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**MS-831: Jack, Joseph and Morton Mandel Foundation Records, 1980–2008.**  
Series B: Commission on Jewish Education in North America (CJENA). 1980–1993.  
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Mandel, Morton. Saint Louis, Mo. and Los Angeles, Calif. trip,  
April 1990.

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4/12/90

SCHEDULE FOR MLM TRIP TO LOS ANGELES AND SAN FRANCISCO

APRIL 18-20, 1990

Wednesday, April 18

- 7:10 p.m. Continental 1065 - depart from Cleveland.
- 9:23 p.m. Arrive in Los Angeles; overnight at Beverly Wilshire Hotel (213-275-5200). Steve Huberman will pick up MLM at airport and take to hotel. The LA Federation is paying for the hotel.

Thursday, April 19

- 7:45 a.m. Steve Huberman will meet you at the hotel to take you to the Federation building.
- 8:00 a.m. Breakfast - LA/CJF Personnel Demonstration Project and Task Force. LA is one of the pilot communities for the CJF study. They would like you to discuss the CJF Task Force and your views on personnel recruitment and retention. [file #1]
- 10:45 a.m. Steering Committee of the Commission on the Jewish Future. Question and answer session with the Commission leadership. [file #2]
- 12 noon Lunch - Commission on the Jewish Future meeting, also open to JFC executive committee, Board of Rabbis, BJE, and other select participants. Broad topic for your presentation is "Building the Jewish Future." [file #3]
- 2:00 p.m. Meeting with Barbi Weinberg and Steve Huberman to discuss linkages between CJENA and Los Angeles. [file #4]
- 5:30 p.m. Steve Huberman will pick you up at the hotel to go to the Weinberg's to review participants in dinner meeting.
- 6:00 p.m. Dinner - Parlor session at Barbi and Larry Weinberg's home with prospects capable of \$100,000+ gifts to LA's Fund for Jewish Education. Although there will be no fundraising at the meeting, its purpose is to motivate major philanthropists to eventually make significant commitments to LA's fund. [file #5]
- 8:30 p.m. Depart Weinberg's for LA airport. Hanan Alexander from University of Judaism will drive you to the airport. American 982 to San Francisco departs at 10:00 p.m.
- 11:30 p.m. Arrive San Francisco; taxi to Fairmount Hotel (reservation made by Phyllis Cook).

Friday, April 20

(Phyllis Cook and Brian Lurie will be attending all meetings scheduled, with exception that Brian will not attend meeting with Steve Dobbs at Koret.)

8:00 a.m.	Breakfast - (International Room of Fairmount Hotel on Mezzanine Floor) Meeting of key members and prospects of San Francisco JCF endowment committee. Mel Swig will be chairing the meeting. Their purpose is to have you describe the supporting foundation model and how it works to the benefit of the donor/family and the community.	[file #6]
9:30 - 10:30 a.m.	Private meeting with Gerson Bakar, who is considering creating a supporting foundation. This is still tentative.	[file #7]
10:30 - 12 noon	Meeting with Stephen Dobbs, Executive Director of Koret Foundation. Phyllis Cook will take you to the meeting.	[file #8]
12 noon - 12:30 p.m.	Lunch with Don Seiler and Bob Lurie. Seiler will be at the breakfast meeting. Lurie may be out of town.	[file #9]
3:00 p.m.	Continental 886 from San Francisco to Cleveland. Phyllis will take you to the airport for the flight.	



4/12/90

[file #1]

TALKING POINTS FOR THE LA/CJF PERSONNEL  
DEMONSTRATION PROJECT AND TASK FORCE  
THURSDAY, APRIL 19, 1990 - 8:00 A.M.

1. Federations' strength rests on their basic voluntary nature as an expression of Jewish communal consensus. The lay leaders determine the policies and make the basic decisions that govern the community. The professionals who staff the federations under lay oversight are the core. The quality of the lay leadership attracted and retained by federation is inextricably bound up with the quality of the professional staff, and the success of the entire enterprise can rest on this single facet of Jewish communal life.
2. The staffing of federations has not kept pace with the dramatic increase in responsibilities and opportunities. The field continues to attract outstanding people, but it is not getting enough with the basic leadership qualities and the necessary education and training. The number of vacant positions is growing, and search committees are frustrated by the paucity of viable candidates for key positions. Responsibilities are not being carried out, and many people are moving from one position to another, and from one city to another. These conditions indicate a crisis in personnel which poses a threat to the continued effectiveness of federations and therefore puts the quality of Jewish community life at risk. It is not so much that the people we have aren't the right people, but rather that there aren't enough good people to maximize the opportunities at hand.

3. One of the key ingredients to the resolution of the personnel crisis is greater involvement of lay leaders in professional staff development. The existence of Los Angeles' Task Force indicates that this Federation has seriously tried to address this issue. Unless lay leadership assumes a more active role in planning, policymaking, and oversight in the personnel area, it will not receive the appropriate priority. That priority must translate into budgeting decisions in each year's federation budget with respect to compensation levels, investments in training institutions, scholarship support, and continuing education opportunities for staff.
4. Our communities need a comprehensive personnel system that will address the entire range of current problems and will also be able to meet changing conditions in our society. Accordingly, the report of the CJF task force addressed recruitment, basic education, training, continuing education, supervision, placement, career tracking, counseling, development of federation staffs, as well as compensation issues.
5. Efforts on implementation of the CJF report thus far have focused primarily in the areas of recruitment, staff retention, and career development.
  - a. In recruitment, CJF has been much more aggressive about sharing information about the federation field. As a result, many more inquiries were received during the past two years about CJF's FEREP



scholarship program, and more students who attend the social work and Jewish communal service programs that are part of the FEREP consortium are now heading for careers in federations. In addition, CJF has been recruiting more actively at UJA young leadership conferences, meetings of Hillel and UJA campus leadership, annual conferences of Jewish fraternities, and a Jewish law student organization.

- b. In the area of staff retention and career development, CJF has instituted a new professional institute, targeted at federation professional staff employed for less than two years. A pilot program was run in the area covered by southern Connecticut through Maryland and two additional institutes are scheduled, including one in Los Angeles. The reaction to the first NPI was very positive.
  - c. Another effort has been to improve the kind of written information available about the federation field. A new information kit for potential recruits and a resume book are the first of a number of publications designed to increase knowledge about careers and federation, and to educate and sensitize professionals at all levels about the importance of good personnel practices.
6. In general, the opportunities for what we can accomplish in the Jewish community at this time are enormous. However, we do not now have the numbers and quality of staff available to take advantage of those

opportunities. We all know that every time a senior position in the field opens up, it takes a Federation a long time to find the right person to fill that position. What is apparent at the top of the field is also occurring at every level and if we don't address this serious problem, the ability of the federation community to accomplish its goals will be severely limited in the future.

7. Los Angeles and all of the larger community federations need to generate their own comprehensive programs at recruiting, educating and training and developing a full career line for all of its professional staff, to guarantee their long-term personnel needs.



4/17/90

[file #2]

TALKING POINTS FOR THE LA COMMISSION ON THE JEWISH FUTURE,  
STEERING COMMITTEE

THURSDAY, APRIL 19, 1990 - 10:45 A.M.

(MLM - This is a Q & A session, so only a few introductory comments are indicated here, along with some of their key points you will want to hit upon in the discussion.)

1. MLM should recognize the important role this group is playing in leading the Los Angeles community in this effort;

- Active leadership is the key ingredient for success.
- Top community leadership must establish a high priority for Jewish education.

2. Federation's role must be to initiate and drive the process.

- Community priorities are ultimately reflected in federation allocations.
- More and more community resources will need to be devoted to Jewish education if we are to ensure continuity.



3. While federations are gearing up to meet this challenge, particularly in light of current pressures with Soviet resettlement, leading philanthropic families will need to provide a "bridge" of funding.

- Federation allocations will, of necessity, grow more slowly.
- Private philanthropy can move more quickly to establish a higher level of funding for Jewish education, and leverage the system to move faster than it otherwise might.

4. Serious Jewish education initiatives will need to focus much of their efforts on developing and improving personnel.

- Every Jewish education enterprise depends on the quality of its personnel, and we have a crisis in personnel at every level of the Jewish education system.
- The Commission on Jewish Education in North America has focused on personnel as one of its key enabling priorities, and looks to visionary communities to lead national efforts in this area.

## TALKING POINTS FOR BREAKFAST MEETING WITH SAN FRANCISCO

## ENDOWMENT LEADERSHIP

FRIDAY, APRIL 20, 1990 - 8:00 A.M.

1. Supporting foundations are a relatively new concept which evolved out of 1969 Federal legislation which put significant constraints on private foundations. Now, the supporting foundation idea is picking up steam in the Jewish federation field. They have proven to be a valuable philanthropic tool that works to the benefit of the donor and the community. In effect, a donor becomes a partner with a public charity (Federation) in administering a fund used to pursue the donor's and the federation's philanthropic interests. It has worked so well for us in Cleveland that we have now reached the point where twenty families have created such foundations, and they are all operating to the satisfaction of the donor families.
2. Because the foundation is partnered with a public charity, the federal government treats it as a public charity, as distinct from being treated as a private charity. The assumption by government is that the public charity will assume some of the oversight and monitoring responsibilities in its operation. Therefore this is an instrument that government encourages. Some of the important benefits that flow from this include:
  - a. Public charities are exempt from the 2% excise tax that private charities must pay to the government. Private foundations therefore

have less income available for philanthropic purposes. Obviously, the larger the fund, the greater the implication of this difference.

- b. Gifts to a supporting foundation, especially of appreciated property, are treated more liberally than they are with a private foundation.
  - c. Government reporting requirements are much more stringent in the private foundations.
3. Every donor faces a different situation and must ultimately choose what is right for themselves. Supporting foundations fit some situations, private foundations fit others; philanthropic funds fit yet others. Some donors might find that a combination of approaches is useful.
4. Our family created a supporting foundation because we believed it would meet our needs. (Comment on the family's experience with the supporting foundation.)
5. The Commission on Jewish Education in North America is a perfect example of the kind of initiative that the family has been able to undertake, in partnership with the community, using the tool of the supporting foundation as a means to accomplish particular goals. The Mandel



Associated Foundations is the sponsor of the Commission, and covers all of the expenses of the work of the Commission, including staff, cost of meetings, occupancy, etc. In this way, the Foundation is able to provide a resource for a continental initiative which can work in partnership with the federation system and other agencies, as well as help leverage that system in a particular direction. (You may want to comment briefly on what the Commission is trying to accomplish.)

