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Letter of Understanding. Drafts, 1992-1993.

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COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

TELEFAX

TO: Jack Ukeles

DATE: September 8, 1992

FROM: Art Rotman

FAX #: 260-8760

Number of pages (including this sheet) 8

MESSAGE:

ATTACHED ARE JO ANN SCHAFER'S NOTES ON THE MEMORANDUM OF UNDERSTANDING. IN ADDITION, I SUGGEST THE FOLLOWING:

1. WE ELIMINATE ALL LEGAL SOUNDING LANGUAGE
2. WE DEFINE THE DIFFERENCE BETWEEN THE PLANNING PHASE AND THE ACTION PHASE
3. THE UNDERSTANDING IS FOR A 3-YEAR PERIOD WITH AN ANNUAL REVIEW AND EVALUATION
4. INTERWEAVE THE TERM "JEWISH CONTINUITY". WHERE APPROPRIATE CAN BE SUBSTITUTED FOR JEWISH EDUCATION.

DRAFT

MEMORANDUM OF UNDERSTANDING
(with suggested revisions as of 8/26/92)

Agreement made this ____ date of ___, 1992 between the Council for Initiatives in Jewish Education (CIJE hereafter) and _____ (Atlanta, Baltimore, Milwaukee) Jewish Federation (the Lead Community hereafter) to establish the Jewish Community of _____ (Atlanta, Baltimore, Milwaukee) as a Lead Community for Jewish educational excellence.

1. PURPOSE

(SHOULD NOW BE A PREAMBLE)

The Project is to be implemented in two phases: a Planning Phase and an Action Phase. (ELIMINATE DIVISION INTO PLANNING AND ACTION PHASES)

The parties hereto do agree as follows:

During the Planning Phase, the Lead Community agrees to:

- A. Establish a Lead Community Committee to direct the Project. The Committee will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by a major lay leader. (NAME OF COMMUNITY CHAIR SHOULD APPEAR IN THE AGREEMENT)
- B. Provide opportunities (such as town meetings or subcommittees) for stakeholders (DOES WORK NEED EXPLANATION?) from all sectors of the community to meaningfully participate in the planning process -- including consumer of Jewish education (e.g., parents, students), educators, board members and rabbis.
- C. Appoint a Lead Community Planning Director (at least 1/2 time for one year (ALSO APPOINT ONE OR TWO DEDICATED STAFF PERSONS TO THE PROJECT FOR PLANNING AND/OR IMPLEMENTATION))
- D. Develop a one-year plan for the improvement of Jewish education -- including a needs assessment, mission or vision statement, program

priorities, and plan for financial and human resources development and allocation.

E. Develop a five-year Plan for the improvement of Jewish education.

- (SPECIFY THAT IN THIS PLAN THE COMMUNITY IS EXPECTED TO MAKE MAJOR EFFORTS IN THE IMPROVEMENT OF EDUCATORS, MAJOR SETTINGS IN WHICH EDUCATION TAKES PLACE, I.E., SUPPLEMENTAL SCHOOLS, EARLY CHILDHOOD, JCC, ISRAEL EXPERIENCE, DAY SCHOOLS)

- (COMMUNITY SHOULD ADDRESS ISSUES LIKE A MORE SUPPORTIVE CLIMATE FOR EDUCATION; MAJOR SEGMENTS OF THE POPULATION SHOULD ALSO BE ADDRESSED, I.E, UNDERTAKE PROJECT INITIATIVES THT WILL DEAL WITH MAJOR SEGMENTS OF THE JEWISH EDUCATION SYSTEM)

F. Integrate the findings of the Best Practices Program appropriate to the Lead Community. (see below)

G. Identify and begin one or more experimental programs with the first year. (ADD the community and its individual institutions need to set visions, goals and objectives.)

H. Utilize, and collaborate with the CIJE on the Monitoring, Evaluation and Feedback Project.

During the Planning phase, CIJE agrees to:

- ADD something about this being a collaborative education enterprise
- ADD (from Preliminary Workplan) "Negotiate with foundations, organizations, and purveyors of programs (training institutions, JCCA and JESNA) the nature of their involvement and their contribution to Lead Communities."

I. Provide a Best Practices Project which will offer models of successful programs in a variety of areas in Jewish education including supplementary schools, early childhood education, ICC programs, day schools, etc.

The Project will help the Lead Community adapt and introduce these models in the light of local needs and interests.

J. Provide technical assistance in planning and educational development. The community will have access to (DELETE up to XXX hours of)

assistance from a (DELETE Talent Bank or) roster of experts provided by CIJE (at no cost to the community).

- K. Introduce potential funders to the community -- including national foundations.
- L. (DELETE Develop and implement) Provide a Monitoring, Evaluation and Feedback system into the community to serve both the Lead Community and CIJE.
- M. Convene Lead Communities leadership for periodic meetings on common concerns.

ISSUE: (include Action Phase in this agreement or only the Planning Phase?)
(SEE NOTE ABOVE ABOUT ELIMINATING DELINIATION OF TWO PHASES)

During the Action phase, the Lead Community agrees to:

- Commit additional financial resources to Jewish education.
- Appoint a full-time Lead Communities Director
- Mobilize human and financial resources necessary to produce Jewish educational change

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

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

3. TERM

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

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

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

Lead communities planning

1. *Letters to 3 and 6 and press release*
2. - Letter of understanding. CIJE and each lead community
3. - Funding of projects in the lead communities
4. - Lead community - Development of plan by each community
 - A. - With assistance of CIJE staff
 - B. - According to "Guidelines" set by CIJE
 - C. *National resources*
 - D. *development plan - AH*
5. - CIJE contact with each community
6. - Joint event and/or seminar for lead communities
 - A. - Lay and or professional
 - B. - Dependent on common threads which will be observed in early stages
7. - GA. informal reception with lead community leadership
 - Session
8. - Communications

8/25/92

Rough Draft
8/26/92

Memorandum of Understanding

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

1. PURPOSE

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

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

2. SCOPE

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

The parties hereto do agree as follows:

During the Planning Phase, the Lead Community agrees to:

- 4 Establish a Lead Community Committee to oversee the project. The Committee will be made up of top community leadership representing all aspects of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by a major communal lay leader. *divers elements*
- 5 Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g. parents, students), educators, board members and Rabbis.
- 6 Appoint a Lead Communities Planning Director (at least 1/2 time for one year)

we expect a substantial amount of the project on both

& implementation

Appoint a dedicated staff to this project to provide for planning & implementation

have names of suggested community chair be known at time of agreement

- *D* Develop a one-year plan for the improvement of Jewish education -- including a needs assessment, mission or vision statement, program priorities, and plan for financial and human resource development and allocation.
- *E* Develop a five year Plan for the improvement of Jewish education -- including
- *F* Integrate the findings of the Best Practices Program appropriate to the Lead Community. (see below).
- *G* Identify and begin one or more experimental programs within the first year.
- *H* ^{Collaborate with and to on the} Utilize the results of the CIJE monitoring, evaluation and feedback project.

During the Planning phase, CIJE agrees to:

- *I* Offer ^{models} ~~examples~~ of good programs and experience through the Best Practices Project. Best practices will be identified in: Supplementary Education, Early Childhood Education, JCC programs; Israel Experience; Day School; Campus Programs; Camping; & Adult Education. Information on all areas will be made available, between October, 1992 and the end of May, 1993.
- *J* Provide technical assistance in planning and educational development. The community will have access to ~~up to XXX hours of assistance from a Talent Bank or roster of experts~~ provided by CIJE (At no cost to the community).
- *K* Introduce potential funders to the community -- including ^{national} continental foundations interested in specific project areas.
- *L* Develop and ^{provide} implement a monitoring, evaluation and feedback system. ^{with community}
- *M* ^{leadership} Convene lead communities for periodic meetings on common concerns. ^{serve to}

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

During the Action phase, the Lead Community agrees to:

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

During the Action phase, CIJE agrees to:

- ? — *mobilize human & financial resources necessary to produce Jewish educational change.*

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

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

3. TERM

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

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

CIJE

Federation

By: _____

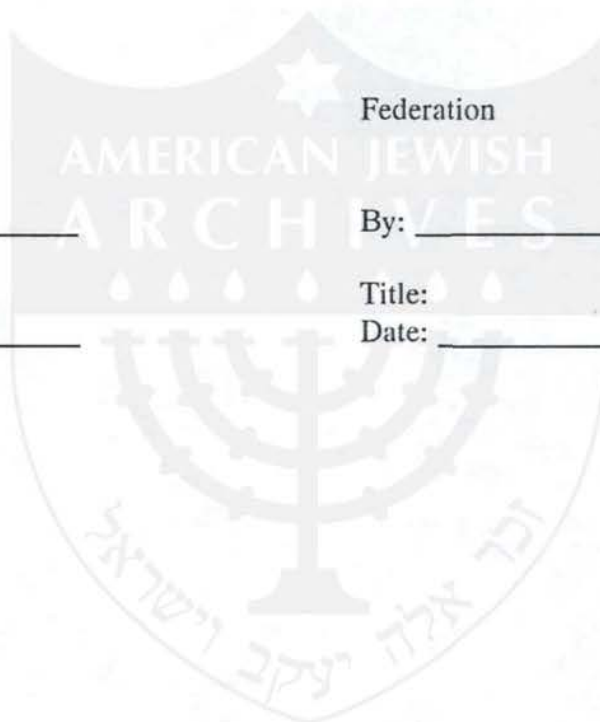
By: _____

Title:

Title:

Date: _____

Date: _____



COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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MEMORANDUM

TO: CIJE - File DATE: September 11, 1992

FROM: Arthur Rotman SUBJECT: Notes on meeting
September 16, 1992

CIJE Staff:

Sol Greenfield
Jack Ukeles ✓
Shulamith Elster

LETTER OF UNDERSTANDING

Discussed what needs to be included and Ukeles will have available by the end of the day on Wednesday, September 16.

There was much discussion on whether a mission statement is needed in this document. The conclusion of the group was that this is optional. The document could stand on its own without a mission statement or we could include one. There seems to be consensus that a mission statement should not be prepared until well on into the planning process, probably not until after six to nine months.

Elster made points that the consideration of a mission statement is valuable more because of the process than because of the result.

Ukeles is preparing a "boilerplate" letter which after discussion with the communities will end up with three different versions.

While the above specifies a separation of the visits by various members of the staff, there is much to be said for "bundling" so that in the one day there could be meetings with the professional staff by our pros and, at the same time during the day, there could be the meeting with AR and the lay people.

TIMETABLE

Elster and Ukeles will visit the communities prior to October 21 to meet with professional staff and to begin discussions on the Letter of Understanding.

This will be followed up by a visit by AR with the lay people October 21-31 in each of the three communities. This would be designed so that the result of these meetings would provide us with "final" document for signing.

Sometime between November 15 and December 15, there would be a "kick-off" in the local community. One of our CIJE top lay people would be involved. From the local community there should be perhaps 30 to 40 people representing the various elements in the community. A signing of the Letter of Understanding could or could not be a part of this kick-off. Program could include a Barry Holtz and an inspirational speaker. At one point during the day, there should be a meeting of about 6 to 10 of the "heavy hitters".

JOINT SEMINAR

In view of the fact that the level of sophistication amongst the communities are so different, we agreed to abandon the plan to have the planning directors meet together.

However, it was suggested that we explore the possibility of having several people from each of the communities come together, probably some time in late November or early December. By that time, the planning guidelines will have been prepared and could serve perhaps as a basis for discussion aside from some inspiration, etc.

First Draft
9/16/92

LETTER OF UNDERSTANDING

Dear _____,

I am writing to confirm that the Jewish Community of _____ [Atlanta, Baltimore, Milwaukee] has agreed to serve as a Lead Community for the profound improvement of Jewish education.

PREAMBLE

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

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

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

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

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

THE PROJECT

This letter is a summary of the discussions held on _____, 1992 between the Council for Initiatives on Jewish Education (CIJE), and the _____ [Atlanta; Baltimore, Milwaukee] Jewish Federation and to clarify our mutual expectations with regard to the implementation of the Lead Communities Project in _____ [Atlanta, Baltimore, Milwaukee].

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

1992-93 is the Planning Year (see below)

1993-94 is the first Action Year

1994-95 is the second Action Year

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

Along with the five year plan, the community will also prepare an Action Program for 1993-94 which will include the schedule of the specific improvements to be undertaken; and the costs and revenues associated with each specific improvement effort.³

The plan and the action program will be completed by May 31, 1992.

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

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

In support of these efforts, CIJE agrees to:

- Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education, Early Childhood Education, JCC programs; Israel Experience; Day School; Campus Programs; Camping; & Adult Education. Information on all areas will be made available between October, 1992 and the end of May, 1993. The Lead community will

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

adapt and introduce these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE.

- Provide technical assistance in planning and educational development. The community will have access to assistance from a roster of experts provided by CIJE at no cost to the community.
- Introduce potential funders to the community -- including continental foundations interested in specific project areas.
- Negotiate with foundations, organizations, and providers of programs -- training institutions, JCCA and JESNA -- to define the nature of their involvement and their contribution to Lead Communities.
- Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.
- Convene lead community leadership for periodic meetings on common concerns.

The Lead Community agrees to:

- Establish a Lead Community Committee to direct the project. The Committee will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by _____.
- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g. parents and students), educators, board members and Rabbis.
- Appoint a Lead Communities Planning Director (at least 1/2 time for 1992-93) to staff the Lead Communities Committee and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g., the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.
- Appoint a full-time Lead Communities Director to direct the Action Program for 1993-94 onward.

- Integrate the findings of the Best Practices Program appropriate to the Lead Community. (as discussed above).
- Identify and begin one or more experimental programs in 1993.
- Significantly expand the communal resources committed to Jewish education. While it is premature to quantify significant expansion at this point, one community that seriously implemented the results of its commission on Jewish continuity increased its commitment by ____% over three years. [use Cleveland data].
- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.
- Prepare a 5 year plan, and annual action programs, as described above.

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

CIJE

Federation

By: _____

By: _____

Title:

Title:

Date: _____

Date: _____

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

=====

How the community plans to approach major improvements in educational personnel

- What improvements are envisioned for each major setting within which Jewish education takes place: congregations and supplementary schools; JCC's, Israel experience; Day schools; and camping; higher Jewish education campuses

- How to create a more supportive climate for Jewish education

- How to approach the Jewish education of each major group in the life cycle: singles; families with young children; teens; the college years; empty nesters; older people

- How the community plans to encourage linkages (e.g. between formal and informal educational experiences)



(A+)
Provide a Best Practices Project
which will offer models of ~~good~~ ^{successful}
programs in a variety of ~~Jewish~~
areas ~~including~~ ~~in~~ Jewish education
including: Supplementary Schools,
Early Childhood Education, JCC
programs, Day Schools, etc.

The Project will help the Lead
Community adapt and introduce
these models in the light of
local needs ^{and} interests. ~~and~~

Draft
9/23/92

LETTER OF UNDERSTANDING

Dear _____,

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

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

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

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

This letter is a summary of the discussions held on _____, 1992 between the Council for Initiatives on Jewish Education (CIJE), and the _____ [Atlanta; Baltimore, Milwaukee] Jewish Federation. Its purpose is to clarify our mutual expectations with regard to the implementation of the Lead Communities Project in _____ [Atlanta, Baltimore, Milwaukee].

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

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

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

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1994-95 is the second Action Year

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

Along with the five year plan, the community will also prepare an Action Program for 1993-94 which will include the schedule of the specific improvements to be undertaken; and the costs and revenues associated with each specific improvement effort.³

The plan and the action program will be completed by May 31, 1992.

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

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

In support of these efforts, CIJE agrees to:

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

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

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

The Lead Community agrees to:

- Establish a Lead Community Committee to direct the project. The Committee will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by _____.
- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g. parents and students), educators, board members and Rabbis.
- Appoint a Lead Communities Planning Director to staff the Lead Communities Committee and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g., the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.
- Appoint a Lead Communities Director to direct the Action Program for 1993-94 onward.
- Integrate the findings of the Best Practices Program appropriate to the Lead Community, (as discussed above).
- Identify and begin one or more experimental programs in 1993.

- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g. parents and students), educators, board members and Rabbis.
- Appoint a Lead Communities Planning Director to staff the Lead Communities Committee and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g., the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.
- Appoint a Lead Communities Director to direct the Action Program for 1993-94 onward.
- Integrate the findings of the Best Practices Program appropriate to the Lead Community. (as discussed above).
- Identify and begin one or more experimental programs in 1993.

- Appoint a Lead Communities Planning Director to staff the Lead Communities Committee and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g., the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.

- Appoint a Lead Communities Director to direct the Action Program for 1993-94 onward.

- Integrate the findings of the Best Practices Program appropriate to the Lead Community. (as discussed above).

- Identify and begin one or more experimental programs in 1993.

- Significantly expand the communal resources committed to Jewish education.⁴ The community will work with CIJE to establish an appropriate target for expenditure for Jewish education.
- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.
- Prepare a 5 year plan, and annual action programs, as described above.
- Work with CIJE to disseminate the results of their experience to other communities.

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

CIJE

Federation

By: _____

By: _____

Title: _____

Title: _____

Date: _____

Date: _____

⁴ While it is premature to quantify significant expansion at this point, one community that seriously implemented the results of its commission on Jewish continuity increased its commitment by ____% over three years. [use Cleveland data].

(ILLUSTRATIVE)

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

=====

- How the community plans to approach major improvements in educational personnel
- What improvements are envisioned for each major setting within which Jewish education takes place: congregations and supplementary schools; JCC's, Israel experience; Day schools; and camping; higher Jewish education campuses
- How to create a more supportive climate for Jewish education
- How to approach the Jewish education of each major group in the life cycle: singles; families with young children; teens; the college years; empty nesters; older people
- How the community plans to encourage linkages (e.g. between formal and informal educational experiences)



MEMORANDUM

To: Annette Hochstein
From: Jack Ukeles *Jack*
Date: October 5, 1992
Re: Lead Communities Letter of Understanding
cc: Shulamith Elster

I am writing to continue our discussion about the Letter of Understanding on Lead Communities. I had hoped to have a teleconference before Art left for Europe, but we were not able to get it together, because of chagim and individual schedules.

As I understand it, you and Seymour have two major concerns:

- 1) that the draft letter does not appropriately convey the idea that the Lead Communities Project is about systemic change, it sounds like just another commission.
- 2) that the document needs to include much more of the specific content of the Lead Communities Project as envisioned in "A Time to Act" and subsequent materials.

We may have a disagreement about the nature and purpose of this document; we may also disagree about how to generate change.

I believe that we need to do it, not talk about it. The Letter of Understanding represents talk, not deeds; the longer we spend processing the Letter of Understanding, the more frustrated everyone will get. Our initial visits to the three communities where we talked through the draft document (but didn't give them anything in writing) reveals that:

- 1) the communities have a broad understanding of the Lead Communities concept.

- 2) they now know what CIJE brings to the collaboration and what is expected of the communities.
- 3) They want to get on with it.

The only way to develop a commitment to systemic change is to work with the communities in a careful year-long educational process. That should be our goal for this year's work — their plan should be a concrete expression of the maximum that is achievable.

I understand your anxiety given all that you and Seymour have invested in this. But I look for a little more confidence that Art, Shulamith and I share your basic vision and know what we are doing.

The real risk to this project is not the language of the letter of understanding, but the effort to broker controversial resources. When one of the CIJE "fund-raisers" projected a 10% increase in local resources to Jewish education as an acceptable lead communities outcome, I was truly surprised. If CIJE had a solid plan to assemble a ten million dollar war chest, we would be in a lot better shape to pursue the agenda I believe that we share.



MEMORANDUM

To: Art Rotman

From: Jack Ukeles *JU*

Date: 10/16/92

CC: Shulamith Elster
Sol Greenfield

- =====
1. The draft Letter of Understanding is attached. If Mort o.k.'s it today, I would love to be able to fax it to the communities this afternoon.
 2. For your agenda for our meeting on Wednesday, could you include time to discuss the "Launch" work program; Planning Guidelines outline; and some initial discussion of our suggested approach to community consultation (Talent Bank). If we don't have time for all three items, the first, I think, is the most important.
 3. I ran into Dr. Emanuel Rackman (retired President of Bar-Ilan University). He asked me to send Mort regards. He also asked me to "remind Mort of his promise." I haven't a clue as to what he thinks Mort promised him. Should I drop Mort a note; drop it; or do you want to pas it along?

Draft
10/16/92

LETTER OF UNDERSTANDING

Dear _____,

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

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

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

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

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

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

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

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

1992-93 is the Planning Year (see below)

1993-94 is the first Action Year

1994-95 is the second Action Year

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

Along with the five year plan, the community will also prepare an Action Program for 1993-94 which will include the schedule of the specific improvements to be undertaken; and the costs and revenues associated with each specific improvement effort.³

The plan and the action program will be completed by May 31, 1992.

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

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

In support of these efforts, CIJE agrees to:

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

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

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

The Lead Community agrees to:

- Establish a Lead Community Committee to direct the project. The Committee will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by _____.
- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g. parents and students), educators, board members and Rabbis.
- Appoint a Lead Communities Planning Director to staff the Lead Communities Committee and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g. the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.
- Prepare a five-year plan, and annual action programs (as described above).
- Appoint a Lead Communities Director to direct the Action Program for 1993-94 onward.
- Integrate the findings of the Best Practices Program appropriate to the Lead Community. (as discussed above).
- Identify and begin one or more experimental programs within the first year.
- Build the profession of Jewish education, and thereby address the shortage of qualified personnel.

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

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

CIJE

Federation

By: _____

By: _____

Title:

Title:

Date: _____

Date: _____

PHONE No. : 12122608760

Oct. 16 1992 12:12PM P01

(ILLUSTRATIVE)

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

=====

- How the community plans to approach major improvements in educational personnel (e.g., in-service education for all educators)
- What improvements are envisioned for each major setting within which Jewish education takes place: congregations and supplementary schools; JCC's, Israel experience; Day schools; and camping; higher Jewish education campuses
- How to create a more supportive climate for Jewish education
- How to approach the Jewish education of each major group in the life cycle: singles; families with young children; teens; the college years; empty nesters; older people
- How the community plans to encourage linkages (e.g., between formal and informal educational experiences)

MEMORANDUM

Revised
12/2/92

To: Art Rotman
From: Jack Ukeles *Jack*
Date: 12/1/92
Re: Draft Letter of Understanding
cc: Annette Hochstein

=====

I enclose drafts of three Letters of Understanding. These drafts reflect the changes suggested by Milwaukee and Baltimore and a conversation with Steve Gelfand in Atlanta.

I have also made some changes reflecting the changing calendar. All new material is in italics.

I changed the format slightly: instead of a Dear Mr., it is set up as a letter without a salutation; just two equal co-signers. I think that this gives a better "partnership" tone.

Please note the following unresolved issues:

1. The language about the local financial contribution in the case of Baltimore reflects the language proposed by them. It is very close to what we had originally -- they added a "commit our best efforts to..."; and included non-local as well as local resources in the 40% increment that they will try to achieve. I used the same language for Atlanta. The language Milwaukee proposed is considerably softer. It is not clear that this difference would fly in Atlanta or Baltimore. Therefore I included "Baltimore-type language in the Milwaukee draft, with a "Milwaukee-type" qualifier. I think it will be a tough sell in Milwaukee.

2. The original draft committed CIJE resources for consultation using a roster of experts. This followed from a number of discussions in your office and earlier decisions reflected in the Guidelines sent out to Lead community applicants. If CIJE is now backing away from this commitment, this needs to be explained to the communities. I have deleted the sentence about a roster of experts. This is not a change which will be missed by the local staffs.

If CIJE is now prepared to provide resources to be used for either consultation or staffing (as per the communities request at the Workshop), then this paragraph needs to be amended to reflect CIJE support for staff or consultants. (see page 2). In which case, I think we will have no problem with the change.

3. Atlanta objected to the specificity of the staffing requirement. Upon re-reading, I didn't think it was so terrible. Maybe they can suggest language to soften.

4. Atlanta expressed concern about the lack of parity in language: "There is specific language regarding expectations of lead communities, but only general language regarding expectations of CIJE. More consistency of language is preferred." I have not addressed their concern.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

LEAD COMMUNITIES PROJECT · Mailing Address · 163 Third Avenue #128 · New York, NY 10003
tel: (212) 532-1961 · fax: (212) 213-4079

December 2, 1992

LETTER OF UNDERSTANDING

The Jewish community of Baltimore and the Council for Initiatives in Jewish Education (CIJE) have agreed to participate in a joint local-continental collaboration for excellence in Jewish education, called the Lead Communities Project.

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

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

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

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

This letter covers the period to August 31, 1995.

1992-93 is the Planning Year (see below)

1993-94 is the first Action Year

1994-95 is the second Action Year

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

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

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

During 1992-93, the Jewish community of Baltimore with the advice and assistance of CIJE, will prepare a five year plan for improving Jewish education. The plan will include: a needs assessment, mission or vision statement(s), program priorities, and a strategy for financial and human resource development. The plan will build on the work of the Commission on Jewish Education of THE ASSOCIATED and incorporate appropriate elements of work already completed.

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

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

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

In support of these efforts, CIJE agrees to:

- Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education; Early Childhood Education; JCC programs; Israel Experience; Day School; Campus Programs; Camping; and Adult Education. Information on all areas will be made available between *December 1992* and *the summer of 1993*. The lead community will consider adapting and introducing these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE.
- Provide technical assistance in planning and educational development.
- Work to focus continental resources for Jewish education on the lead communities, specifically, the CIJE will introduce potential funders to the community -- including continental foundations interested in specific project areas.
- Negotiate with foundations, organizations, and providers of programs -- training institutions, JCCA and JESNA -- to define the nature of their involvement and their contribution to Lead Communities.
- Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.
- Convene lead community leadership for periodic meetings on common concerns.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

The Lead Community agrees to:

- Establish a Lead Community Committee to direct the project. The Committee will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by *LeRoy Hoffberger*.
- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g., parents and students), educators, board members and Rabbis.
- Appoint a Lead Communities Planning Director to staff the Lead Communities Committee and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g. the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.
- Prepare a five-year plan, and annual action programs (as described above).
- Appoint a Lead Communities Director to direct the Action Program for 1993-94 onward.
- Integrate the findings of the Best Practices Program appropriate to the Lead Community (as discussed above).
- Identify and begin one or more experimental programs within the first year.
- ***Address the building of the profession of Jewish education, and thereby address the shortage of qualified personnel.***
- **Mobilize community support to the cause of Jewish education.**
- Commit its best efforts to significantly expand the communal resources committed to Jewish education. Based on one community's experience in implementing the recommendations of its Commission on Jewish continuity, "significant expansion" should result in *a target of at least a 40% increase in communal resources for Jewish education by the third year action program. The definition of communal resources endorsed and underscored here includes the total dollars from which funds would be allocated, including regular allocations, local and non-local foundation grants, endowment funds raised through its Fund for Jewish Education, and other sources of funds.*
- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

- Work with CIJE to disseminate the results of their experience to other communities.

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

CIJE

Federation

By: _____

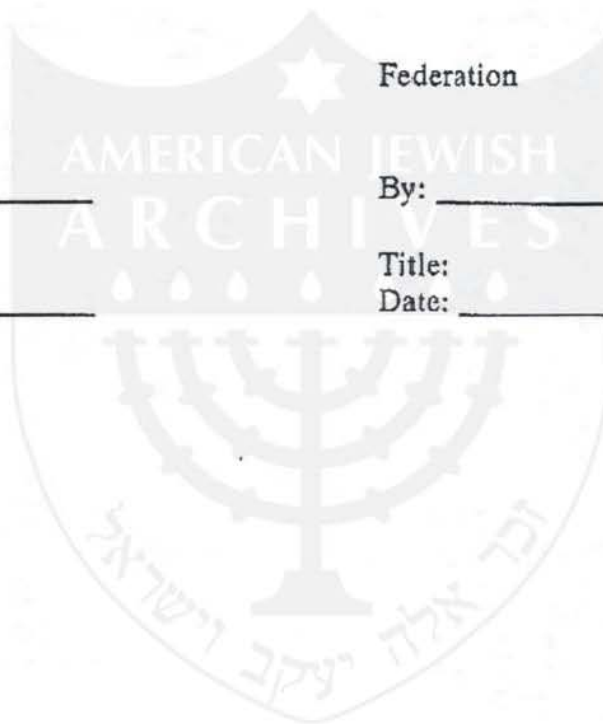
By: _____

Title: _____

Title: _____

Date: _____

Date: _____



DRAFT

12/2

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

LEAD COMMUNITIES PROJECT · Mailing Address · 163 Third Avenue #128 · New York, NY 10003
tel: (212) 532-1961 · fax: (212) 213-4078

December 2, 1992

LETTER OF UNDERSTANDING

The Jewish community of ~~Atlanta~~ and the Council for Initiatives in Jewish Education (CIJE) have agreed to participate in a joint local-continental collaboration for excellence in Jewish education, called the Lead Communities Project.

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

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

The Jewish community of Atlanta has established a Council for Jewish Continuity. The community views the Lead Communities Project as an opportunity to *increase significantly the quantity and quality of Jewish education services locally, as well as to act as a model for other Jewish communities in North America of how Jewish education can be improved in order to have a measurable effect on Jewish continuity.*

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

This letter covers the period to August 31, 1995.

1992-93 is the Planning Year (see below)

1993-94 is the first Action Year

1994-95 is the second Action Year

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

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

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

During 1992-93, the Jewish community of Atlanta with the advice and assistance of CIJE, will start to prepare a five year plan for improving Jewish education. The plan will include: a needs assessment, mission or vision statement(s), program priorities, and a strategy for financial and human resource development. The plan will build on the work of the Council for Jewish Continuity and incorporate appropriate elements of work already completed. The community, by May 1, 1993 will prepare an outline of the 5 year plan identifying the major topics to be covered, preliminary findings, *and program ideas*.

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

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

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

In support of these efforts, CIJE agrees to:

- Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education; Early Childhood Education; JCC programs; Israel Experience; Day School; Campus Programs; Camping; and Adult Education. Information on all areas will be made available between October, 1992 and the end of May, 1993. The lead community will adapt and introduce these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE.
- Provide technical assistance in planning and educational development, at no cost to the community.
- Work to focus continental resources for Jewish education on the Lead Communities. Specifically, the CIJE will introduce potential funders to the community -- including continental foundations interested in specific project areas.
- Negotiate with foundations, organizations, and providers of programs -- training institutions, JCCA and JESNA -- to define the nature of their involvement and their contribution to Lead Communities.
- Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.
- Convene lead community leadership for periodic meetings on common concerns.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

The Lead Community agrees to:

- Establish a Lead Community Committee to direct the project. The Committee will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by *William E. Schatten, MD*.
- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g., parents and students), educators, board members and Rabbis.
- Appoint *staff to the Council for Jewish Continuity* and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community (e.g., the Planning Director of Federation and the Director of the BJE) are expected to be fully involved in the process.
- Prepare a five-year plan, and annual action programs (as described above).
- Appoint *staff* to direct the Action Program for 1993-94 onward.
- Integrate the findings of the Best Practices Program appropriate to the Lead Community. (as discussed above).
- Identify and begin one or more experimental programs within the first year.
- *Address the building of the profession of Jewish education, and thereby address the shortage of qualified personnel.*
- **Mobilize community support to the cause of Jewish education.**
- Commit its best efforts to significantly expand the communal resources committed to Jewish education. Based on one community's experience in implementing the recommendations of its Commission on Jewish Continuity, "significant expansion" should result in at least a 40% increase in communal resources for Jewish education by the third year action program. *The definition of communal resources endorsed and underscored here includes the total dollars from which funds would be allocated, including regular allocations, local and non-local foundation grants, endowment funds, and other sources of funds.*
- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.

From: J. K. Associates, Inc. Phone No: 1212-333-1100

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

- Work with CIJE to disseminate the results of their experience to other communities.

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

CIJE

Federation

By: _____

By: _____

Title: _____

Title: _____

Date: _____

Date: _____



DRAFT

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

LEAD COMMUNITIES PROJECT · Mailing Address · 163 Third Avenue #128 · New York, NY 10003
tel: (212) 532-1961 · fax: (212) 213-4078

December 2, 1992

LETTER OF UNDERSTANDING

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

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

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

The Jewish community of Milwaukee has established a Jewish Education Task Force. The community views the Lead Communities Project as an opportunity to *create a vision and to frame Milwaukee's agenda for Jewish education for the 1990's, to gain a broad base of support and participation, to implement a plan that improves the overall quality of what is offered and that address service gaps, and to facilitate new initiatives in areas that address Jewish continuity concerns.*

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

This letter covers the period to August 31, 1995.

1992-93 is the Planning Year (see below)
1993-94 is the first Action Year
1994-95 is the second Action Year

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

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

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

During 1992-93, the Jewish community of Milwaukee with the advice and assistance of CIJE, will *start to* prepare a five year plan for improving Jewish education. The plan will include: a needs assessment, mission or vision statement(s), program priorities, and a strategy for financial and human resource development. The plan will build on the work of the *Jewish Education Task Force* and incorporate appropriate elements of work already completed. The community, by May 1, 1993 will prepare an outline of the 5 year plan identifying the major topics to be covered, preliminary findings *and program ideas*.

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

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

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

In support of these efforts, CIJE agrees to:

- Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education; Early Childhood Education; JCC programs; Israel Experience; Day School; Campus Programs; Camping; & Adult Education. Information on all areas will be made available between October, 1992 and *the summer of 1993*. The lead community will consider adapting and introducing these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE.
- Provide technical assistance in planning and educational development *at no cost to the community*.
- *Work to focus continental resources for Jewish education on the lead communities, specifically, the CIJE will introduce potential funders to the community -- including continental foundations interested in specific project areas.*
- Negotiate with foundations, organizations, and providers of programs -- training institutions, JCCA and JESNA -- to define the nature of their involvement and their contribution to Lead Communities.
- Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.
- Convene lead community leadership for periodic meetings on common concerns.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

The Lead Community agrees to:

- Establish a *Commission on Jewish Education* to direct the project. The *Commission* will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The *Commission* will be chaired by *Louise Stein and Jane Gellman*.
- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g., parents and students), educators, board members and Rabbis.
- Appoint a Lead Communities Planning *Coordinator* in 1992-1993 to staff the *Commission on Jewish Education* and to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community are expected to be active participants.
- Prepare a five-year plan, and annual action programs (as described above).
- Appoint a Lead Communities *Coordinator* to direct the Action Program for 1993-94 onward. (*Which may be the same person as the Planning Coordinator.*)
- Integrate the findings of the Best Practices Program appropriate to the lead community (as discussed above).
- Identify and begin one or more experimental programs within the first year.
- *Address the building of the profession of Jewish education, and thereby address the shortage of qualified personnel.*
- Mobilize community support to the cause of Jewish education.

[option one-Milwaukee]

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

[option two - JBU]

- Commit its best efforts to significantly expand the communal resources committed to Jewish education. Based on one community's experience in implementing the recommendations of its Commission on Jewish Continuity, "significant expansion" should

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

result in at least a 40% increase in communal resources for Jewish education by the third year action program. *The definition of communal resources endorsed and underscored her includes the total dollars from funds would be allocated, including regular allocations, local and non-local foundation grants, endowment funds, and other sources of funds. Recognizing that Milwaukee already allocates a higher percentage of its annual Campaign to Jewish education than most other communities, and has one of the highest rates of per capita expenditures for Jewish education in North America, this will be a difficult objective to reach.*

- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.
- Work with CIJE to disseminate the results of their experience to other communities.

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

CIJE

Federation

By: _____

By: _____

Title: _____
Date: _____

Title: _____
Date: _____

Mandel Institute

מכון מנדל

Tel. 972-2-617 418; 618 728

Fax: 972-2-619 951

Facsimile Transmission

To:	Mr. Arthur Rotman	Date:	December 10, 1992
From:	Annette Hochstein	No. Pages:	
Fax Number:			

Dear Art,

RE: Letter of Understanding

I am responding to the draft of the letters of understanding for Atlanta, Baltimore, and Milwaukee as forwarded to me by Jack on the 2nd of December -- these differ from the earlier versions I had.

As discussed at our meeting of November 23rd with MLM, the letters do not represent the joint understanding that would result from a mutually agreed design of the project. Rather, they represent the communities' understanding of the project at this time (see in particular the preambles to the letter referring to the CIJE as assisting them in their current plans).

While it would perhaps be preferable to go to work without this written agreement, it may not be possible to do so. Therefore, it was decided to include a specific clause limiting the agreement to one year. This is in order to allow us to negotiate the "real" agreement during the current year as the elements of the projects, the resources required and the contributions of the CIJE and of the community become specific and clear.

The current letter is also problematic on the following particulars:

1. The total amount of money a community will commit;
2. The need to hire special staff for the project; and
3. The definition of the current year as a planning year -- while both parties would want it also to be an action year (e.g., pilot projects).

I hope these notes are useful towards your meetings in the communities -- any progress from the current version would be great. You will certainly find out whether and how it is possible to progress from the current version.

Best regards,

Annette



COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003
FAX: (212) 213-4078

MEMORANDUM

TO: Annette Hochstein

DATE: December 14, 1992

FROM: Art Rotman

SUBJECT: Letter of Understanding

Thanks for your memo of December 10th.

The letters you have are substantially the same as those we looked at on November 23rd. At that time you did say that the Letter of Understanding should be reviewed in a year's time. However, the statement in your memo that "this is in order to allow us to negotiate the real agreement during the current year" is a new idea which I don't recall us discussing before. Perhaps we can take it up when we meet in Jerusalem.

I note the issues which you raise as "problematic." Yes, these are issues which we've discussed over the last several months. Nevertheless, we decided some time ago to go ahead with the Letter of Understanding despite the fact that they are "problematic."

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

Mailing Address: 163 Third Avenue #128
Phone: (212) 532-1961

New York, NY 10003

FAX: (212) 213-4078

*BCC: MLM
M. KRAAR
H. ZUCKER*

TELEFAX

CONFIDENTIAL

To: Seymour Fox/Annette Hochstein

Date: January 11, 1993

From: Arthur Rotman

FAX #: 011 972 2 619 951

Number of pages (including this sheet) 1

As I told you in our telephone conversation on Sunday, the communities have expressed to me on several occasions their unhappiness with the fact that they have not received material that was promised. Specifically:

- The Planning Guidelines. At the meeting with the planners in November, we said that the Planning Guide would be going out in "a few weeks" and certainly before end of the year.
- Best Practices. We promised the planners that they would have at least one of the Best Practice areas in their hands "within two or three weeks" of that November meeting.
- Vision statements need to be developed by the communities. We started discussing this in August at our meeting with our Professional Advisory Committee and at that time Seymour said he would develop a paper to assist communities in formulating such statements.
- On several occasions we have talked about having the community commissions develop a "wall-to-wall coalition." Some of the material, such as the questionnaire for Jewish educators, depends on the presence of such a coalition. However, we haven't done much in helping the communities to learn how to develop this coalition.
- While I did not discuss this with you on the phone, we did lead the planners to believe there would be several pilot projects suggested to them by now.

The executives and the planners in the communities have told me that the lack of material has affected CIJE's "credibility", both with themselves and with their lay people. They may be telling others as well. We are now faced with an issue we had never anticipated: CIJE's credibility.

I was glad to hear that you plan to have a good amount of material in the hands of the communities by the end of January. That should help.

MEMORANDUM

To: Henry Zucker
From: Jacob B. Ukeles *Jack Ukeles*
Date: January 20, 1993
Re: CIJE Letter of Understanding
cc: Ginny Levi

As per our conversation, I am sending you a copy of the most recent Letter of Understanding between Council for Initiatives in Jewish Education (CIJE) and the lead communities. All three Letters are virtually identical except for one passage in Milwaukee's Letter. I am transmitting the Baltimore Letter and the one page from Milwaukee that differs.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

LEAD COMMUNITIES PROJECT • Mailing Address • 163 Third Avenue #128 • New York, NY 10003
tel: (212) 532-1961 • fax: (212) 213-4078

January 14, 1993

LETTER OF UNDERSTANDING

The Jewish community of Baltimore and the Council for Initiatives in Jewish Education (CIJE) have agreed to participate in a joint local-continental collaboration for excellence in Jewish education, called the Lead Communities Project.

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

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

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

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

This letter covers the period to August 31, 1995.

The Jewish community of Baltimore with the advice and assistance of CIJE, will prepare a five year plan for improving Jewish education. The plan will include: a needs assessment, mission or vision statement(s), program priorities, and a strategy for financial and human resource development. The plan will build on the work of the Commission on Jewish Education of THE

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

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

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

ASSOCIATED and incorporate appropriate elements of work already completed. The community, by May 1, 1993, will prepare an outline of the 5 year plan identifying the major topics to be covered, preliminary findings, and program ideas.

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

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

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

In support of these efforts, CIJE agrees to:

- Offer models of successful programs and experience through the Best Practices Project. Best practices will be identified in a variety of areas, including: Supplementary Education; Early Childhood Education; JCC programs; Israel Experience; Day School; Campus Programs; Camping; and Adult Education. Information on all areas will be made available between now and the summer of 1993. The lead community will consider adapting and introducing these models in the light of local needs and interests during the Action Years of the project, with the advice of CIJE.
- Provide technical assistance in planning and educational development, at no cost to the community.
- Work to focus continental resources for Jewish education on the lead communities. Specifically, the CIJE will introduce potential funders to the community -- including continental foundations interested in specific project areas.
- Negotiate with foundations, organizations, and providers of programs -- training institutions, JCCA and JESNA -- to define the nature of their involvement and their contribution to Lead Communities.
- Provide a monitoring, evaluation and feedback system to serve both the Lead Community and CIJE.
- Convene lead community leadership for periodic meetings on common concerns.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

The Lead Community agrees to:

- Establish a Lead Community Committee to direct the project. The Committee will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Committee will be chaired by LeRoy Hoffberger.
- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g., parents and students), educators, board members and Rabbis.
- Appoint staff to the Lead Communities Committee to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community are expected to be fully involved in the process.
- Prepare a five-year plan, and annual action programs (as described above).
- Appoint staff to function as Lead Communities Director to direct the Action Program for 1993-94 onward.
- Integrate the findings of the Best Practices Program appropriate to the Lead Community (as discussed above).
- Identify and begin one or more experimental programs within the first year.
- Address the building of the profession of Jewish education, and thereby address the shortage of qualified personnel.
- Mobilize community support to the cause of Jewish education.
- Commit its best efforts to significantly expand the communal resources dedicated to Jewish education. Based on one community's experience in implementing the recommendations of its Commission on Jewish continuity, "significant expansion" should result in a target of a 40% increase in communal resources for Jewish education by the fall of 1996. The definition of communal resources used here includes all sources including regular allocations, local and non-local foundation grants, endowment funds raised through its Fund for Jewish Education, and other sources of funds.
- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

- Work with CIJE to disseminate the results of their experience to other communities.

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

CIJE

Federation

By: _____

By: _____

Title: _____

Title: _____

Date: _____

Date: _____

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

The Lead Community agrees to:

- Establish a Commission on Jewish Education to direct the project. The Commission will be made up of top community leadership representing all elements of the community -- Federation, congregations, institutions involved in formal and informal education, and the full spectrum of religious movements represented in the community. The Commission will be chaired by Louise Stein and Jane Gellman.
- Provide opportunities (such as town meetings or subcommittees) for stakeholders from all sectors of the community to meaningfully participate in the planning process -- including consumers of Jewish education, (e.g., parents and students), educators, board members and Rabbis.
- Appoint staff to the Commission on Jewish Education to coordinate the work of educational and planning professional resources in the community on the Plan. Senior professionals in the community are expected to be active participants.
- Prepare a five-year plan, and annual action programs (as described above).
- Appoint staff to function as Lead Communities Coordinator to direct the Action Program for 1993-94 onward. (Which may be the same person as the Planning Coordinator.)
- Integrate the findings of the Best Practices Program appropriate to the lead community (as discussed above).
- Identify and begin one or more experimental programs within the first year.
- Address the building of the profession of Jewish education, and thereby address the shortage of qualified personnel.
- Mobilize community support to the cause of Jewish education.
- Commit its best efforts to significantly expand the communal resources dedicated to Jewish education. While it is recognized that Milwaukee already allocates a higher percentage of its annual Campaign to Jewish education than most other communities, and has one of the highest rates of per capita expenditure for Jewish education in North America, the community will work to obtain those resources needed to meet the goals of the project. Based on one community's experience in implementing the recommendations of its Commission on Jewish Continuity, "significant expansion" should result in a target of a 40% increase in communal resources for Jewish education by the fall of 1996. The definition of communal resources used here includes regular allocations, local and non-local foundation grants, endowment funds, and other sources of funds.
- Collaborate with CIJE on the monitoring, evaluation and feedback system, and utilize the results.

1/21/93
L.H.H. = Copy of
attached to be reviewed
with A.H. and discussed
with staff on 2/3/93
visit.

Then reported to
MLM

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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MEMORANDUM

TO: Annette Hochstein

DATE: December 14, 1992

FROM: Art Rotman

SUBJECT: Letter of Understanding

Thanks for your memo of December 10th.

The letters you have are substantially the same as those we looked at on November 23rd. At that time you did say that the Letter of Understanding should be reviewed in a year's time. However, the statement in your memo that "this is in order to allow us to negotiate the real agreement during the current year" is a new idea which I don't recall us discussing before. Perhaps we can take it up when we meet in Jerusalem.

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