuity committee, and a more systematic planning process.

What are some of the basic principles of planning?

Continuity Planning Principles *(Adapted from TRENDS #15)*

- **Planning for Jewish continuity is complex and requires proper planning attitudes and effective planning activities. It must be comprehensive and focus on providing the highest quality services for the greatest number of individuals.** Since federations cannot fund everything, difficult priority-setting and allocation decisions have to be made. Communities must give more attention to planning for Jewish continuity in general. They must also exhibit a greater commitment and a more concerted effort to conduct planning activities more systematically, comprehensively and in a collaborative way.

- **Planning should be both operational and strategic and deal with both short- and long-range issues.**

- **Planning needs to be done at various levels; the overall communal or global level, the programmatic level, and the direct-service, or institutional level.**

- **Planning must be linked to funding** (whether through regular or special sources). The planning process should inform and be informed by the process of funds distribution. This involves a commitment to find or redirect the financial resources necessary to implement what has been planning. The current continuity crisis and massive educational needs mandate that communities increase allocations to the continuity effort on all fronts.

- **Top communal leadership must participate in the planning process.** Planning for continuity must be conducted and perceived as a priority activity which engages and involves the community's top leadership. It cannot be relegated to a second tier of leaders and expect to enjoy the prestige and support necessary for successful implementation of planning initiatives. The commitment to involve top leadership may necessitate a process of educating that leadership, both about the importance of their involvement and the substantive issues to be addressed. Having at least some of those involved with planning also involved in the allocations process will likely result in stronger and better informed advocacy on behalf of Jewish continuity within the overall priority-setting process in federations.

- **Since each community is uniqueanning must be individualized.** The overall planning process should be geared to promote commitment to accountability and continual self-improvement. Policies and strategies should be based on identified community goals and resources, and include procedures to monitor their effectiveness. The planning structure should have the authority to develop and implement linkages between the quality of programs and the resources made available to support them.

- **The success of communal continuity efforts is contingent on achieving high levels of communication and collaboration among institutions and leaders.**

- **All key stakeholders must be involved in the planning and implementation process** with congregations and their leadership participating as critical components of the communal equation. Consequently, federation should make special efforts to intensify interaction and build a firm partnership with the congregations and denominational movements. All planning activities convened by the federation should involve the early participation of rabbis, continuity directors and lay leadership from the congregations.

- With respect to planning components and structure, **Jewish continuity planning should be designed as a multi-tiered process at three levels**, the:
    - *mega level* which positions Jewish continuity on the overall communal agenda, sets global priorities, secures resources for programs, and determines implementation responsibilities. This role is most appropriate for a federation-convened planning committee;
    - *macro level* which deals with the implementation and coordination of programs on a community-wide basis. This role is most appropriate for a functional body (staffed by a Jewish educator or continuity specialist) with a mandate to work closely with the local congregations and educational institutions;
    - *micro level* which involves the planning and implementation of programs within specific institutions and direct-service entities.

- **While all *continuity programs or services* should not and cannot be provided by a central community-wide body, *overall management and coordination of the communal continuity plan* should be.**

- **Federations should play a variety of facilitative roles:**
    - advocate for primacy of Jewish continuity;
    - help assess and plan for Jewish continuity;
    - foster inter-agency communication, collaboration and cooperation;
    - increase opportunities for lay and professional interaction.

- **In sum, planning should be:**
    - **pro-active and comprehensive**;
    - **deal with short- and long-range issues** (*e.g.*, looking 3-5 years ahead);
    - **linked to funding** (whether through regular or special sources);
    - **involve top lay leadership**;
    - **include both formal and informal education**;
    - **engage all institutions in the community involved in Jewish continuity and continuity**.

NOTE: This particular presentation of how the three-tier system works is intended for small communities without a communal body for Jewish education. The approach would be implemented somewhat differently in intermediate and larger communities where functional communal bodies for Jewish education (usually) exist and would be prime candidates to play the lead role in macro-planning and to share responsibility with the federation for managing the mega-planning process.

<div align="center">Strategic Planning Principles (Adapted from Bryan)</div>

The Nature of Strategic Planning

Strategic planning helps an organization define the key issues affecting its future and determine how to deal with them. It encourages an organization to reposition and reorient itself so that it can take on new tasks and relate to its environment in new and more productive ways.

Strategic planning goes beyond a mechanistic series of planning procedures. Its power is in its capacity to create dissonance in people, upset old views, identify new possibilities, and pose new questions. In this sense, strategic planning is:

- o a management process for changing and transforming organizations;
- o a management philosophy;
- o a way of thinking about and solving problems;
- o an organizational development experience; and
- o a community continuity and involvement process.

At the heart of the process is the potential for organizational transformation, if necessary, which may shift basic assumptions and reorganize views of the environment, organizational goals, and patterns of behavior. Strategic planning often has a strong psychological effect on an organization and the people involved with it.

- Goals of Strategic Planning

  The strategic planning process is intended to accomplish one or more of the following objectives:

  - o improve performance;
  - o stimulate forward thinking and clarify future direction;
  - o solve major problems;
  - o survive C even flourish C with less; and
  - o build teamwork and expertise.

- Strategic Planning Steps

  Strategic planning is a rational process to move an organization through:

  - o understanding the external forces or changes relevant to it;
  - o assessing its organizational capacity;
  - o developing a vision (mission) of its preferred future as well as a strategic direction to follow to achieve that mission;
  - o developing goals and plans to move it from where it is to where it wants to be;
  - o implementing the plans it has developed; and,
  - o reviewing progress, solving problems, and renewing plans.

Developing a Strategic Plan

A design (or plan) must be developed which consists of the following steps:

- getting organized:

    o decide whether to develop a strategic plan
    o get commitment
    o determine if outside help is needed
    o outline a planning process that fits
    o form a planning team;

- taking stock (do a situation analysis of):

    o history and present situation
    o mission
    o opportunities and threats
    o strengths and weaknesses
    o critical issues for the future;

- developing a strategy:

    o identify and evaluate planning alternatives
    o select a planning approach;

- drafting and refining the plan:

    o agree on a format
    o develop a first draft
    o define the plan
    o adopt the plan;

- implementing the plan:

    o implement the plan
    o monitor performance
    o take corrective action
    o update the plan.

What is the connection between continuity planning and communal/institutional change?

The *National Jewish Population Study* provides a compelling argument for communal/institutional change. It is self-evident from the findings that the Jewish community and its institutions cannot continue with *business as usual* if they are to meet successfully the challenges of Jewish continuity. Communities must create a vision of the Jewish community they want for the future, identify ways to move toward that vision (including strengthening existing efforts as well as finding new and innovative means), and mobilize resources (human and financial) to make their vision a reality.

What must be considered when planning and implementing change in a community and/or institution?

Change is difficult. No matter how unsatisfactory the current situation, change is unsettling, time and labor intensive, and resource hungry. On the other hand, with appropriate planning and involvement, planning and change can energize and revitalize a community or institution.

Understanding of the change process (both educational and organizational) is crucial to producing effective change and improving the system. There is much that Jewish communities can learn from general research about how to effect and sustain change.[12] The literature on change indicates that among the basic items to consider when planning and implementing change are:

\#   *Context/Community Culture*: the existing internal factors (such as level of concern and awareness, openness to change, or demographic changes) and external influences (such as a generalized *zeitgeist*, or what has caught on elsewhere and is therefore a hot topic) which may inhibit or facilitate change;

\#   *Systemic Nature of the Community*: the complex interrelationships between institutions and sub-groups within the community which need to be considered in implementing change, and how changes in one part of a community system may affect the dynamics of others;

\#   *Level of Readiness*: the extent to which the community is primed to embark on a significant change initiative; the existence of facilitating factors including a visionary idea champion, serious support for the concept and for ongoing efforts to change among lay and professional leaders, and good reason to believe that human and financial resources will be available or can be marshaled to sustain the planning process and ensuing implementation;

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[12] Adapted from address by Susan Shevitz to the AVI CHAI Conference on Creating an Environment That Transforms Jewish Lives, January 30 - February 1, 1994, Los Angeles, CA.

\#   *Identification of Stakeholders*: because management of change proceeds best when carried out by a broad-based group, a clear understanding of who should be involved in the planning process and who should be consulted;

\#   *Legitimacy*: empowerment of the planning group by the community, along with delineation of its mandate (including the kinds of decisions it can make, what it can spend, etc.).

What basic change principles should inform the planning process?

Overview of Change Principles *(Adapted from Fullan & Miles)*

\#   Planning should be designed to encourage a greater capacity for innovation. Knowledge of the change process is needed to produce effective change and improve the system.

\#   Serious continuity reform is contingent on leaders and other participants knowing how successful change takes place.

\#   A potential obstacle for continuity planning is that the solutions are not easy C or even known C since developing Jewish identity is related to the interaction of many factors. Thinking in terms of "solving a problem" or "dealing with a crisis" may even be counterproductive. Rather, we should see ourselves as seeking to alter our responses to a complex historical situation in order to change aspects of that situation over the long term.

\#   Planning for continuity is a political process. Nevertheless, the initiative will fail if political factors lead to favoring symbols over substance.

\#   Planning efforts will fail when attempts to solve problems are superficial. Superficial solutions, introduced quickly in an atmosphere of crisis normally make matters worse.

\#   Changes in structure are especially susceptible to superficiality because they can be launched through political or administrative mandates. The illusion of rapid or fundamental change is created, but underlying realities may be unaffected.

\#   The key to solving difficult problems appears to be a clear, shared vision of where the process is heading.

\#   Change is resource-hungry. Developing solutions to complex problems, learning new skills, and arriving at new insights must all be carried out in a setting already overloaded by demands.

\#   Change initiatives do not run themselves. They require substantial effort to such tasks as monitoring implementation, keeping every one informed of progress, linking multiple change projects, locating unsolved problems, and taking clear coping action to deal with blockages.

\#   Change is best managed by a broad-based group. Such a group needs legitimacy (*i.e.*, an explicit contract articulating what kinds of decisions it can make and what money it can spend). High levels of

cooperation are also required. Everyone must learn to take the initiative instead of complaining, to trust colleagues, to live with ambiguity, and to face the fact that shared decisions mean conflict.

Fundamental change is systemic. Reform must focus on the development and interrelationships of all the main components of the system simultaneously. Further, reform must focus not just on structure, policy, and regulations but on deeper issues of the culture of the system. Ideas, values, assumptions, emotional loyalties, standard operating procedures, key symbols, patterns of resource allocation and usage, utilization of time, distribution of information, patterns of communication, authority relationships C all these must be addressed if fundamental change is to take place.

What is meant by collaboration?[13]

\# *Collaboration* is a mutually beneficial and well-defined relationship entered into by two or more organizations to achieve common goals. The relationship includes: commitment to mutual relationships and goals; jointly developed structure and shared responsibility; mutual authority and accountability for success; and sharing of resources and rewards.

\# In everyday usage cooperation, coordination and collaboration are often interchanged, but there are significant differences.

Q *Cooperation* lacks a commonly defined mission, structure or planning effort. Information is shared but authority, resources and rewards are separate.

Q *Coordination* represents a more formal relationship with compatible missions, some planning and sharing of roles, and increased communications. Authority is still separate, but there is increased risk with shared resources and mutually acknowledged rewards.

Q *Collaboration* connotes a more durable and pervasive relationship which brings previously separated organizations into a new structure with a full commitment to a common mission. Such relationships require comprehensive planning and well-defined communication channels operating on many levels. Authority is determined by the collaborative structure. Risk is much greater because each member contributes its own resources and reputation. Resources are pooled or jointly secured and the products are shared.

Why is inter-institutional collaboration so important to the continuity agenda?

One of hallmarks of the emergence of the Jewish continuity agenda as a focal point of communal concern is the stimulus it has provided for building new institutional relationships. There is a

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[13] Adapted from *Collaboration: What Makes It Work?* (St. Paul, MN: Amherst H. Wilder Foundation, 1993).

growing recognition that planning effectively for Jewish continuity will demand that existing relationships, especially between the institutions of the federated system and the religious movements, be not only expanded, but qualitatively transformed.

Given the complexities of the Jewish continuity agenda and the need to harness fully and efficiently the talents and resources of a broad array of institutions in order to develop comprehensive, long-term identity-building initiatives, achieving genuine *collaboration* among institutions looms as an increasingly important objective. Collaboration will not replace either individual institutional initiatives or other types of cooperative and coordinative relationships. But, it is difficult to imagine that without collaboration, the Jewish community can mount either the density or quality of programs that will be required to transform the lives of large numbers of individual Jews.

Collaboration working together rather than alone is interesting an increasing number of people in human services, government, and community organizations in general because of the benefits it offers:

\#   providing cost efficiencies when addressing common issues and delivering similar services together;

\#   reducing individual expenses in planning, training, research, and other development activities;

\#   sharing overhead costs and avoiding duplication;

\#   making services more accessible;

\#   providing more effective and efficient services in dealing with complex, multi-faceted problems;

\#   achieving certain goals attainable only through jointly provided services;

\#   providing services based on the total need of clients through an integrated system;

\#   increased quality of results since organizations working jointly are likely to do a broader, more comprehensive analysis of issues and opportunities.

In sum, collaboration results in easier, faster, and more coherent access to services and programs. Working together provides real efficiencies, although it is not a substitute for adequate funding of individual institutions. The real importance of collaboration, however, lies in the fact that the synergistic efforts of the partners can help to create a whole which is more than the sum of its parts. Collaboration frequently unleashes creative energies that can find new ways of dealing with intractable problems that individual institutions may not even have been able to conceive, much less implement.

Hence, it becomes vital that in their efforts to promote Jewish continuity institutions take seriously both the potential and the challenges involved in moving from isolated action, coordination, and even cooperation to genuinely collaborative modes of interaction.

What are the ingredients for successful collaboration?
Overview of Collaboration Principles *(Adapted from Mattessich and Monsey)*

Environmental factors necessary for successful collaboration include:

a **history of or climate for cooperation** in the community which offers potential partners an understanding of the requisite roles and expectations and enables them to trust the process and one another. When planning a collaborative project, goals should be set according to the level of development, understanding and acceptance of collaboration in the community. In many instances, cooperative or coordinated initiatives should be the first step. Existing coalitions should be built upon. Furthermore, collaboration among organizations which perceive themselves as competing with one another to achieve their current goals may not be possible. In such instances, cooperation and/or coordination as the first steps in relationship-building may be more feasible.

a context in which the **body (or bodies) seeking to promote collaboration** in order to make system-wide changes **is perceived as a legitimate leader** by the community it intends to influence. The early stage of a collaborative, or lesser-type initiative, should include an assessment of the body's image, and where deficient, first steps should focus on correcting the image.

a **favorable political/social climate** in that political leaders, opinion-makers, resources providers, and the general constituency support (or do not oppose) the mission of the advocates of collaboration. Partners need to:

spend time *up front* selling the collaboration project to key leaders;

consider strategies and tactics for improving the climate and changing and enhancing public attitudes;

limit goals to meet political and social requirements;

publicize that goals are cost-effective and not in conflict with ongoing community endeavors;

regularly monitor the political and social climate and take appropriate action in response to change.

Membership factors necessary for successful collaboration include:

**mutual respect, understanding, and trust** among the respective organizations regarding how they operate, their norms, values, limitations and expectations. Partners must:

initially, set aside the purpose of collaboration and devote time to learning about one another;

present their intentions and agenda openly and honestly;

recognize that building relationships takes time;

set aside time to understand cultural contexts and differing use of language;

acknowledge that conflict is not all bad and that in some areas there may be diverse approaches

and even disagreement.

an appropriate **cross-section of members from each segment of the community is involved** in planning and carrying out the collaborative initiative. Partners need to:

carefully review who should participate and how (*i.e.*, directly or indirectly);

continuously monitor whether new individuals or groups should be included with a formal orientation/integration plan provided, while at the same time ensuring that the membership does not become too large to manage.

an environment in which **partners see the collaboration as being in their self-interest,** offsetting such things as loss of autonomy and turf considerations. Community leaders need to:

build in incentives for organizations to get involved *and* stay involved;

market the benefits of collaboration so that they remain visible throughout the life of the project.

an **ability to compromise** exists since the many decisions made cannot possibly conform to the preferences of all. Rigid rules and expectations will inhibit and/or impede collaboration. Participating organizations may have to :

give their representatives latitude in working out agreements;

allow time and more time for each participant to act deliberately and patiently, within each partner's decision-making framework and process, to reach agreement;

use great wisdom in deciding when to yield and/or compromise and when to wrestle more aggressively when dealing with basic principles that may differ.

Process or structural factors necessary for successful collaboration include:

partners who share a stake in both the process and outcome and feel a sense of ownership over how they function and what they achieve. Partners need to:

devote adequate time and resources;

insure that the operating principles promote a collaborative feeling;

continuously monitor and promote the notion of joint ownership;

create interagency groups to conduct activities and monitor the ownership factor.

multiple layers of decision-making, including lay and professional at various levels. Participating organizations need to:

create mechanisms to involve all layers of leadership;

insure staff participation with priority given to the most capable and most committed to

collaboration.

**flexibility** regarding varied ways of organizing and carrying out the work. Partners need to be:

amenable to changes both in how they structure their various groups and the methods they use;

continuously monitor the flexibility factor.

**clear roles and policy guidelines** are developed regarding roles, rights and responsibilities. *cont.*

Partners need to:

openly discuss role issues, reach agreement on them, and communicate these understandings to all concerned parties. Written minutes and/or protocols may be helpful;

design lay and staff assignments, wherever possible, to match relative strengths and interests;

resolve and/or reduce any conflicts placed on individuals arising from dual roles as participants for individual organizations and in collaborative team activities.

**adaptability** regarding the potential need to change major goals, members, etc., to deal with changing conditions. Partners need to:

keep abreast of community trends and changes in the environment;

review and revise the vision and goals as appropriate.

Communication factors include:

**open and frequent communication** among members to provide updates, discuss issues, and convey necessary information to one another and to others. Partners need to:

establish a system of communication at the beginning and identify the responsibilities of each participant for maintaining and utilizing this system;

assign the communications portfolio to particular staff member(s);

provide incentives within and among organizations to encourage effective communications;

develop effective communications strategies suited to the prevailing (and often diverse) communications styles among the group;

agree to communicate success as well as problems;

avoid selective transmittal/distribution of oral/written communications, especially relating to problematic matters.

**existence of both formal and informal communications links.** Partners need to:

maintain stable membership and encourage regularly scheduled joint meetings, training sessions and work groups;

get to know one another C set aside time for social interaction at both the individual and group levels;

review communications systems and procedures regularly.

Purpose factors necessary for successful collaboration include:

clear and attainable goals and objectives. Partners need to:

formulate clear goals at the outset and then periodically report on progress;

develop both short- and long-term goals;

address the goal-setting process very carefully: groups must experience a progression of successes in order to be sustained. Therefore defining success too narrowly (*i.e.,* only by counting success in the achievement of the ultimate goals) should be avoided. Goals lacking clarity or attainability will diminish enthusiasm. Clear step-stone, achievable goals will heighten enthusiasm.

existence of **a shared vision** either at the outset or along the way. Partners need to:

develop a shared vision and language early-on in the process, sometimes using an outside facilitator;

address openly any imbalances of power and deal with them in a mutually acceptable manner.

existence of **a unique mission and purpose** which differs, at least in part, from the mission of the collaborating organizations. The partners need to:

create a special sphere of activity which the collaborating group views as its domain;

share the nature of the special mission with all involved and others.

Resource factors necessary for successful collaboration include:

sufficient funds (currently existing or able to be acquired) to support the process and emerging plans. Partners need to view this as a top priority. The start-up stage in particular may require substantial funds.

a skilled facilitating agent or convener to address organizational and interpersonal matters, and to provide equitable treatment for all partners in a manner which grants respect and legitimacy to the facilitator's role and the process, and to maintain a balance between process and task activities that enables all participants to keep their roles within the group.

local leadership prepared to give serious attention, care and time to their role, with the process of grooming of new and future leaders well-thought-out and planned for.

CONTINUITY PLANNING GUIDE

This Continuity Planning Guide outlines a process for implementing the principles and guidelines described in the first sections of this handbook. Having read that background material, community leaders may use the following materials to guide each step in the continuity planning process. For each of the eleven steps outlined, the guide identifies key tasks and suggests possible approaches. Although the following is one possible sequence, communities may decide to re-order certain steps (*e.g.*, choosing a planning strategy early on and using that as an organizing framework for the environmental scan).

Please note: In most cases, worksheets are provided to facilitate the process and are designed for convenient reproduction as they appear.

JESNA

1. Initiating the Process

Getting Started

Significant ground work is needed to prepare for any planning effort. In the case of Jewish continuity, community leaders must decide whether an ambitious planning effort is desirable or feasible. If they decide to move forward with the process, they must establish a receptive climate within the community to increase the likelihood of success. To spearhead the effort, a select group of professional and communal leaders should begin by:

　　assessing readiness to initiate and sustain change

　　creating a receptive climate for planning for Jewish continuity.

Assessing Readiness to Initiate and Sustain Change

Before introducing a planning process which will likely lead to change (whether in distribution of communal resources, inter-agency dynamics, approaches to education, etc.), it is important to assess the readiness of the community to initiate and sustain change.   Once this has been done, it must also be recognized that meaningful change is usually multi-faceted, covering services, resource development and community organization itself C not just parts or one of the elements.

A small select group of lay and professional communal leaders should serve as the steering group for the proposed planning process. They should begin assessing the need and feasibility for a continuity planning process by discussing the potential benefits to the community that might be expected from the effort, as well as any drawbacks. They should identify factors likely to advance or impede the process and ways to capitalize on communal assets and to minimize obstacles.

Worksheet 1 may be used by a select steering committee comprised of key professional and lay leaders to assess readiness to initiate and sustain change through a continuity planning effort.

Worksheet 1

Assessing Readiness to Initiate and Sustain Change

By using the questions on this worksheet as a springboard for discussion, assess the pros and cons of beginning a continuity planning initiative at this time. Identify the factors likely to facilitate and impede the process. If initiating a planning process is considered beneficial and generally feasible, determine the things that need to be done before initiating the process in order to maximize success (readiness enablers). If there are areas in which readiness factors are not yet in place in the community, think about ways to prepare the community through leadership development, outside consultation, or other readiness enablers.

Readiness Factors	Community Readiness	Readiness Enablers
Need for continuity planning: What are the potential *benefits* to the community that might be expected from the effort? What are potential *drawbacks* to the community that might be expected from the effort?		
Potential leadership: What evidence is there that there is serious support among key lay and professional *leaders* for both the concept of addressing the challenge of continuity and for the necessary ongoing effort? Who is the visionary idea champion who will not only serve as the visible advocate for the effort, but will also keep it on track and progressing?		
Community culture: How much interest, energy and support is there for the notion of planning for Jewish continuity?		

Readiness Factors	Community Readiness	Readiness Enablers
How strong is communal commitment to: planning and development? the importance of Jewish living and learning? building and strengthening community? inter-organizational cooperation and collaboration?		
Resource Availability: Is there good reason to believe that human and financial resources will be available or can be marshalled to sustain the planning process and ensuing implementation? How experienced are professional and lay leadership in the areas of planning and community organization? Will it be necessary to involve outside consultants? in what areas? Is there commitment to allocating or raising the necessary funds to implement the plan, once developed?		

Creating a Communal Climate for Planning for Jewish Continuity

No strategic planning project should be undertaken without first establishing a receptive climate. By nature, organizational structures are resistant to planning (and the change it often brings). It threatens the *status quo*, challenges personal security and demands involvement and effort.

To overcome this natural resistance, it is very important to share the intent and design of the project as well as details of the process with leaders of all stakeholder groups, and to enlist them as the project's advocates. Special emphasis should be given to the fact that the process potentially will involve or touch anyone and everyone in the community, and that the process will contain inherent safeguards against special interest dominance, political manipulation and basic ignorance.

Intensive efforts to inform the community at large must also be made. These may include articles placed in existing newsletters, presentations at regular meetings, or a series of special meetings, forums or mailings. Eventually, the process will involve and affect all constituencies, so general community awareness and support is invaluable. Furthermore, communities that have mounted such systematic projects report that they tend to energize the community if members are informed and engaged.

Worksheet 2 provides a framework for identifying the groups and individuals that will be affected by the continuity planning efforts, and who therefore should be informed about the planning process and its progress. In addition, it should be used to plan ways to arouse their interest and keep them informed.

Worksheet 2 - Creating a Communal Climate for Planning for Jewish Continuity

Use this worksheet to help identify the groups and individuals that will be affected by the continuity planning efforts, and who therefore should be informed about the planning process and its progress. In addition, it should be used to plan ways to arouse their interest and keep them informed.

	Stakeholders to be Enlisted	Information Efforts
Leaders		
General Community		

JESNA

2. Organizing the Planning Effort

Planning the Planning Process

Successful planning processes are themselves guided by well-devised plans. Efficient and effective planning requires:

!   *developing a mission statement* to express clear understanding of what is to be achieved by means of the planning process.

!   *planning how the process will progress* including:

"   *identifying the individuals and institutions to be involved (stakeholders)* in order to reach the goals, and clarification of the roles of each;

"   *itemizing what the planning group needs to know regarding* the technology of planning, community demography and culture, major issues confronting the Jewish community and *determining how the necessary background information will be acquired* [*e.g.*, organizational expertise or outside facilitator, forms of data collection presentations and consultations (CJF, JESNA, etc.), background papers and readings].

Resolving the decision-making process

"   agreeing who is empowered to make recommendations;

"   agreeing who is empowered to make decisions.

Developing a Mission Statement for Planning

As with any strategic long-range planning effort, continuity planning should begin with development of a mission statement for the planning process itself, clearly expressing the issue(s) to be addressed, the goals of the planning process, and how the planning group will go about achieving them.

In the case of planning for Jewish continuity, it is particularly important to define the scope of the endeavor. For example, is the focus limited to Jewish education services or is there a broader agenda of reconstructing and strengthening the Jewish community by fostering identification and loyalty, and by strengthening institutions and the relationships between them?

The mission statement should include:

!   one or two statements about the issue(s) addressed by the continuity planning effort;
!   a brief statement about the purpose of the planning group;
!   a clear articulation of the planning group's primary goal;,
!   a brief description of how the planning group will accomplish its goals; and
!   an indication of the relationship between the planning group and communal institutions, agencies and organizations.

A sample mission statement is provided on page 38. Worksheet 3 (p. 39) provides a framework for developing a mission statement.

Example of a Continuity Commission Mission Statement

The Commission on Jewish Continuity
Boston, MA
Mission Statement

Boston's Jewish community, like our sister communities in North America, is faced with great demographic and cultural changes which are affecting the transmission of Jewish identity and continuity. We are also a Jewish community with unique strengths and resources which we can bring to bear on the challenges these changes pose.

The Commission on Jewish Continuity will bring together concerned lay and professional leadership from all sectors of our community, to address the challenges and forge a vital communal response to them.

The Commission's primary goals will be:

1.   to identify a set of workable strategies for strengthening Jewish identity and supporting Jewish continuity, and to set priorities among them;

2.   to identify the communal institutions which can implement the agreed-upon strategies, outline appropriate areas of responsibility, and ensure collaboration and coordination in the service of common goals;

3.   to engage the energies and commitment, both human and financial, of the significant stakeholders in and potential funders for an expanded vision of Jewish education in the service of Jewish continuity in our community;

4.   to establish mechanisms to provide for implementation and evaluation of the agreed upon strategies and programs.

In order to accomplish these goals, the Commission will:

1.   create a forum through which a broad based group of influential and concerned community leaders can become conversant with the concepts and issues regarding Jewish continuity and Jewish education in our community;

2.   enable this group's members, and through them the constituencies from which they come, to bring their own thoughts, ideas and vision to bear on existing programs and the development of improved programs and structures;

3.   raise the level of consciousness, promote community dialogue and serve as an advocate for programs and structures that promote Jewish continuity.

The Commission will work closely with and through the leadership of all of the community's institutions which are involved with Jewish education C including the Bureau of Jewish Education, Hebrew College, Hillel Council, the JCC of Greater Boston, JF&CS, the Council of Orthodox Synagogues, the Union of American Hebrew Congregations, the United Synagogue, the Synagogue Council, the congregations, day schools, and academic institutions, and all other groups concerned with strengthening Jewish continuity.

Worksheet 3 - Developing a Mission Statement

Use this worksheet as a framework for developing a mission statement for the planning group.

1.   What are the issue(s) to be addressed by the continuity planning effort?

2.   What is the purpose of the planning group?

3.   What are the primary goals of the planning group?

4.   How will the planning group accomplish its goals?

5.   What is the relationship between the planning group and communal institutions, agencies and organizations?

Identifying the Individuals and Institutions to be Involved: Appointing a Planning Committee or Task Force

Collaboration between all segments of the community (*e.g.*, lay leaders and professionals, federation and congregations, agencies, JCC, etc.) has been identified as a key ingredient that will enhance the prospects for successful change. This is especially true if one of the goals of the planning process is to create community and to strengthen institutions and the relationships between them. The people who are most concerned must not only buy into the process, but also guide and determine its course. They will thus be in a position to represent the needs of their constituencies as well as to promote their support and participation. A number of communities have adopted the term wall-to-wall coalition to aptly describe the inclusiveness of their planning groups.

Since the planning committee is a keystone of the process, its composition and membership should be deliberately designed to facilitate and reflect the nature of the process. Criteria for selection to the planning group should be discussed and listed before final choices are made. The skills (leadership, interviewing, report writing), background knowledge (Judaic, educational, community sociology) and personality qualities (openness to diverse viewpoints, cooperativeness) that will be needed to complete the work of the planning group must be considered. The steering group should decide whether their goals will best be furthered if membership on the planning group is on the basis of institutional representation, *ad personam*, or a combination of both. Achieving balanced representation from the various segments of the community may also be a goal when selecting planning group members.

Specifically, the committee should include:

! lay leadership. The participation of the top lay leadership from a range of institutions increases the likelihood of their understanding and support. This means involving the lay governance which sets policy, approves budgets and raises money.

! federation and agency planning professionals. Typically, because the federation serves as the Jewish community's central address and planning instrumentality, its professionals serve as primary staff for continuity planning efforts. In communities where there are central agencies for Jewish education, their professionals should certainly play central roles, given the primacy of Jewish education. Depending on the scope and focus of continuity planning, professionals from other agencies (*e.g.*, JCC, JFCS) should also be involved. Often, federation and agency professionals serve in a staff or consultative role rather than as regular members of the planning group.

! religious leaders. The opinions and insights of these powerful community leaders are critical to the success of the process. They can also serve as resources to articulate the principles of Jewish tradition and their specific ideological bodies.

!   educators. Because education is at the heart of continuity, educators (directors and teachers in formal and informal programs) must be represented in the planning group. Their knowledge of Judaica, the state of the art in formal and informal Jewish education and the realities of the learning setting will be important as the committee defines appropriate and realistic goals and objectives. Their involvement is also crucial because they must design and implement the programs which translate the goals and criteria for success established by the planning group.

!   representatives of target populations. It is often appropriate to include representatives of the sub-populations for whom programs are being designed (*e.g.*, young adults, intermarried couples, young families) in the decision-making process. All too often target populations are not represented among planning groups. The temptation is to plan for groups, rather than with them. The penalty for excluding them is that they remain disenfranchised, so that rather than sharing in the plan they become marketing targets who must be co-opted.

Optimal size and organization. The desire to create a wall to wall coalition must be balanced with the need to limit participation to a viable number of members. In some communities, the solution is to divide the planning group into working groups, each assigned to develop recommendations relating to a particular aspect of planning. A liaison committee coordinates the efforts of these groups, and the planning group as a whole affirms the recommendations and presents them to the appropriate decision-making body.

General information about how other communities have organized their continuity planning bodies is presented on page 42. Worksheet 4 (p. 43) may be used to identify potential candidates for membership on the planning committee or task force, and then, following discussion, to list nominees.

How have other communities organized their continuity planning bodies?

In Fall 1993 a survey was sent to all North American federations to gather preliminary descriptive information about Jewish continuity planning activities continent-wide. The survey included several questions about the membership composition of the planning groups. Responses indicated:

The size of the planning groups varied greatly from community to community (ranging from 10-180 members), but most had between 20 and 56 members. The question of how to involve such large groups is apparent. Many communities addressed the dilemma by breaking down into smaller working groups to gather information, deliberate and to prepare recommendations to present to the group as a whole.

In many cases, the composition of the planning group reflected and modeled the community's continuity agenda. For example, where strengthening synagogue-federation relations was a key element of the continuity agenda (as we believe it should be) there was strong emphasis on including lay and professional leadership from each congregation in the community. Other communities relied much more heavily on federation officers and board members and significant contributors.

! The selection process varied from community to community. For about a third of the communities responding to the survey, planning group members were selected ad personam, based on their personal attributes and characteristics; fewer communities asked institutions and agencies to nominate their own representatives; a bit more than a third of the communities used a combination method, including both institutional representatives and selected individuals.

Worksheet 4 - Selecting a Planning Committee or Task Force

Use this worksheet to identify potential candidates for membership on the planning committee or task force, and then, following discussion, to list nominees.

Begin by thinking about your goals for the overall composition of the planning group. Is a wall-to-wall coalition important for the process to succeed in your community? If yes, what constituencies must be included? Are there key community leaders who must be involved?

What is the optimum number of members for your community?

Although the number of planning committee members can vary depending upon the setting, work groups larger than ten usually prove very difficult to coordinate and manage. You may therefore wish to consider breaking the full planning committee down into smaller sub-groups to work on particular aspects of the plan.

Constituency	Persons to Consider	Persons to Invite

Allocating Resources: Time and Money

Developing a Realistic Time Frame

Planning is a complex and arduous process. The planning committee should develop and agree to a realistic time frame for each aspect of planning and for the entire process. In doing so, the amount of time that both the professionals and lay members of the committee can realistically devote to their assignments must be considered, as well as how long each task can be expected to take. Of course, activity phases may overlap. One working group may address one aspect of the plan while others function in other areas.

Once the final plan has been approved, sufficient time must also be allotted for implementation, which will likely involve program, administrative and staff changes, including hiring, training and retraining personnel.

General information about the time frames utilized by other communities is presented in the box below. Worksheet 5 (p. 45) may be used to plot the time frame for each stage of the planning process.

What time frame have other communities used for their continuity planning processes?

The 1993 survey of continuity processes indicated that the planning processes for most communities extended over 18-24 months. The initial three to six months were devoted to laying the groundwork and preliminary planning. The formal planning process usually lasted for approximately 12-18 months.

Since responses to the survey came from mostly large and large-intermediate communities, smaller communities may need to adjust the time frame to meet their needs. On the one hand, because smaller communities have fewer institutions and many participants have overlapping roles, a shorter time frame may be feasible. On the other hand, limited resources and staff may call for a more extended process.

Worksheet 5 - Developing a Realistic Time Frame

Use this worksheet to plot the time frame for each stage of the planning process. Be sure to take into account constraints on the time of both lay and professional participants, as well as the ongoing calendar of the community. Remember: One working group may address one aspect of the plan while others function in other areas.

Activity Phase	Sept. Oct. Nov. Dec. Jan. Feb. Mar. Apr. May June July Aug. Sept. Oct. Nov. Dec. Jan. Feb.
Organizing the Planning Effort	
Gathering Background Information	
Visioning	
Choosing a Planning Strategy	
Identifying Goals and Objectives	
Designing/Adopting Programs	
Planning for Program Evaluation	
Implementing Programs	
Evaluating Programs	
Continuing Continuity Planning	

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Anticipating Costs (Financial and Human)

In some cases, resources other than the time and expertise of committee members may be required or desired. For example, an outside facilitator may be needed to help the committee develop a vision and achieve consensus on goals and objectives; professional assistance may be needed to conduct and analyze a needs assessment; there will be administrative costs associated with meetings of the committee or task force, including staffing. The planning committee should therefore anticipate financial costs for the planning process (aside from implementation costs, to be considered later) and determine how these will be covered before proceeding.

General information about how other communities have funded continuity planning efforts is provided below. Worksheet 6 (p.47) may be used to estimate costs for the continuity planning process, and to determine how they will be covered (e.g., service-in-kind, special allocation).

How have other communities funded the planning process?

In most communities initial continuity planning has been supported by existing budget, reallocation of human and financial resources and services in kind. In a few communities, this was supplemented by endowment funds, special contributions from leadership or special grants.

Federation executives or other available staff have the responsibility for staffing continuity initiatives in most smaller communities. In larger communities with budget and planning departments, responsibility for staffing continuity planning processes has usually been assigned to senior planning staff and to education planners in federations or central agencies for Jewish education, where they exist.

Worksheet 6 - Anticipating Costs of the Planning Process

Use this worksheet to estimate costs for the continuity planning process, and to determine how they will be covered (e.g., service in kind, special allocation, etc.). Do not include implementation costs at this time.

Line Items	Anticipated Cost	Funding Source(s)
Human resources ! Additional staff time ! Outside Consultants	$	
Committee expenses ! Administration ! Printing ! Other	$ $ $	
Data collection and analysis	$	
Other (*e.g.,* meetings)	$	
Total	$	

Delineating the Decision-Making Process

As the planning group begins to work, there must be clear delineation of who is responsible for various aspects of the decision-making process. Agreement must be reached about answers to the following:

!   Is the continuity planning group an independent entity, or is it responsible to the board of the federation or some other entity?

!   To what body will its recommendations be presented?

!   How will decisions be made about funding implementation of the plan, and how will oversight of implementation be coordinated?

The relationship between the continuity planning group and any other existing planning groups must be also clarified. For example:

!   What is the relationship between the continuity planning body and other entities such as an education committee or commission, a community-wide long-range strategic planning process, the federation's regular mechanism for planning and allocations, and agency or organizational planning bodies?

!   What is the decision-making mechanism and time-table? To whom do recommendations for consideration need to be brought and by when?

Worksheet 7 may be used to delineate the decision making process.

Worksheet 7 - Delineating the Decision-Making Process

Use this worksheet to delineate the decision making process.

1.   Is the continuity planning group an independent entity?   [ ] Yes   [ ] No

        If not, to what other body is it responsible (*e.g.*, the board of the federation or some other entity)?

2.   To what body will the continuity planning group present its recommendations?

3.   How will decisions be made about funding implementation of the plan?

4.   How will oversight of implementation be coordinated?

5.   What is the relationship between the continuity planning body and other entities such as an education committee or commission, a community-wide long-range strategic planning process, the federation's regular mechanism for planning and allocations, and agency or organizational planning bodies?

6.   What is the decision-making mechanism and time-table? To whom do recommendations for consideration need to be brought and by when?

3. Understanding Community Needs

Informed decision-making has the greatest likelihood of succeeding. Members of the planning group need to be familiar with the strengths, weaknesses, opportunities and threats existing in and facing the community in order to deal with them. The issues to be addressed by a continuity planning effort should emerge from a scan of the environment designed to provide necessary background about the community including:

!   *the population*: the demographics and Jewish profile of the community, its current growth status and future trends;

!   *communal infra-structure*: the role and mission of each of the agencies and institutions that comprise the Jewish community and their inter-relationships; the regular mechanisms for community planning, allocations and program implementation, and how changes in these are made;

!   *Jewish life quality factors*: the current status of institutions, programs, services, participation levels, satisfaction levels, etc., related to Jewish continuity within the community;

!   *available human and financial resources*: the current human and financial resources that are available or might be mobilized for efforts in the area of Jewish continuity and identity development;

!   *community culture and history*: the context for the current communal situation;

!   *the broader culture*: the major issues and challenges facing Jews and Jewish communities at the end of the 20th century, and the opportunities and resources available to meet these challenges.

Data for the environmental scan can (and should) be collected in a number of ways.

!   If data from a recent community demographic study is available, it should be re-analyzed to focus on the types of questions listed above related to identity and continuity. Synagogue, JCC and campaign rosters can provide information about affiliated Jews.

!   Key informants (professionals and lay leaders) and/or advisory councils should be interviewed to provide information about communal infra-structure, Jewish life quality factors, available human and financial resources, and community culture and history.

!   Surveys and/or focus groups can be conducted to gather information about participation and satisfaction levels.
!   Communities should take advantage of resource materials and consultations available

from JESNA, CJF and other Jewish organizations.

It is important to remember that the purpose of the environmental scan is to collect the type and amount of information necessary to inform the decision-making process. It is not necessary or advisable to turn this phase into a massive research project which saps the energy and resources of the planning group.

Worksheet 8 (pp. 52-53) may be used to outline the types of information needed to guide continuity planning. Note data that is presently available as well as how additional information will be gathered.

Worksheet 8 - Planning Information Gathering

Use this worksheet to outline the types of information needed to guide continuity planning. Note data that is presently available as well as how additional information will be gathered.

Type of Information Needed	Means of Gathering Information/ Available Data
The population ! What are the demographics and Jewish profile of the community? ! What is its growth status? Is the Jewish community expanding, contracting or preserving the *status quo*? ! What trends can be extrapolated in anticipation of future changes? ! Are there particular sub-populations in the community which are experiencing significant changes?	
Communal infra-structure ! What are the agencies and institutions that comprise the Jewish community, what is the role and mission of each, and how do they relate to each other? ! How does the community normally go about planning, allocations and program implementation? how does it make changes in these?	
Jewish life quality factors ! What is the current status of institutions, programs, services, participation levels, satisfaction levels, etc., related to Jewish continuity within the community? ! Are there populations which are under-served?	

Type of Information Needed	Means of Gathering Information/ Available Data
Available human and financial resources ! What human and financial resources are currently available, or might be mobilized for efforts in the area of Jewish continuity and identity development? ! Are there non-traditional resources (*e.g.*, local secular colleges and institutions, Jewish professionals in general fields who might bring their expertise to bear)?	
Community culture and history ! What is the historical context for the current communal situation? ! How did the Jewish community come to be the way it is? ! What are contextual factors from the broader society (*i.e.,* locally, nationally and internationally) that might have implications?	
The broader culture ! What are the major issues and challenges facing Jews and Jewish communities at the end of the 20th century? ! What are the opportunities and resources available to meet these challenges? ! What are other communities doing in this area?	

4. Visioning

If you don't know where you are going, any road will take you there.

Operationally defining Jewish continuity by describing the community's ideal vision of itself is often a powerful first step in developing a strategy and plan. Without such a global vision, a community risks generating an assortment of discrete programs, each of which may be successful or beneficial in its own right, but which may not bring the community closer to its goal.

Creating a vision is a collaborative process. It requires that planning group members have time and opportunity to work together as a team. Several communities have scheduled retreats (or day-long meetings) under the guidance of professional facilitators utilizing values clarification techniques for this purpose.

There are many techniques for developing a vision. Some involve tackling the task in a straight forward manner by addressing basic questions (as outlined on Worksheet 9) in small discussion groups and coming together to reach consensus. Others utilize experiential exercises as the springboard to reach the same goal. For example, in one community the planning group was asked to assume the role of the staff of the community's Jewish newspaper in 2010. Their task was to produce (or outline) an anniversary issue of the paper that would be an accurate representation of Jewish life in their community at that future date.

Worksheet 9 outlines the types of questions to be answered by a visioning process, regardless of the technique used to generate it.

Worksheet 9 - Visioning

No matter what visioning process the community utilizes, the following questions should be addressed:

1.   What are we talking about when we speak of Jewish continuity? More Jews? More Jewishness? More Judaism?

2.   What is your ideal vision of your Jewish community in 2010? What are the demographics and institutional dynamics present?

3.   What is your ideal vision of the lives of Jews in your community in 2010? (Be sure to include the many sub-populations in your vision.) What are normative experiences for Jewish identity building and identification?

4.   How does your vision differ from current reality?

5.   In broad terms, what needs to be changed (i.e., improved, transformed, created) in the community in order to achieve this vision?

5. Choosing a Planning Strategy

After developing a picture of what is (the existing strengths, weaknesses, opportunities and threats) and what should be (the communal vision), the planning group must develop a strategy to move from where they are to where they want to be.

Inevitably, the agenda for change is much greater than the available resources, and communities must face the difficult task of deciding where and how to begin the change process, and which approach is likely to have the greatest and most immediate impact.

There are a number of different ways in which to organize the planning process conceptually, which will in turn influence how it should be organized structurally and functionally. The organizing rubrics identify different foci for attention, which in turn often reflect different assumptions about the nature of the changes that need to be made and the ways in which these changes are most likely to be effected. Typical organizing rubrics include:

X   target populations (defined in terms of demographic or Jewish characteristics);
X   life-cycle stages;
X   key institutions (*e.g.*, synagogues, day schools);
X   program areas (e.g., family education, the Israel experience);
X   processes perceived as leading to fundamental change (e.g., professional development, strengthened institutional partnerships).

These rubrics may also be combined in a variety of ways to yield distinctive strategic approaches (*e.g.*, focusing on gateway institutions working with specific population groups).

General information about planning strategies utilized by other communities to organize the next steps of the process is presented on the following pages. Worksheet 10 may be used to formulate your community's planning strategy.

What are some of the planning approaches adopted by other communities?

A number of communities have chosen to identify key populations as their point of entry to tackling the continuity challenge. Some have focused on critical opportunities during the lifespan when individuals and families are typically most open to influence, and the experiences and institutions which can serve as gateways to participation in Jewish life at those times; others have concentrated on vulnerable sub-populations.

!   Target Populations I: Gateways and Critical Moments
        Providing intensive positive Jewish experiences at critical moments during the lifespan, especially during the formative years, is seen as the most effective means of building identity and thereby ensuring continuity. Moderately identified individuals and families with young children are targeted as particularly appropriate groups for identity building efforts. By improving, intensifying and making the programs offered by the gateway institutions more accessible to greater numbers, this approach seeks to maximize their impact at the times when people are most open to influence. Programmatic initiatives often adopted under this approach include family education, day schools, summer camp, Israel experiences, etc.

!   Target populations II: Weak Links in the Continuity Chain
        Reaching out to members of groups who are typically at risk of becoming disconnected from the Jewish community is viewed as a pivotal continuity activity. College students, singles and intermarried couples are targeted because of the potential implications for future generations.

Rather than focusing on specific populations, three other approaches begin from the perspective of changing communal institutions and dynamics by stimulating institutional transformation, strengthening and stimulating the community as a whole by supporting new partnerships, and seeking to impact on the fundamental underpinnings of educational improvement.

!   Institutional transformation
        Beginning with the judgment that, in part, the continuity crisis exists because many institutions with significant potential to support Jewish identity formation are not fulfilling that potential due to their inability to overcome internal and external obstacles, this approach seeks ways to enable institutions to become more effective. Examples include: enabling congregations to become learning communities for the whole family rather than merely offering supplementary schools focusing on pre-Bar Mitzvah education; supporting the efforts of JCCs to become centers for cultural and informal education rather than merely glorified health clubs; providing means for campus organizations to become flexible resources for a broad range of Jewish activities on campus rather than merely a home away from home for already committed students.

!   New partnerships
        Where the term *continuity* invokes the image of a unified Jewish community which commands the loyalty of individual Jews, one of the goals of continuity planning is strengthening and stimulating the community as a whole by supporting new partnerships between existing

institutions. Communities adopting this planning approach have provided human and financial resources to encourage joint projects and collaborative ventures.

!   Building blocks
        Viewing the issue of continuity systemically, planning groups adopting this approach seek to affect those underlying factors which will have an impact community-wide. Most of the communities currently following this approach share the belief that Jewish continuity demands significant improvement of Jewish education. They have determined that improving the quality of educational personnel and dramatically increasing community support for Jewish education (especially the commitment of important communal lay leadership) are the foundation of educational improvement. The projects and programs they initiate are therefore directed toward those ends.

A third category of approach melds the emphasis on identity building in individuals with the focus on institutional change.

!   Hybrid strategy
        Some communities have devised *hybrid* strategies which couple identity building with community building. For example, after targeting particular sub-populations within their community, these communities have encouraged institutional transformation efforts and/or inter-institutional collaboration by issuing grant RFPs which emphasize institutional change to heighten identity-building effectiveness or give preference to community-wide and inter-institutional programs and projects.

Worksheet 10 - Choosing A Strategy

Use this worksheet to select an organizing framework (planning strategy) for the next steps of the planning process.

1.   What are the key emerging needs in our community, and what type of organizing framework or planning focus might be the most effective in addressing them?

2.   Are our major issues (or first priorities) related to:

>   !   maximizing participation at critical opportunities (gateways) during the lifespan?
>   !   vulnerable populations?
>   !   improving institutions?
>   !   building and strengthening partnerships between institutions and agencies?
>   !   identifiable building blocks (*e.g.*, professional development, leadership development)?

3.   What are the apparent factors leading other communities to adopt particular planning approaches (*i.e.*, gateways and critical moments, weak links, institutional transformation, new partnerships, etc.)?

4.   Which approach appears most consistent with our particular set of issues?

5.   Which approach(es) focuses on areas where we can realistically bring about change?

6.   Should two or more approaches be combined?

6. Identifying Goals and Objectives

Once consensus has been reached on the mission statement and overall planning strategy, a goals structure can be developed. The planning group needs to formulate its goals, prioritize them and then make decisions about programs in light of available human and financial resources.

A goals structure is a listing of ten to twenty goals reflecting the communal direction in dealing with continuity. These goals specify what is to be done and how much is to be accomplished in achieving the communal mission. Such statements will need to be further broken down into objectives and clarified very precisely. This type of detail is necessary in order to determine programmatic decisions, make implementation choices, and conduct evaluations.

The goal setting process can be approached in several ways. Members of the committee (or various subcommittees) can develop their own sets of goals or utilize those prepared by other communities. Once this is done, they need to be put in some type of priority order. A useful method for doing this is using the nominal group technique which is a method for structuring small group meetings that allows individual judgments to be effectively pooled. The technique is used in situations in which there is uncertainty or disagreement about the nature of problems and possible solutions.[14]

The group should begin by reviewing needs-assessment documents, communal scans, and the accepted mission statement, and move on from there to identifying goals and setting priorities.

Worksheet 11 may be used to identify goals and objectives related to the mission and needs already articulated by the planning group.

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[14] Carl M. Moore, *Group Techniques for Idea Building* (Beverly Hills, CA: SAGE Publications Inc., 1987).

Richard Krueger, *Focus Groups: A Practical Guide for Applied Research* (Beverly Hills, CA: SAGE Publications, 1988).

Worksheet 11 - Identifying Goals and Objectives

Use the worksheet on the facing page to identify goals and objectives related to the mission and needs already articulated by the planning group. By recording responses to the following questions on the chart provided, the planning group will have a visual mechanism for reviewing and prioritizing needs and for drafting general goals and objectives related to each.

1.   What are the critical continuity needs in our community (based on review of needs assessment documents and the community scan)?

2.   Is addressing this need consistent with the planning process mission statement and overall strategy selected? (Yes/No)

3.   What is the level of communal support for addressing this need? (High/Medium/Low)

4.   What is the likelihood of success in addressing this need? (High/Medium/Low)

5.   Is there a consensus for action in this area? (Yes/No)

6.   What is the relative priority of addressing this need as part of continuity planing process?
        !   *fundamental (F)*:   directly related to the planning process mission and strategy
        !   *important (I)* : related to the mission/strategy, but not as much as above
        !   *legitimate (L)*: consistent with mission/strategy, but not pressing
        !   *optional (O)*:   beneficial, but not really relevant to mission/strategy

7.   What is the general objective (in measurable terms, if possible) to be met in addressing the need?

NOTE: Once programs are developed to meet the objectives, groups responsible for implementation will further delineate objectives and determine how to achieve them.

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1 Need	2 Mission/ strategy Fit	3 Communal Support	4 Success Likelihood	5 Action Consensus	6 Priority	7 General Objective

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7. Designing/Adopting Programs to Meet Goals and Objectives

The next step is to create an action plan that will allow the community to meet its goals and achieve its vision. The guiding questions for this part of the process are: *What programs and initiatives will best allow the community to achieve its goals? Who will do what?* and *How will the community pay for it?*

What specific programs and initiatives will best allow the community to achieve its goals?

A great deal of very exciting and creative work is going on around the country in the areas of Jewish education and identity building, but programs vary in their relevance for specific goals. Therefore, in creating or adopting programs communities must carefully select and adapt those initiatives which will help them achieve their goals.

Who will do what?

Many Jewish communal institutions, organizations and institutions are involved in Jewish education and identity and community building activities. All of these groups are tremendous resources, both potential and actual, for achieving the community's goals. It will be the task of the planning group, with the help of the institutions themselves, to identify institutional capacities and interests, and to outline both possible divisions of labor and collaborations between them. Proposed approaches must respect the ongoing missions and autonomy of all institutions, as well as support and stimulate innovation. It will be important to discover boundaries for collaboration and to create a climate of ongoing dialogue and mutual understanding. It will be necessary to decide:

! which goals would benefit from centralized *vs*. decentralized approaches, grass-roots *vs*. central initiatives, coalitions *vs*. single actors, broad-based *vs*. specific approaches;

! what specific programs and initiatives will be adopted for the community;

! how plans can be implemented in the most cost-effective and efficient manner; which institutions have experiences that could be used to enrich others' work, and which should strike out in new directions; which institutions are uniquely qualified to be the lead agents for particular objectives or projects.

How will the community pay for it?

The costs (human and financial) of achieving the planning group's goals is likely to be substantial. At the same time, commitments to ongoing programs are not likely to diminish. The planning group must:

!   find additional funds to be invested in the system as well as ways for the various stakeholder groups to share in the costs of expanded communal efforts; and

!   secure the commitment and strong backing of all the major stakeholder groups to assume responsibility for implementation and support of aspects of the plan.

Listed on the pages that follow are a variety of program initiatives currently being pursued or proposed to promote Jewish continuity. These may serve to stimulate thinking about what initiatives should be selected to advance a particular community's goals.

Worksheet 12 may be used as a framework for determining the programs to achieve the community's goals, assigning responsibilities for implementing the community's plan and for etermining how to secure the necessary human and financial resources.

Program Prototypes

Communities have developed and adapted many types of programs in order to reach their continuity goals. These include both *formative* and *transformative* experiences, efforts to improve the experiences of those already in the system and outreach to attract groups and individuals on the periphery of the community.

As communities plan their own initiatives, they often benefit from knowledge about the experiences of others in the field. The following brief descriptions outline current prevalent approaches which communities may wish to adopt and adapt. However, it is important that planners constantly keep their own community's goals in mind. No matter how attractive a program, it is only appropriate if it suits the local communal context, vision and goals.

Educational Settings: Formal

Recognizing the centrality of Jewish literacy and knowledge to identity development and identification, many communities are seeking to improve formal education (schooling) through:

!   planning initiatives

        "   initiating studies and/or strategic planning processes involving all or part of the Jewish education stakeholders in the community (*e.g.,* to assess teacher training needs, to recommend programs and strategies to strengthen congregational schools, to assess Jewish day care and early childhood needs);

        "   creating or re-organizing central agencies or mechanisms for providing centralized educational services (*e.g.*, Jewish education resource center);

!   funding initiatives

        "   creating or revising funding mechanisms for day schools;

        "   creating or revising funding mechanisms (in some cases creating funding formulas) for congregational (and communal) supplementary schools;

        "   providing funding to schools (especially congregational supplementary schools) through special program grants;

!   initiating community-wide efforts to recruit more students to day schools (by working with single-denomination schools to broaden their appeal to a wider range of families);

!   launching model programs and/or new direct services (*e.g.,* integrated multi-agency early childhood program, model supplementary school program, consolidated Hebrew high school).

Educational Settings: Informal

Viewing experiential and cultural encounters as important ways of fostering Jewish identification, a number of

communities are reinforcing informal education by:

! sponsoring or supporting Jewish cultural programs (*e.g.*, performing arts centers and groups, film series, classes and institutes on contemporary topics);

! organizing and conducting community-wide holiday and Jewish experiential happenings (*e.g.*, mobilization of all community members to celebrate Shabbat with their congregations on a designated Friday, community-wide holiday events);

! providing community support for specific camping programs and subsidies to campers for Jewish overnight camps;

! establishing community-wide planning and implementation mechanisms for informal education such as:

" mechanisms for centralized coordination of programming and assistance to individual institutions (*e.g.*, a community Youth Services Office, a Director of Jewish Programming);

" a retreat center;

" Jewish Latch Key and Infant Day Care programs.

Educational Settings: Adult Education

The central role of lifelong learning in strengthening Jewish identity and Jewish identification has motivated a number of communities to place high priority on supporting, establishing and expanding opportunities for adult education in their communities. Approaches have included:

! importing and sponsoring high quality, intensive adult education and leadership development programs developed by the Florence Melton Adult Mini-School, CLAL, Wexner Heritage Foundation, etc., to spearhead and augment local efforts;

! developing a range of offerings collaboratively within the community (such as an intercongregational retreat, a community-wide school for continuing Jewish education, a comprehensive adult education catalogue listing all available adult education offerings in the community, a community-wide *kallah* month of adult learning, single community-wide learning events).

cont.

Special Needs

In an effort to strengthen linkages to the community among populations that are often on the periphery (such as those with special needs), several communities are:

!   planning or trying to establish Jewish group residential homes for people with developmental disabilities;

!   developing programs to facilitate outreach and inclusion of people with developmental and emotional difficulties and their families in ongoing community and congregational programs;

!   providing professional support and development to congregations to assist them in providing special needs education for their students (*e.g*., by funding master teachers to assist congregational schools with their special needs students, by funding and providing workshops for teachers on integration of children with special needs in Jewish school programs);

!   seeking funding for Jewish summer camp programs for youngsters with developmental difficulties.

Jewish Family Education

Just as the role of the family in transmitting Jewish identity, ritual and learning is indisputable, the need to encourage, empower and enable many of today's families to function as rich settings for Jewish learning and living is undeniable. Addressing the need for Jewish family education has become a central component of nearly every community continuity effort. Approaches include:

!   providing special funding through program grants to support specific Jewish family education programs in congregations (*e.g.*, single events, retreats, ongoing congregational programs);

!   offering grants to enable congregations to engage specialists to develop family education programs;

!   providing pre- and/or in-service training for teachers, principals, and family educators in aspects of Jewish family education;

!   providing direct services such as conducting Jewish family education programs, either on a community-wide basis (*e.g*., through special events) or focusing on particular target groups (*e.g.*, unaffiliated families);

!   planning for a community system of family education to both support institutional (congregational, JCC and day school) initiatives and community-wide efforts.
        cont.

Israel Experience

A serious educational program in Israel for youth and teens has been identified as one transformative experience which can be particularly potent in developing Jewish identity and identification. In an effort to affect this particularly impressionable age cohort, many communities are promoting Israel experience programs by:

!   funding incentive grants and need-based scholarships for travel to Israel on formal programs. Often, matching bonus grants are provided for those also receiving funding from congregations;

!   establishing incentive savings programs, whereby families, congregations and federation contribute over a number of years to a child's fund for an Israel program during the high school period. A number of communities are establishing these savings programs and registries as part of program established by the CRB Foundation and administered by JESNA;

!   designing community sponsored and run Israel experience programs for teens and young adults;

!   designing and running pre- and post- Israel experience programs, to maximize the meaningfulness and impact of the programs for community participants;

!   establishing Israel Program Centers to serve as clearinghouses, information centers and promoters of Israel experience programs (and other Israel related efforts).

Teen Programming

Among communities focusing on particularly important and/or vulnerable groups, many have targeted teens. Efforts strengthen Jewish connections and programming for adolescents include:

!   sponsoring events, programs, and services such as:

    "   teen summits/retreats, teen federation, arts and leadership institutes;
    "   integrated Hebrew high school and informal programs;
    "   college search services;
    "   outreach programs (*e.g.*, to new American teens);

!   improving the skills and knowledge of staff working with teens through professional development.
        cont.

College and Young Adult Populations

College students and young adults are viewed as particularly vulnerable populations with regard to Jewish identity and continuity. For this reason, they have become a primary focus for a number of communities which are:

! establishing new agencies or positions to coordinate services for college students and young adults and to provide greater variety and quality of programming;

! providing funding for Israel experiences specifically for these subpopulations;

! developing a mechanism to recruit students for Jewish education and communal careers;

! revitalizing programs for young leaders and young couples to be more responsive to their needs and interests.

Outreach

A number of communities are engaged in efforts to strengthen weak links in the continuity chain. This is one area in which there is a great deal of inter-agency collaboration, particularly between federations and synagogues, and to some extent with JCC's. Outreach efforts have been directed toward:

! intermarried Jews and their families, through educational programs (such as the Stepping Stones program) which are being replicated in many communities, informal programs, lectures and personal connections;

! New Americans, through special formal education programs for children and adults, family education and family-to-family matching programs;

! unaffiliated and community newcomers, through informal programs and individual contacts by outreach workers, such as the Connections program;

! other target populations identified in particular communities (*e.g.*, single parents, gays and lesbians, Jews by choice).

cont.

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Professional/Personnel Development

Capable and effective professional leadership is one of the fundamental building blocks for most continuity efforts. A number of communities have responded to this need by:

! funding and establishing intensive professional development programs for educational leaders;

! supporting and organizing workshops and seminars for Jewish educators on relevant topics (*e.g.*, family education, moral development);

! establishing Jewish content and professional development courses and seminars for federation and other agency personnel.

Federation/Synagogue Relations

Communities seeking to promote Jewish continuity by changing communal institutions and dynamics, as well as many that are focusing on populations such as families and youth, have been working to strengthen federation-synagogue relations by:

! offering funding through program grants, scholarships and funding for Israel experience programs and summer camps;

! engaging in partnerships for joint programs and projects in areas of mutual interest (*e.g.*, outreach, leadership development, adult education, Israel;

! providing services and personnel (*e.g.*, professional and leadership development);

! establishing mechanisms for collaboration and joint planning (*e.g.,* Presidents' Councils, Rabbinic Cabinets, etc.).

cont.

Worksheet 12 - Designing Programs

Use this worksheet as a framework for choosing the types of programs needed to achieve the community's goals, assigning responsibilities for implementing the community's plan, and determining how to secure the necessary human and financial resources.

Goal	Program(s)	Auspices/ Sponsorship	Cost	Funding Source(s)

8. Planning for Program Evaluation

Serious commitment to change requires careful monitoring and feedback. There must be ways to measure and evaluate progress toward achieving the chosen program objectives and overall goals. There is not only a need for accountability (especially when financial and human resources have been invested) but also a more pressing need for monitoring and feedback. The adage the purpose of evaluation is not to prove but to improve is never more apt than in efforts like these, where the goal is to enhance the success of each project and program.

For these reasons, evaluation must be organic to the program. It should be designed and implemented from the outset to provide useful information for program planning and ongoing feedback to guide the program as it evolves and develops. It cannot be an afterthought, tacked on at the end of projects and subsequently shelved.

To be maximally useful, an evaluation should provide planners, implementers and funders with the kinds of information they need to make mid-course corrections, to inform decision making, and to assess progress toward the goals articulated.   To be reliable, the kinds of questions asked and information gathered must correspond to the programs' goals. Gathering information from a variety of sources enhances the reliability of the evaluation. Therefore, multi-dimensional designs which involve gathering different kinds of data from a variety of sources are preferable. Optimally, this should include descriptive information (what happened, who participated, etc.), objective outcomes (what were the effects on attitudes, behaviors and knowledge), and subjective assessment (participants', professionals' and interested observers' judgments).

Gathering data at the outset of a project (as a baseline) as well as further along will provide valuable information about how participants and organizations change during their involvement. Data collection can include a combination of written surveys/questionnaires, individual and/or focus group interviews, program observations, documentation (*e.g.*, attendance records, program descriptions, written materials), etc. Analysis and interpretation are critical aspects of evaluation which must follow collection of the data and materials.

Evaluation will not occur spontaneously, so time and resources must be allocated to make sure it takes place. In fact, a number of communities and foundations providing funding for continuity initiatives have stipulated that funding is contingent on planning and conducting ongoing evaluations, and have required that an amount equivalent to a given percentage of the grant (5-10%) be earmarked for evaluation.

Depending on human and financial resource availability, evaluations may be conducted by professional evaluators, program implementers (self-study), planning group members, or a combination of the above. They may be external (under the auspices of the planning group) or internal (required of grantees or programs as a condition of support).

Use Worksheet 13 as an outline for planning program evaluation.

Worksheet 13 - Planning for Program Evaluation

Use the following table to as an outline to guide planning for evaluation of each program to be implemented. Add questions to gather the distinctive types of information needed to evaluate specific programs.

Type of Information	Information Source	Data Gathering Mechanism
1. Descriptive About the participants at the beginning of the program, and as it progresses (*e.g.*, relevant knowledge, behaviors and attitudes, who participated and who did not): About the program (what was done): Other:		
2. Objective Outcomes About what goal-related changes (if any) were observed during course of the program in participants: professionals: institutions: broader community: Other:		
3. Subjective Outcomes About stakeholders' (participants, professionals, interested observers) assessments of the program (*e.g.*, what they felt were the strengths and weaknesses of the program: its impact: why they felt it succeeded, or not): Other:		

cont.

4.   What costs are associated with evaluation of this program?

How will the evaluation be funded?

5.   Who will conduct evaluation of this program? (Different people may be responsible for different aspects.)

What outside resources may be consulted?

6.   Who is responsible for analysis and interpretation of findings, and presentation to the planning group?

7.   What is the timetable for evaluation?

8.   How will findings from the evaluation feed back into the planning and implementation process?

9. Implementing Programs

In program implementation nothing happens automatically or goes forward without hitches. The recommendations of the planning group must therefore include mechanisms for overseeing the implementation of its proposals and resources (staff and funds) for thoughtful monitoring and review. This may mean that the planning group itself will continue to meet as an implementation group, or that a successor body will assume the task.

Those responsible for oversight must continually keep an eye to the program's goals and objectives and how implementation of the program fits into the community's vision.

Those responsible for implementation must be flexible and receptive to feedback. Mechanisms must be established to feed information back into system, and conversely, implementers must be prepared to make mid-course corrections based on such feedback.

Planning groups must understand that getting new programs started takes time, and that detecting evidence of impact may take even longer. Typically, even successful programs take hold gradually and their effects (particularly in an area as complex as Jewish identity development) may not be visible for a considerable period of time. It is natural for groups involved in planning a new initiative to want to see quick results, and perhaps to doubt themselves or the program implementers if these are not observed. But pulling the plug too quickly or seeking to make sudden course changes without clear evidence that they are required may undermine the entire planning process.

Jewish continuity planning is inherently a high risk venture (if we knew just what to do, presumably we wouldn't be in the situation we're in!). Encouraging a spirit of responsible and self-critical entrepreneurship among program designers and implementers should be part of continuity planning.

10. Evaluating Programs

Many times, amid the enthusiasm and excitement (and stresses and concerns) of implementing programs, the evaluation and monitoring falls by the wayside, despite the best of intentions.

Don't let it happen! Utilize the valuable insights gained from monitoring and evaluation efforts to shape next steps of program implementation. When those involved in program development and the community see the usefulness of the information gathered they will be more likely to participate in the process.

11. Continuing Continuity Planning

Like any other long range strategic planning, continuity planning cannot be a one-time endeavor. (In a sense, our fondest wish should be that such planning goes on forever C or at least until the days of the Messiah.) Times change, and hopefully, as a result of implementation of the plan, the Jewish community will move closer to its vision. But this vision will itself be transformed if our efforts are successful. Needs will change, new situations and challenges will arise, our aspirations will grow. Therefore, to be effective, after the initial round of planning is completed, communities must continue with ongoing auditing, evaluation, feedback and periodic updating as conditions change.

A standing oversight committee should be established, or the responsibility for accountability should be assigned to an existing body. Such a group would be responsible for annual review to ensure that programs and initiatives established under the plan continue to meet their goals and to be responsive to communal needs.

A Last Word

Jewish continuity planning is a relatively new arrival on the communal scene. In some respects, what is needed to make it work is little more than what we have always regarded as sound community and planning process. Yet, Jewish continuity planning also takes us into uncharted territory its goals and its demands on our institutions and leaders are perhaps greater than any we have faced in the past. It is an audacious effort to change individual lives and transform our collective future.

We have no guarantee of success. Indeed, some rate our chances as slim. But we know that the effort is worthy, and even historic. If we can combine a powerful passion for Judaism and its future with the cool recognition that our work must be meticulous and thoughtful, then our chances of success will surely increase. We hope that this *Handbook* will prove helpful in promoting such meticulousness and thoughtfulness. If so, then we will have achieved our objective in helping communities fulfill theirs.

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