



THE JACOB RADER MARCUS CENTER OF THE
AMERICAN JEWISH ARCHIVES

MS-831: Jack, Joseph and Morton Mandel Foundation Records, 1980–2008.

Series C: Council for Initiatives in Jewish Education (CIJE). 1988–2003.

Subseries 3: Lead Communities, 1988–1997.

Box
31

Folder
18

Letter of Understanding. Milwaukee, Wis., 1992-1994.

For more information on this collection, please see the finding aid on the
American Jewish Archives website.



UKELES ASSOCIATES INC.
611 Broadway, suite 505 · New York, NY 10012
tel (212) 260-8758 · fax (212) 260-8760

FACSIMILE TRANSMITTAL SHEET

TO: Howard Weinstein	DATE: 10-1-92
COMPANY: Milwaukee Jewish Fed,	FROM: Jim Meier
FAX #: (414) 271-7081	PAGES (including cover): 3
	FAX #: (212) 260-8760

MESSAGE:

If there is a problem with this transmission
please call _____ at (212) 260-8758.

Principles of the

Understanding

Letter of Agreement Between CIJE and Milwaukee As A "Lead Community"

The broad context of the Leadership of

I. How Will CIJE Be Staffed?

CIJE is an ^{CATALYTIC} ~~intermediary~~ agency ^{for change in Jewish education} between the selected "Lead Communities", national organizations, foundations, and key resources in Jewish Education. It is staffed by an Executive Director, a Chief Education Officer and a Planning Director. The Chief Education Officer and Planning Director serve as a team that will consult and work with "Lead Communities" as they proceed in developing their strategic plans to benefit Jewish Education. In addition, CIJE employs three field researchers that will document the process of change in each community and to report progress back to local leadership as well as national sponsors. One of the three field researchers will be deployed in each of the "Lead Communities".

II. Components of the "Letter of Agreement"

A. The "Lead Community" Project is a collaborative effort between ~~national organizations~~ and local communities. It is premised on the assumption that the best way to maximize improvement in Jewish Education continentally is to demonstrate success at the local level, ~~by means of a broad based communal planning system.~~

B. CIJE's agreement with the "Lead Communities" is for three years. The first year will be dedicated to planning with the outcome consisting of:

1. A five year plan for Jewish Education. The content of each plan should include mission or vision statements, a needs assessment, an articulation of program priorities and a strategy for developing human and financial resources for Jewish Education.
2. A minimum of one program initiative, ^{to be undertaken in the Spring of 1993.}
3. An implementation plan for the year 1993/94.

C. CIJE's Responsibilities

1. CIJE will bring to each community the results of its "Best Practices" project which is a systematic effort to collect what is working well around the country in the field of Jewish Education. It will be organized by program area.
2. CIJE will provide a roster of experts and will pay for their work with and in Milwaukee as needed. ^(Preliminary estimate of value, about \$30,000 to \$40,000 per community in the first year)

3. CIJE is not a Foundation. However, CIJE will introduce "Lead Communities" to national foundations that have expressed an interest in Jewish Education and help advocate for grant funds to support program initiatives.
4. CIJE will coordinate the assistance from national organizations and training institutions to "Lead Communities" as needed.
5. CIJE will fund the field researcher component of the project to monitor the process of change and report back progress to communities approximately three times a year.

D. Responsibilities of Milwaukee As A "Lead Community"

1. Each "Lead Community" will ^{establish} ~~develop~~ a ^{Committee of} mission ^{top community leadership to direct the project} including a "wall to wall" solution of ^{institutional & religious movements agencies}
2. Each community will develop a planning system that draws input from a broad base of education stakeholders (e.g. agencies, schools, synagogues). The planning system should allow for meaningful participation by all segments including teachers and parents ~~and every religious denomination~~.
3. Each community will identify and/or hire a lead staff person to assist in the design and development of the planning process and to manage the project.
4. Each "Lead Community" will utilize the "Best Practices" project.
5. Each community will develop one pilot project in 1993 to demonstrate that progress is being made.
6. Each community will ^{significantly} ~~ultimately~~ expand resources available to Jewish Education. These resources may evolve from private foundations, endowment development, Campaign allocation or any combination of the above.
7. Each "Lead Community" agrees to monitor and evaluate its progress utilizing the field research team.
8. Each "Lead Community" will work with CIJE to disseminate information that is learned in the planning process to other communities around the country.

MEMORANDUM

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

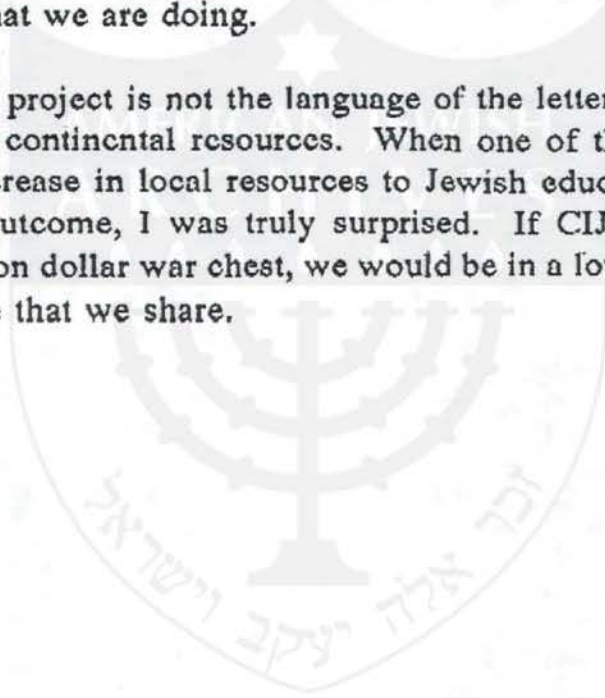
- 1) the communities have a broad understanding of the Lead Communities concept.

- 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 continental 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.



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

MEMORANDUM

To: Richard Meyer
From: Art Rotman
Date: October 21, 1992
Re: Letter of Understanding

Enclosed is a draft of the Letter of Understanding covering the mutual expectations of CIJE and Milwaukee for participation in the Lead Communities Project. The draft incorporates suggestions made at the meeting in Milwaukee with Shulamith Elster and Jack Ukeles.

Please note that on page one we have left room for you to insert a rationale statement that is specific to your community. We want you to be comfortable with this document, so feel free to edit it as needed.

If there are minor changes that you would like to make, please mark up the draft and send it back to me by fax.

If you have significant concerns with the document, I am available to come to Milwaukee in early November to discuss the Letter of Understanding in more depth. Let me know as soon as possible, so that we can coordinate calendars.

If there are no substantive changes, then you should proceed with your own professional and lay review process. We would like to hold a formal signing ceremony in Milwaukee before the end of the calendar year.

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

October 21, 1992

LETTER OF UNDERSTANDING

Dear Mr. Meyer;

I am writing to confirm that 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."^{7, 8}

The Jewish community of Milwaukee has established a Milwaukee Association for Jewish Education. The community views the Lead Communities Project as an opportunity to

.....

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.

⁷ A Time to Act (University Press of America, Lanham, Md., 1990), p. 17; see also pp. 67 - 69.

⁸ See also Lead Communities: Program Guidelines (January, 1992) pp. 7-11.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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 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 Milwaukee Association for Jewish Education 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.⁹

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.

⁹ See Appendix A for a brief description of some of the possible areas of content of a Lead Communities Plan.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

- 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.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

- 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: _____

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

(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)



MILWAUKEE JEWISH FEDERATION

1 9 0 2 - 1 9 9 2

*recognizing 90 years of service to
the Jewish community*

cc: A HONSTEIN
J. UKELES
S. ELSTER
S. GRANTFIELD

MEMORANDUM

TO: Art Rotman

FROM: Richard Meyer

DATE: November 4, 1992

RE: Milwaukee's Participation in the "Lead Communities" Project

I am pleased to inform you that our Federation Board of Directors has approved Milwaukee's participation in the CIJE's "Lead Community" Project. As a condition for our participation, we are requesting some changes in the language of the "Letter of Understanding" that was forwarded to us on October 21. I have attached a copy of the proposed changes with the most significant being a revision of the second paragraph on page 4.

Our leadership is committed to the success of the "Lead Community" Project. However, it would be unrealistic for our community to commit to significantly expand communal resources committed to Jewish education at this time. We ask that you be sensitive to the decline in our Campaign achievement over the last two years and to acknowledge our already high proportion of resources allocated to Jewish education. We therefore request that the paragraph on page 4 to be revised as follows:

- "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."

We await hearing from you further on this revision or any of the other language changes in the attached document. We look forward to working with you on this exciting new venture.

HN/RM/nm

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

October 21, 1992

LETTER OF UNDERSTANDING

Dear Mr. Meyer;

I am writing to confirm that 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."^{7, 8}

The Jewish community of Milwaukee has established a ~~Milwaukee Association for Jewish Education~~ ^{Jewish Education Task Force}. The community views the Lead Communities Project as an opportunity to

.....
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.

→ ~~to~~ Create ^a Vision and
frame Milwaukee's agenda for Jewish Education for the 1990's, to gain a
broad base of support and participation ~~and~~, to implement a plan that
improves the overall quality of what is offered ^{and that address some ques} and to facilitate new initiatives
in areas that address Jewish continuity concerns.

⁷ A Time to Act (University Press of America, Lanham, Md., 1990), p. 17; see also pp. 67 - 69.

⁸ See also Lead Communities: Program Guidelines (January, 1992) pp. 7-11.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

↳ October 27 (?) - date of approval?

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 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 ~~Milwaukee Association for Jewish Education~~ 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, ~~and tentative conclusions~~.

Jewish
Education
Task Force

We believe that the timeline may be unrealistic given where we currently are.

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.⁹

The plan and the action program will be completed by May 31, 1992. 1993

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.

Adapting and introducing

consider

- 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.

⁹ See Appendix A for a brief description of some of the possible areas of content of a Lead Communities Plan.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

- 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. who pay?

The Lead Community agrees to:

- Establish a ~~Lead Community Committee~~ ^{Commission on Jewish Education} to direct the project. The ~~Committee~~ ^{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 ~~Committee~~ ^{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 ~~Director~~ ^{Coordinator} to staff the ~~Lead Communities Committee~~ ^{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 (e.g. the Planning Director of Federation and the Director of the BJE) are expected to be ~~fully involved in~~ ^{active participants} the process.
- Prepare a five-year plan, and annual action programs (as described above).
- Appoint a Lead Communities ~~Director~~ ^{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.
- ~~Build the profession of Jewish education, and thereby address the shortage of qualified personnel.~~ ^{Address the building of the}

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

- 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: _____

> Work to maintain and expand the aggregate communal resources devoted to Jewish education - While it is recognized that ~~the~~ Milwaukee already allocates a higher percentage of ^{an} annual Campaign to Jewish education than most other communities, the Commission on Jewish Education ^{of the A. J. 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.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

(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)

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

Honorary Chair
Max M. Fisher

Chair
Morton L. Mandel

Vice Chairs
Charles H. Goodman
Neil Greenbaum
Matthew J. Maryles
Lester Pollack

Executive Director
Arthur Rotman

Chief Education Officer
Dr. Shulamith R. Elster

November 17, 1992

Mr. Richard H. Meyer
Executive Director
Milwaukee Jewish Federation, Inc.
1360 N. Prospect Avenue
Milwaukee, WI 53202

Dear Rick:

Thank you for your memorandum of November 2nd regarding the Letter of Understanding. We at CIJE are delighted at the response of the Milwaukee community as reflected in your memo and at the GA last week. I have asked Jack Ukeles to work with Howard Neistein to move us towards closure on the document. He will be hearing from Jack this week.

It was good to see you last week and I am looking forward to working with you on the Lead Communities Project.

Sincerely,



Art Rotman

Council for Initiatives
in
Jewish Education

Date sent:

Time sent:

No. of Pages (incl. cover):

13

To: Alan D. Hoffmann

From:

Ginny Levi

Organization:

CIJE/Israel Office

Phone Number:

011972 2 617 418

Fax Number:

011972 2 619 951

Phone Number:

216-391-1852

Fax Number:

216-391-5430

Comments:

Alan -

There are various drafts in the file. I'm sending you 2 versions: 1 marked up by Milwaukee and the latest draft. Nothing happened, per the file, after 1/93.

Ginny

If there are any problems receiving
this transmission, please call:

216-391-1852

F
A
X

C
O
V
E
R

S
H
E
E
T



MILWAUKEE JEWISH FEDERATION

1 9 0 2 - 1 9 9 2

*recognizing 90 years of service to
the Jewish community*C. A. H. H. H. H. H.
J. U. K. E. S.
S. E. L. S. T. A. R.
S. G. R. A. T. I. A. D.

MEMORANDUM

TO: Art Rotman

FROM: Richard Meyer

DATE: November 4, 1992

RE: Milwaukee's Participation in the "Lead Communities" Project

I am pleased to inform you that our Federation Board of Directors has approved Milwaukee's participation in the CIJE's "Lead Community" Project. As a condition for our participation, we are requesting some changes in the language of the "Letter of Understanding" that was forwarded to us on October 21. I have attached a copy of the proposed changes with the most significant being a revision of the second paragraph on page 4.

Our leadership is committed to the success of the "Lead Community" Project. However, it would be unrealistic for our community to commit to significantly expand communal resources committed to Jewish education at this time. We ask that you be sensitive to the decline in our Campaign achievement over the last two years and to acknowledge our already high proportion of resources allocated to Jewish education. We therefore request that the paragraph on page 4 to be revised as follows:

- "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."

We await hearing from you further on this revision or any of the other language changes in the attached document. We look forward to working with you on this exciting new venture.

HN/RM/nm

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

October 21, 1992

LETTER OF UNDERSTANDING

Dear Mr. Meyer;

I am writing to confirm that 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."^{7, 8}

Jewish Education Task Force

The Jewish community of Milwaukee has established a ~~Milwaukee Association for Jewish Education~~. The community views the Lead Communities Project as an opportunity to

.....

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.

→ *to Create a Vision and frame Milwaukee's agenda for Jewish Education for the 1990's, to gain a broad base of support and participation and, to implement a plan that improves the overall quality of what is offered and to facilitate new initiatives in areas that address Jewish continuity concerns.*

⁷ A Time to Act (University Press of America, Lanham, Md., 1990), p. 17; see also pp. 67 - 69.

⁸ See also Lead Communities: Program Guidelines (January, 1992) pp. 7-11.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

→ October 27 (?) - date of approval?

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 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 ~~Milwaukee Association for Jewish Education~~ 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, ~~and program ideas and tentative conclusions~~.

Jewish
Education
Task Force

{ we
believe
that th.
timeline
may be
unrealist.
given
where we
currently
are.

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.⁹

The plan and the action program will be completed by May 31, ~~1992~~ 1993

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.

consider

- 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.

⁹ See Appendix A for a brief description of some of the possible areas of content of a Lead Communities Plan.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

- 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. (who pays?)

The Lead Community agrees to:

- Establish a ~~Lead Community Committee~~ ^{Commission on Jewish Education} to direct the project. The ~~Committee~~ ^{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 ~~Committee~~ ^{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 ~~Director~~ ^{Coordinator} to staff the ~~Lead Communities Committee~~ ^{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 (e.g. the ~~Planning Director of Federation and the Director of the BJE~~) are expected to be ~~fully involved in~~ ^{active participants} in the process.
- Prepare a five-year plan, and annual action programs (as described above).
- Appoint a Lead Communities ~~Director~~ ^{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.
- ~~Build the~~ ^{Address the building of the} profession of Jewish education, and thereby address the shortage of qualified personnel.

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.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

- 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: _____

> Work to maintain and expand the aggregate communal resources devoted to Jewish education - While it is recognized that the Milwaukee already allocates a higher percentage of annual Campaign to Jewish education than most other communities, the Commission on Jewish Education 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.

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

(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

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 • 183 Third Avenue #12B • New York, NY 10003
tel: (212) 532-1861 • 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: _____