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Milwaukee, Wis. Meetings. Correspondence and notes,
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Milwaukee
Launch

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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

MEMORANDUM

TO: Jack Ukeles
Roberta Goodman

DATE: September 21, 1992

FROM: Shulamith Elster

SUBJECT: Agenda for Milwaukee - Update *

9:20 a.m. Flight arrives in Milwaukee; We will be met by Howard Neistein/Federation Planner.

10:30 a.m. ? (or possibly at noon) Meeting with Richard Meyer, Howard, regarding draft of memorandum of understanding and other staff concerns.

11:30 a.m.-
12:15 p.m. Meeting with Roberta Goodman

Lunch with Howard and Roberta

1:30 p.m. Meeting with Lay leadership*
Two agenda items:

- Memorandum of Understanding
- Introduction of Field Researcher

Lay leadership: Steve Richmen (Fed. President), Louise Stein, Rick Marcus, Joan V, and Rabbi Terry Bookman (* Jack to leave in time for his 3:30 p.m. plane)

Memorandum of understanding will be first agenda item along with general update on the Lead Communities Project

Following the 1:30 p.m. meeting Howard has set aside time to meet with Roberta and me to provide background and other information about the community.

I will be staying on to meet with Zachary Harris and Daniel Bader of the Bader Foundation.

* Subject to revision!

Enclosures were sent to Milwaukee

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Memorandum

TO: CIJE Staff and Consultants
FROM: Shulamith Elster *SE*
RE: Milwaukee: March 23-24, 1993
DATE: March 25, 1993

1. Barry and I travelled to Milwaukee for two days of site visits and meetings with the professional and lay leadership of the Lead Communities Project.

The visits included three separate planning meetings with the local co-chairs Louise Stein and Jane Gellman and staff members Howard Neistein and Ruth Cohen. Two of these took place on Tuesday and the third on Wednesday morning the latter was primarily with Barry regarding the exciting pilot project (about which you will hear more) - during which I was on the staff telecon.

We visited a Reform supplementary school and met with the educational director and Rabbi. I thought this particularly important as we were developing plans for a pilot project focusing on supplementary schools/Best Practices.

There was a luncheon meeting with the current and incumbent directors of the Milwaukee Association for Jewish Education to work out the relationship between the LC project itself, our specific pilots and the central agency. This helped to ease some tensions and to clarify a role for the agency.

We visited two of the day schools- one specifically at the request of the Bader Foundation. Zachary Harris joined us on this visit.

Finally, we meet with the JCC executive and his top assistants to think through with them now their proposed programs and newly funded (also by Bader Foundation) position in family education could join our LC work. Zachary Harris also participated in this meeting.

There will be opportunities to amplify this brief overview in the next few weeks as Barry, in particular, reports on the development of the pilot project.

2. Ruth Cohen will be coming to Baltimore on Monday for the Educator Survey consultation. The dates for the May seminar have been given to the community and we can expect Howard Neistein, Ruth Cohen and Louise Stein and Jane Greene to come. I will "collect" their agenda items and forward them for our consideration.

The Milwaukee staff will be developing a memorandum/minutes of our meetings and I will forward this when it is ready.

Follow-up and for staff discussion:

1. The leadership would like to have Annette in her capacity as the Project Director visit the community and have Danny Maron come for consultations about the goals/Educated Jew Project.

2. There is concern about how the MEF project will contribute through the feedback loop- to plans now being made for both the work of the Commission and the pilot projects. This is an issue that I brought up in the telecon earlier this week. Louise Stein: "It is now six months into the project and we haven't heard anything!"

3. Regarding the goals project, they would like to know more (Jane Greene, particularly) about what happened at the consultation in Mexico and how that experience can inform the work being now undertaken and planned for in Milwaukee?

Attachment: Schedule of specific meetings held on March 23th and 24th.



MILWAUKEE JEWISH FEDERATION

1 9 0 2 - 1 9 9 2

*recognizing 90 years of service to
the Jewish community*

FEB 15 1993

February 10, 1993

Virginia Levi
Industrial Foundation
4500 Euclid Ave.
Cleveland, OH 44103

Dear Ginny:

We are looking forward to your visit on Monday, February 22 and to talking with you further about how we can work together to ensure the success of the "Lead Community Project". Listed below are some of the items we would like to discuss.

1. Planning materials: At our November meeting in New York, we discussed a number of materials that would be available to Lead Communities to assist in planning for the project, data gathering and interpreting the project to the community (e.g., planning guide, educator survey, press releases, evaluation measures). Thus far, we have not received any of these and are concerned that the usefulness of some of these pieces is limited to specific stages in the organization process.
2. Consultation: We were told during the application process that a pool of resource people could be available to our community to lend their expertise to improve our education services and serve as resources to our schools and agencies. Who are these resource people? How will this process be managed/paid for?
3. While we were fortunate in receiving a one year grant to hire a Lead Project Director, there are a number of items we need funding assistance for to get the project going. What flexibility is there in receiving some assistance from CIJE?
4. While we recognize CIJE is not in itself a foundation, we were told that a number of national foundations would consider initial funding for initiatives as they begin to develop. What is the financing plan that you envision and what kind of communication is there with participating national foundations?

Virginia Levi
February 10, 1993
Page 2

5. How do the different components of the "Lead Community Project" interrelate (e.g., Monitoring and Evaluation, Best Practices, Funding, Consultation and Training)? How do you envision the three communities will working together?
6. During our application process we discussed a "Letter of Understanding" that would spell out CIJE's and Milwaukee's expectations and responsibilities. This is important not only in establishing our partnership, but also in interpreting the project to our community leadership. We responded to a draft by mailing our comments to Art Rotman to finalize the agreement. Where are we with this document at this time?

With Shulamith Elster's help, we have made a great deal of progress in the last two months which we are eager to share with you. However, the work has only just begun and we shall need your help to sustain enthusiasm among our various constituents.

I shall look forward to meeting with you on February 22. Let me know your flight arrival time and I shall meet you at the airport.

Sincerely,



Howard Neistein
Community Planning Director

HN/nm

COUNCIL FOR INITIATIVES IN JEWISH EDUCATION

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Arthur Rotman

Chief Education Officer
Dr. Shulamith R. Elster

February 11, 1993

Mr. Howard Neistein
Milwaukee Jewish Federation, Inc.
1360 N. Prospect Avenue
Milwaukee, Wisconsin 53202

Dear Howard:

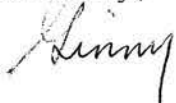
It was good to talk with you earlier this week. I hope I helped to clarify the purpose of the meeting scheduled for February 22. Basically, we want to find out how CIJE can be helpful to Milwaukee, especially where your goals and ours for building the profession of Jewish education and mobilizing community support coincide.

Enclosed is a document entitled "Lead Communities at Work" which may be helpful to you and your colleagues as you plan for the February 22 meeting. Please note that this is not a final document, but one that should serve as a good basis for discussion.

A draft planning guide is in the final stages of production and should be ready to be mailed by the end of this week.

I look forward to seeing you in Milwaukee later this month. If you have any questions, feel free to call me at (216) 391-8300.

Cordially,


Virginia F. Levi

Enclosure

Fax Memorandum

TO: Howard Neistein and Ruth Cohen
copies to :Annette Hochstein
Steve Hoffman
Ginny Levi
FROM: Shulamith Elster
RE: Milwaukee Visit: February 22, 1993
DATE: February 19, 1993

Dear Howard and Ruth,

Thank you for your very helpful conversations in anticipation of the visit to Milwaukee next Monday. The following agenda will, I believe, cover the topics of concern to you and move forward our mutual agenda.

Introductions


Next Steps in the CIJE/Milwaukee Partnership
Update on Milwaukee
CIJE As a Resource
Planning Guide
Best Practices
Monitoring, Evaluation and Feedback Project

The Joint Work Plan

I will assume that you will provide the update to Steve, Annette and Ginny on Monday. I look forward to seeing you both at the meeting next Thursday night. I will be flying to Milwaukee with Daniel Bader who will be attending the CIJE meetings in New York on Thursday.

Shabbat Shalom!

Shulamith



MINUTES: Milwaukee Meeting

DATE OF MEETING: February 22, 1993

DATE MINUTES ISSUED: February 26, 1993

PARTICIPANTS: Milwaukee: Ruth Cohen, Jane Gellman, Rick Meyer,
Howard Neistein

CIJE: Annette Hochstein (by telephone),
Stephen H. Hoffman, Virginia F. Levi

COPY TO: Shulamith Elster, Morton L. Mandel, Arthur J.
Naparstek, Henry L. Zucker

I. Change in Leadership

Steve opened the meeting by explaining the change in leadership for CIJE. He indicated that Henry Zucker will serve as executive director, that he (Steve) will oversee process relationships, and that Annette Hochstein will direct content issues from Jerusalem with regular contact via telecon and visits. Shulamith Elster continues in the role of chief education officer, Barry Holtz is managing the Best Practices project, and Adam Gamoran and Ellen Goldring are working with the field researchers on the monitoring, evaluation and feedback project. Ginny Levi is working with Henry Zucker in a coordinating role.

In general, Milwaukee should continue to contact Shulamith Elster with questions or concerns, with Steve Hoffman available for issues relating to community organization and planning.

II. Milwaukee Set-Up

Ruth Cohen will serve as the primary point person in Milwaukee. The lay leaders of the project, Jane Gellman and Louise Stein, are directly involved with the project and wish to stay in close touch with CIJE. They should be invited to participate in seminars, as should Ruth Cohen and Howard Neistein.

Milwaukee has an active steering committee in place and has now established a broad-based commission which is scheduled to have its first meeting on February 25. They are looking to CIJE for assistance in moving forward. A first step will be to prioritize issues and establish task forces by early March. It is probable that there will be task forces to work on personnel development and strategic planning in addition to one or two other areas.

III. CIJE Resources

A. Educators Survey

In moving ahead in the personnel area, Milwaukee intends to conduct an educators survey relatively soon. CIJE will assist by making available expert advice, providing existing materials--examples of surveys which have been conducted elsewhere--and responding to drafts of survey instruments.

It was suggested that Milwaukee seek the assistance of an experienced local social scientist to conduct the study and offer methodological guidance.

It was noted that the designation of Milwaukee as a Lead Community has raised expectations within the community for both the quality and quantity of work that will be undertaken on behalf of Jewish education. Milwaukee intends to rise to these expectations and anticipates finding local support in the future. However, there is concern about the ability to get started. CIJE is available to help Milwaukee try new approaches which meet these high expectations. It was stressed that the process should be a partnership, with Milwaukee bearing responsibility for identifying local needs and resources.

B. Financial Support from CIJE

It was noted that CIJE is intended primarily as a resource of staff and consultant expertise on content. CIJE has developed tools (e.g. the Best Practices project), has access to experts and institutions nationally and internationally, and is available to match those experts to Milwaukee's needs. In addition, CIJE is prepared to set aside \$20-30,000 over the next 12-18 months to support Milwaukee as it moves through the planning phase. It was suggested that these funds might be used to attract matching funds to support the project or to fund individual initiatives of the launching process. This support will not be conditional upon a match, however.

The expertise of consultants and staff already working with CIJE is available to Milwaukee at no cost. This includes Barry Holtz and the Best Practices project, Roberta Goodman and the monitoring, evaluation and feedback project, Shulamith Elster, Steve Hoffman, Annette Hochstein, etc.

IV. Access to National Foundations

CIJE is working to develop the support of national foundations for projects in the Lead Communities. In response to a question about what the foundations' priorities are, it was suggested that

Milwaukee work to set its own priorities after which CIJE will help in linking those with foundation support, rather than determining the communities' priorities on the basis of potential support.

It was suggested that when plans and programs are designed, the community should involve local lay leadership and seek their help in identifying financial support. A strong local base of support will be critical when national support is sought.

Shulamith Elster will serve as the liaison to CIJE development efforts. She will work with Art Naparstek, a CIJE consultant on foundation grant development.

It was noted that another source of national support for local action is available through Hebrew Union College, Jewish Theological Seminary, and Yeshiva University as well as the JCC Association, the Melton Center at Hebrew University, and the Jerusalem Fellows program. CIJE is working with each of these institutions to offer individual programs or training to respond to local community needs. For example, the Melton Center for Jewish Education in the Diaspora at the Hebrew University is prepared to consider appropriate candidates from Lead Communities in its year-long senior educator program in the year '93-'94 and help tailor the training to the needs of the specific positions to be filled. Significant stipends are available for most programs.

The first step in using this resource is to initiate a dialogue between the community and representatives of the training institutions. Once individual needs have been identified, a way to meet those needs can be developed. CIJE will help broker the relationship.

V. Letter of Understanding

It was suggested that a letter outlining the roles and responsibilities of CIJE and Milwaukee would be more useful following further dialogue and exchange of views. It was agreed that there should be additional meetings of CIJE staff with Milwaukee and jointly with all three Lead Communities in an effort to identify mutual goals and expectations. With this in mind, Jane Gellman and Annette Hochstein will speak in Jerusalem during the week of March 8.

VI. Local Commissions

In response to a question about the breadth of representation on the local commission, a chart was presented which shows that the commission is broadly representative. It was suggested that synagogues be represented not only by people from the education field, but by rabbis and top leaders. The process of bringing the synagogues along is critical to later implementation. Steve shared

the Cleveland experience, noting that one-on-one meetings with rabbis as well as clear involvement of top lay and professional leadership of the federations are critical to moving the process forward. It was also suggested that the heads of the denominational movements may be available to encourage involvement of local rabbis.

VII. Goal Setting

It was noted that CIJE wishes to work with each community on advancing the community's own vision and goals for Jewish education. Milwaukee has begun the "visioning" process and is beginning now to clarify goals. Work being undertaken at the Mandel Institute may be helpful to Milwaukee. Annette will try to put Ruth in touch with Danny Marom at the Mandel Institute to discuss ways in which this might be helpful.

VIII. Monitoring, Evaluation and Feedback Project

It was noted that field researchers were placed in the communities early in the process in order to collect baseline data. The long-term results should be to provide feedback to Milwaukee while also providing CIJE with information which should be useful in carrying this project beyond the three Lead Communities. An initial report had originally been scheduled for January, but because the project has unfolded more slowly than originally expected, we now expect the first report in late spring.

Ruth has submitted a proposal for involving Roberta in local research. She can expect a positive response to that proposal within a week.

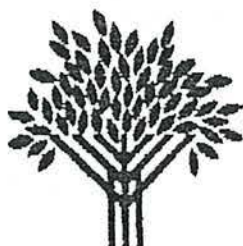
The field researchers will not be able to evaluate each individual project undertaken in the Best Practices area. However, they will be available to help design instruments and methods to carry out such evaluation.

IX. Planning Guide

Milwaukee has found the planning guide useful, especially in providing concrete examples. Howard and Ruth will review it more closely and let Shulamith know if there are ways it should be changed.

X. Future Meetings

No date was set for another meeting, but it was agreed that it would be useful to bring CIJE and Milwaukee representatives together to continue the dialogue. The wish to meet with all three communities was reiterated.



MILWAUKEE JEWISH FEDERATION

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*recognizing 90 years of service to
the Jewish community*

March 12, 1993

Dr. Shulamith Elster
6424 Needle Leaf Dr.
Rockville, MD 20852

Dear Shulamith:

We are looking forward to you and Barry Holtz visiting Milwaukee on Tuesday and Wednesday, March 23 and 24. The agenda for these two days is as follows:

Tuesday, March 23

- 9:00 - 11:30 a.m. - Meeting with Jane Gellman, Louise Stein, Howard Neistein and Ruth Cohen (Room 218-JCC)
- Noon - 1:30 p.m. - Lunch with Dr. Joshua Chorowsky, Ina Regosin and Ruth Cohen (Anchorage Restaurant)
- 3:30 - 5:00 p.m. - Visit Congregation Sinai - Supplementary School
- 6:30 - 8:00 p.m. - Dinner with Ruth Cohen, Jane Gellman, Louise Stein and Howard Neistein

Wednesday, March 24

- 8:00 - 9:30 a.m. - Breakfast with Louise Stein, Jane Gellman, Ruth Cohen and Howard Neistein
- 10:00 - Noon - Visit Yeshiva Elementary School
- 12:30 - 2:00 p.m. - Lunch with Ruth Cohen
- 2:30 - 4:00 p.m. - Visit Milwaukee Jewish Day School
- 4:15 - 5:15 p.m. - Meeting with Jay Roth, Executive Director, JCC, Howard Neistein, Jane Gellman, Louise Stein and Ruth Cohen (Room 218-JCC)

Dr. Shulamith Elstar
March 12, 1993
Page 2

The Jewish Community Center has just received a two year grant from the Helen Bader Foundation to start a family education/staff development program. Jay would like to discuss his plans with you and get your input. A copy of the proposal is enclosed.

I am looking forward to seeing you on March 23.

Sincerely,

Ruth Cohen

Dr. Ruth Cohen
Director, Lead Community Project

RC/nm

enclosure

cc: Barry Holtz



Memorandum

TO: CIJE Staff and Consultants
FROM: Shulamith Elster *de*
RE: Milwaukee: March 23-24, 1993
DATE: March 25, 1993

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Follow-up and for staff discussion:

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2. There is concern about how the MEF project will contribute through the feedback loop to plans now being made for both the work of the Commission and the pilot projects. This is an issue that I brought up in the telecon earlier this week. Louise Stein: "It is now six months into the project and we haven't heard anything!"

3. Regarding the goals project, they would like to know more (Jane Greene, particularly) about what happened at the consultation in Mexico and how that experience can inform the work being now undertaken and planned for in Milwaukee?

Attachment: Schedule of specific meetings held on March 23th and 24th.





DATE 6/1/93

PAGES 8

FROM THE FAX OF

NAME Daniel Pekarsky

FAX (216) 464-5827

PHONE (216) 464-4050

TO THE FAX OF

NAME Seymour Fox

COMPANY _____

FAX () 011-972-2-619-951 PHONE () _____

MESSAGE

Here are two overlapping documents. The short one is intended primarily for you. The longer one could conceivably be circulated, depending on your assessment of its accuracy and usefulness. I haven't thus far passed these pieces on to anyone else, I look forward to hearing from you.

MEMO TO: Seymour Fox
FROM: Daniel Pekarsky
RE: Some summary impressions
DATE: May 26, 1993

The longer document summarizes most of my perceptions. Here I want to stress only a few points:

1. I felt the meeting was extremely valuable. They entered with a number of anxieties, and I felt that these were addressed in a very helpful way. Much greater clarity was achieved concerning the role of CIJE, concerning the place of consultants in the process, concerning costs, and concerning the relationship between programmatic and enabling options. I try, in the accompanying document, to summarize my understanding of how these issues were addressed. I hope my recollections square with your own; please let me know if they don't.

2. I would characterize the Milwaukee team as energetic and thoughtful, but also naive with respect to the process they're embarked on. They are, however, aware of some of their naivete and are looking for thoughtful outside input in developing and implementing their plan. #s 3. and 4. below identify two areas in which assistance would be particularly valuable.

3. HIGH PRIORITY: As noted in the attached document, I think they are crying out for help in developing a sensible planning-process, and I think it would be invaluable to offer them substantial and fairly immediate help with this matter. No doubt, with or without CIJE's help they will come up with some planning process, but they are more likely to come up with one that makes good sense sooner if they get some timely help. How to orchestrate the planning process, who should be involved in the process, what are the critical issues that need to be addressed-- all of this could use some thoughtful outside input. I see this as very important.

4. HIGH PRIORITY: As also noted in the longer document, the relationship between the lead community project and existing educational structures in Milwaukee is very unclear. There is mixed support for the project in MAJE, and MAJE was not actively involved in developing the proposal. It is, I believe, vital to address this issue early on in the process. There is a danger of projects that are redundant or at cross-purposes. A good example of the kinds of problems to be anticipated is a series of programs on the subject of family education that MAJE has developed and announced for the coming year, without, to my knowledge, any consultation with the lead community professional and lay leadership.

5. Note that it was left unclear in the meeting whether, at this moment in time, they would contact Holtz or Pekarsky when they wished to communicate needs, requests, or questions to CIJE.

6. Related to 5, whoever the point-person is, it is very important that lead communities be communicated with in a timely way. I sensed some frustration on their part in this area, a feeling that it takes CIJE too long to respond to queries, to deliver on things it says it will do, to pass on important pieces of information, etc. I think they may feel that a lot is happening at the national and international levels that they're not being informed of. From the standpoint of morale as well as of effectiveness, timeliness and clarity of communication is probably very important at this stage.

7. I will be in Israel during the month of July and will be back in Wisconsin in August. I probably could make some time available in August to come to Milwaukee. As we've discussed, I am hopeful that we'll be able to discuss these matters further while I'm in Israel.

I hope you find this helpful.



MEMO TO: Seymour Fox

FROM: Daniel Pekarsky

RE: SOME IMPRESSIONS BASED ON OUR CONVERSATIONS IN MILWAUKEE, MAY 21, 1993.

DATE: May 23, 1993

Viewed as an attempt to further clarify a) what it means to be a lead community, and b) the relationship between CIJE and Milwaukee, this meeting was very successful. The level of concern, which was very high when we walked in to the meeting seemed considerably reduced by the time we left in the middle of the afternoon. This was due to several inter-related circumstances: a) the attainment of greater clarity concerning heretofore unclear matters; b) resolution of these matters in a direction that was comfortable for the participants; c) their growing sense that, via Pekarsky, Holtz, and others, they would have help with their efforts to develop and implement their plan.

Below a) I summarize some of the major issues raised, along with the responses that were offered, and b) I suggest some matters that need to be addressed in the near-future.

1. THE DANIEL BADER FOUNDATION

The Milwaukee team knew that Seymour was to meet with Daniel Bader. They stressed their own local dependence on his foundation's philanthropic generosity and expressed their concern that Seymour might refocus his philanthropic energies away from local and towards national concerns. Seymour reassured them in no uncertain terms that he had no such intention.

2. THE PLACE OF ENABLING AND PROGRAMMATIC OPTIONS IN THE CIJE PROJECT.

This discussion was a continuation of the conversation in Cleveland the week before. At the Cleveland meeting, some of the lead community representatives seemed caught by surprise by the statement that lead-communities were to be primarily concerned with enabling options (personnel, mobilization of community support). A week later in Milwaukee, this matter was further clarified. Relevant points include the following:

a) It was agreed by everyone that if there was confusion on this matter, it was in part due to some of the CIJE literature on lead-communities, some of which seemed much more focussed on programmatic than on enabling options.

b) Over the last several months, Milwaukee has sensed very interest in the family education area, as measured, in part, the willingness of rabbinic and other leadership to find time to around this issue. They sense that family education is an that will engage the energies of local lay leaders and ssional educators -- much more so, they feel, than other areas "personnel." For this reason, and in the absence of clear mation from CIJE that programmatic options were not central to nterprise, the Milwaukee team has moved in the direction of g family education an important component of its lead nity efforts. For pragmatic and possibly other kinds of ns, they are - whether wisely or not I'm not sure - resistant e idea of giving up this focus.

c) Against the background of a) and b), there was a very ful discussion of the way enabling and programmatic options ogether in the CIJE conception: The enabling option remain ry because in a variety of respects they are the foundation, quisites to the success, of all programmatic options. der, for example, all the curricula that have failed because e unavailability of the right kind of personnel.

HOWEVER, this emphasis on the enabling options should not be ppreted as lack of support for the development of programmatic ns. For attention to programmatic options will inevitably, and rably, play a critical role in the concrete development of ing options. EXAMPLES:

1. although there may well be some general characteristics that one would want to nurture in educators, no matter what their particular domain or approach, specification of a particular programmatic area (e.g. early childhood education, family education, etc.) and attention to effective pogrammatic strategies in that domain may well help to guide the direction of a community's efforts at personnel development. It may help to bring into focus the kinds of theories, skills, and personality characteristics the desired educator should have.

2. Some programmatic options may well have the capacity to generate the kind of community support for, and engagement in, Jewish education that CIJE believes so critical.

It is, though, critical that the tail not wag the dog, and lead communities not forget the pre-eminent importance of the ing options. Negatively, this means not allowing any given rammatic option to replace the enabling options as the center-e of the effort. Positively, it means looking at any given rammatic option with an eye towards its implications for the lopment of enabling options.

It emerged in this discussion that although certain rammatic options, for example, family education, have broad al, their very meaning and their educational merit are, at best

uncertain. In such cases, lead communities have the responsibility to subject them to critical examination, so as to uncover competing interpretations of the options, to understand the implications of each interpretation, etc. It is important to avoid prematurely jumping from rhetoric to implementation. The fact that such programmatic options have a broad intuitive appeal should not stand in the way of this kind of critical analysis. Indeed, inviting interested parties to reflect jointly on the meaning of a particular option (like family education) could inaugurate important conversations that will clarify their educational thinking and may offer them some criteria for assessing educational alternatives put before the community.

3. THE ROLE OF CONSULTANTS/EXPERTS IN THE CIJE PROCESS

While insistent that ultimately it is the local team that needs to decide which visions should guide them and which way to go, the Milwaukee team expressed a need to have the advice of outside consultants/experts. But it voiced considerable uncertainty concerning the place of such consultants/experts in the CIJE process. In response to questions posed and in the course of the discussion, the following points were made:

- a. Lead communities are not expected to pay for the educational and planning input that goes into their various projects. The time and energy of the CIJE professionals, of the Mandel Institute's staff and leadership and of other professionals (like Pekarsky) are made available to lead communities free of charge and on a regular basis. The human resources of the major denominations (who may prove invaluable to local communities in thinking about goals) will also be made available to lead communities free of charge. Also available free of charge are the results of Mandel Institute projects (like "the educated Jew" project) and the professional time of educators who will lead content-seminars. Other resource persons associated with the CIJE process (like Professors Greenberg and Brinker) may also be available to lead communities, though not on a regular basis. Still other consultants may be made available to lead communities based on a determination of special and specific needs.
- b. In general, lead communities will not be invited to identify and hire their own consultants, then passing the cost on to CIJE. Rather, in the typical case, the local community will identify a need and request help from CIJE in identifying an appropriate consultant.
- c. Milwaukee can count on the ongoing involvement of Pekarsky and Holtz in developing its project. Though no specific arrangements were decided upon, it was suggested that Pekarsky, being near-by, might come into Milwaukee two or three times a month, as well as be available for phone-consultations. Some possible roles envisioned for Pekarsky included the following: help with conceptualizing the

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planning process; help with identifying strategies for addressing issues of goals/vision; help in thinking about structural issues (for example, the relationship between the CIJE process and the work of MAJE); help in thinking about personnel development; help in identifying resource-people who might be of value to Milwaukee, especially from within the UW community; and/or help in facilitating communication between the local community and the CIJE national and international staff.

d. It was noted that the University of Wisconsin may well be a source of valuable consultative help for the Milwaukee project.

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The discussion of consultants was connected to a discussion of costs to be incurred, respectively, by CIJE and lead communities. While it was noted that CIJE would be responsible for consulting costs as noted above, it was also stressed a) that local communities would be responsible for the cost of bringing its people to CIJE programs (e.g. meetings of lead community representatives, content-seminars, etc.), and b) that while CIJE will pay for the analysis of the Educator Survey, the local community is responsible for executing it.

It was stressed that CIJE's primary role is not to be a provider of money. Although CIJE will certainly absorb various costs, its primary role is a) to provide consultation and content seminars that can help interpret and guide the project; b) to be a matchmaker between foundations and local communities; c) to conduct a variety of pertinent research activities and to make their results available to local communities; and d) to offer lead communities the services of the CIJE professional staff on an ongoing basis.

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During this discussion, various strategies were discussed, including the following: a) finding a way of encouraging University of Wisconsin students into the field, either as career moves or for short-term assignments during or after college; b) identifying rising-stars in whom it would be wise to invest and developing appropriate educational vehicles for encouraging their growth; c) developing career ladders. In the course of this discussion, Seymour Fox discussed the possibility of allocating Melton funds towards study in Israel for promising lead community educators.

7. HELP WITH PLANNING

While eager to chart a path that reflects its own priorities, The Milwaukee team is open to and, indeed, solicitous of help from knowledgeable outsiders in areas that pertain to substance and to process. They especially expressed a very

immediate need for advice and guidance in conceptualizing and implementing their own planning process. Help in identifying the relevant issues, the partners to the planning process, and the structure of the process would be very valuable. Some concern was expressed that there may already have been some mis-steps in this area, e.g., through the creation of a possibly unnecessary committee.

8. RELATIONSHIP BETWEEN THE LEAD COMMUNITY EFFORT AND OTHER EDUCATIONAL EFFORTS/STRUCTURES IN MILWAUKEE

The relationship between Milwaukee's federation-based lead community project to other educational structures is, at best, unclear. Its relationship to the activities and personnel of MAJE and of the JCC probably require some fairly immediate attention. There is a danger of educational initiatives - for example, in the area of family education - that may be redundant and/or at cross purposes. There is a need to develop a coordination mechanism.



MEMO TO: Shulamith Elster, Seymour Fox, Annette Hochstein, Stephen Hoffman,
Barry Holtz, Morton L. Mandel, Shmuel Wygoda, Henry L. Zucker

FROM: Virginia F. Levi *VF*

DATE: June 9, 1993

Attached is a summary of the meetings held by Seymour Fox and Daniel Pekarsky in Milwaukee on May 21. This is the memo referred to in our telecon on June 8.



MEMO TO: Seymour Fox

FROM: Daniel Pekarsky

RE: SOME IMPRESSIONS BASED ON OUR CONVERSATIONS IN MILWAUKEE, MAY 21, 1993.

DATE: May 23, 1993

Viewed as an attempt to further clarify a) what it means to be a lead community, and b) the relationship between CIJE and Milwaukee, this meeting was very successful. The level of concern, which was very high when we walked in to the meeting seemed considerably reduced by the time we left in the middle of the afternoon. This was due to several inter-related circumstances: a) the attainment of greater clarity concerning heretofore unclear matters; b) resolution of these matters in a direction that was comfortable for the participants; c) their growing sense that, via Pekarsky, Holtz, and others, they would have help with their efforts to develop and implement their plan. Below a) I summarize some of the major issues raised, along with the responses that were offered, and b) I suggest some matters that need to be addressed in the near-future.

1. THE DANIEL BADER FOUNDATION

The Milwaukee team knew that Seymour was to meet with Daniel Bader. They stressed their own local dependence on his foundation's philanthropic generosity and expressed their concern that Seymour might refocus his philanthropic energies away from local and towards national concerns. Seymour reassured them in no uncertain terms that he had no such intention.

2. THE PLACE OF ENABLING AND PROGRAMMATIC OPTIONS IN THE CIJE PROJECT.

This discussion was a continuation of the conversation in Cleveland the week before. At the Cleveland meeting, some of the lead community representatives seemed caught by surprise by the statement that lead-communities were to be primarily concerned with enabling options (personnel, mobilization of community support). A week later in Milwaukee, this matter was further clarified. Relevant points include the following:

a) It was agreed by everyone that if there was confusion on this matter, it was in part due to some of the CIJE literature on lead-communities, some of which seemed much more focussed on programmatic than on enabling options.

b) Over the last several months, Milwaukee has sensed very great interest in the family education area, as measured, in part, by the willingness of rabbinic and other leadership to find time to meet around this issue. They sense that family education is an area that will engage the energies of local lay leaders and professional educators -- much more so, they feel, than other areas like "personnel." For this reason, and in the absence of clear information from CIJE that programmatic options were not central to the enterprise, the Milwaukee team has moved in the direction of making family education an important component of its lead community efforts. For pragmatic and possibly other kinds of reasons, they are - whether wisely or not I'm not sure - resistant to the idea of giving up this focus.

c) Against the background of a) and b), there was a very fruitful discussion of the way enabling and programmatic options fit together in the CIJE conception: The enabling option remain primary because in a variety of respects they are the foundation, prerequisites to the success, of all programmatic options. Consider, for example, all the curricula that have failed because of the unavailability of the right kind of personnel.

HOWEVER, this emphasis on the enabling options should not be interpreted as lack of support for the development of programmatic options. For attention to programmatic options will inevitably, and desirably, play a critical role in the concrete development of enabling options. EXAMPLES:

1. although there may well be some general characteristics that one would want to nurture in educators, no matter what their particular domain or approach, specification of a particular programmatic area (e.g. early childhood education, family education, etc.) and attention to effective programmatic strategies in that domain may well help to guide the direction of a community's efforts at personnel development. It may help to bring into focus the kinds of theories, skills, and personality characteristics the desired educator should have.

2. Some programmatic options may well have the capacity to generate the kind of community support for, and engagement in, Jewish education that CIJE believes so critical.

It is, though, critical that the tail not wag the dog, and that lead communities not forget the pre-eminent importance of the enabling options. Negatively, this means not allowing any given programmatic option to replace the enabling options as the center-piece of the effort. Positively, it means looking at any given programmatic option with an eye towards its implications for the development of enabling options.

It emerged in this discussion that although certain programmatic options, for example, family education, have broad appeal, their very meaning and their educational merit are, at best

uncertain. In such cases, lead communities have the responsibility to subject them to critical examination, so as to uncover competing interpretations of the options, to understand the implications of each interpretation, etc. It is important to avoid prematurely jumping from rhetoric to implementation. The fact that such programmatic options have a broad intuitive appeal should not stand in the way of this kind of critical analysis. Indeed, inviting interested parties to reflect jointly on the meaning of a particular option (like family education) could inaugurate important conversations that will clarify their educational thinking and may offer them some criteria for assessing educational alternatives put before the community.

3. THE ROLE OF CONSULTANTS/EXPERTS IN THE CIJE PROCESS

While insistent that ultimately it is the local team that needs to decide which visions should guide them and which way to go, the Milwaukee team expressed a need to have the advice of outside consultants/experts. But it voiced considerable uncertainty concerning the place of such consultants/experts in the CIJE process. In response to questions posed and in the course of the discussion, the following points were made:

- a. Lead communities are not expected to pay for the educational and planning input that goes into their various projects. The time and energy of the CIJE professionals, of the Mandel Institute's staff and leadership and of other professionals (like Pekarsky) are made available to lead communities free of charge and on a regular basis. The human resources of the major denominations (who may prove invaluable to local communities in thinking about goals) will also be made available to lead communities free of charge. Also available free of charge are the results of Mandel Institute projects (like "the educated Jew" project) and the professional time of educators who will lead content-seminars. Other resource persons associated with the CIJE process (like Professors Greenberg and Brinker) may also be available to lead communities, though not on a regular basis. Still other consultants may be made available to lead communities based on a determination of special and specific needs.
- b. In general, lead communities will not be invited to identify and hire their own consultants, then passing the cost on to CIJE. Rather, in the typical case, the local community will identify a need and request help from CIJE in identifying an appropriate consultant.
- c. Milwaukee can count on the ongoing involvement of Pekarsky and Holtz in developing its project. Though no specific arrangements were decided upon, it was suggested that Pekarsky, being near-by, might come into Milwaukee two or three times a month, as well as be available for phone-consultations. Some possible roles envisioned for Pekarsky included the following: help with conceptualizing their

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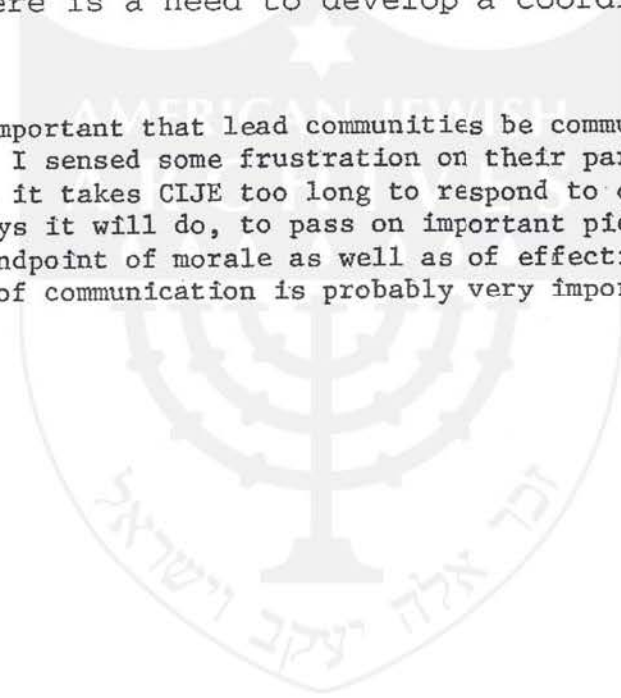
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9. It is very important that lead communities be communicated ^{WITH} ~~within~~ in a timely way. I sensed some frustration on their part in this area, a feeling that it takes CIJE too long to respond to queries, to deliver on things it says it will do, to pass on important pieces of information, etc. From the standpoint of morale as well as of effectiveness, timeliness and clarity of communication is probably very important at this stage.



Date: 02 Feb 94 16:18:17 EST

Milwaukee
file

From: Virginia Levi
To: Alan-Israel
Cc: Gail , Ginny
Subject: Milwaukee telecon

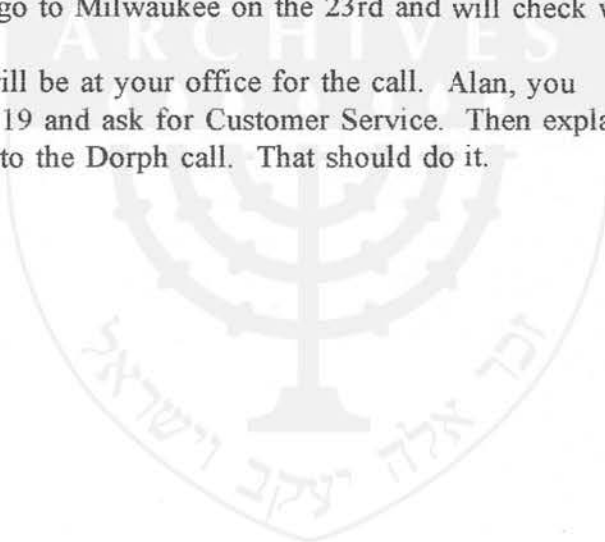
OK. Telecon is scheduled for 4:00 pm Eastern Standard Time on Thurs. Howard was unhappy that we weren't including Jane and Louise. I said it was to discuss processing the the report and Howard laid into me about how he needs more info before he can agree to these conversations. He also was reluctant to include Rick, who isn't into "micromanaging." After he vented, he did agree and put on the calendars of the others. I hope the group isn't too hostile when you speak.

Alan, Steve thought you were going to call him today (Wed.) at 3:30. If you had some other time in mind, let me know and I'll try to set it up.2

Steve is available to go to Milwaukee on the 23rd and will check with Chuck re same.

Gail, I assume you will be at your office for the call. Alan, you should call 205-834-5319 and ask for Customer Service. Then explain that you want to get tied into the Dorph call. That should do it.

Good luck. Ginny



**Talking Points for Telecon with
Rick Meyer, Howard Neistein, and Ruth Cohen
EST 4:00pm Feb 3, 1994**

1. This conversation is professional to professional in advance of the telecon between the Milwaukee Core Team and Betsy Green, Rick Meyer on one side, and Alan Hoffmann, and Gail Dorph on the other, scheduled for next week.
2. Issue is how to process in Milwaukee the forthcoming Educator's Survey and Executive Summary presently being prepared by Adam and Ellen.
3. Concern had been expressed by Betsy Green, Louise and others about how the Milwaukee community would react to the data.
4. CIJE would like to plan together with Milwaukee the process by which the release of the Educator's Survey would have the greatest and most constructive impact on Jewish Education in Milwaukee.
5. We recognize that Milwaukee is the first community to look at itself in the mirror and document what many already know intuitively about the quality and training of Jewish educational personnel. CIJE is there to help the community to take this knowledge and create a personnel action plan which will help create major change in the entire system.
6. We understand that there is a great deal of nervousness about the financial implications of major improvements in Jewish educational personnel, and CIJE is ready to help the community mobilize for this.
7. We propose that a high level CIJE leadership group consisting of Chuck Ratner, Steve Hoffman, Alan Hoffmann, Gail Dorph, Adam or Ellen, meet with Milwaukee Federation and Lead Community leadership as soon as possible in order to think together about how to process this report in the community. This would include moving towards a personnel action plan and mobilizing community resources.
8. We are suggesting late afternoon and evening of February 23, 1994.

For Milwaukee
Jord

Date: 13 Feb 94 17:02:21 EST

From: Gail Dorph

To: adam

Cc: AlanIsrael , Ginny ,
"INTERNET:GOLDRIEB

Subject: policy report for milwaukee

I spoke with Alan earlier today. He feels that you should send this second draft of the policy report to Ruth right away as we promised.

I was not sure if the decision was to revise the present executive summary and present a "stronger" version. So the two of you (Adam and Ellen) need to get back to Alan about your sense of that. Neither of us felt that this necessitated holding back on policy report itself. We need all the folks, coming to our meeting now scheduled in Milwaukee on February 23 in the evening, to read.

Talk to you soon. gail



NEWARK, NOV. 6

Steve Fichman / Tobey Libber

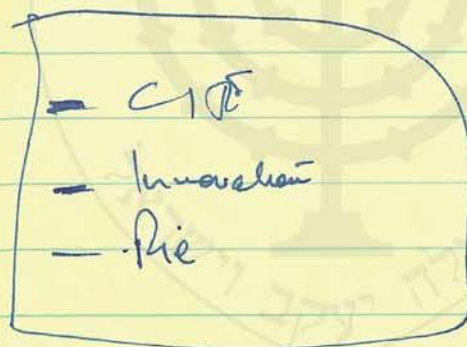
Agenda

1. How best make use of visit on Nov. 6.
within Committee
2. CIP's concept of where L.C. process would go
into Community Process
3. Global Perspective on Central Agency
— Community Commission

Stitchman on revamping of

Main reason for committee:

— STRUCTURE is major thrust



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Marvin Lender
Norman Lipoff
Seymour Martin Lipset
Florence Melton
Melvin Merians
Lester Pollack
Charles Ratner
Esther Leah Ritz
William Schatten
Richard Scheuer
Ismar Schorsch
David Teutsch
Isadore Twersky
Bennett Yanowitz

Executive Director
Alan Hoffmann

**Report on Planning Meeting:
Milwaukee Leadership Development Action Team
June 23, 1996**

TO: Leadership Development Action Team
FROM: Nessa Rapoport; Dan Pekarsky
DATE: July 3, 1996

This consultation took place following a series of meetings on leadership development, resulting from the Lead Community Initiatives Project.

Summary of previous decisions: The program under consideration would be a systematic approach to developing leadership for Jewish education in Milwaukee--not a one-shot workshop or retreat. It would have high entry requirements (including a written application) based on ability, access to decision-making, and commitment. Participants' different levels of knowledge and experience with educational issues will need to be taken into account. To build a knowledge base, there will be a work project undertaken in teams of two from a shared setting. To transmit that knowledge, there will be a mentoring component.

Content: The curriculum would incorporate:

1. Powerful Jewish ideas: It would address such questions as: What are different visions of community in Jewish thought? What is a meaningful Jewish existence in North America? What role can education play?
2. Powerful educational ideas: It would address such questions as: What can educational excellence look like? What are models of visionary ideas and their educational settings in Jewish and general education? What is cutting-edge thinking today about teaching and learning?
3. Powerful ideas about leadership: It would address such questions as: How does Judaism, philosophically and historically, illuminate the role and responsibilities of leaders? How have informed leaders transformed Jewish life? Jewish and general education? What skills are necessary to implement vision?

These elements will be presented in an integrated rather than sequential way.

Context: This pilot program would be a pioneering one, providing a model for other communities interested in mobilizing support for Jewish education. In the landscape of North American Jewish education, there are not currently:

1. A serious, well-developed knowledge base and curriculum to address the question: What does a leader need to know to be an informed champion of Jewish educational change?
2. Ongoing local frameworks within which leaders who serve educational roles (school presidents; synagogue education chairs; community leaders; etc.) could meet their counterparts to augment their learning and forge partnerships for improving Jewish education. These ongoing frameworks also do not exist at a national level.
3. Mechanisms for transmitting acquired knowledge to successors.

Outcomes: In order to describe how Jewish education might be different in Milwaukee as a result of this initiative, we discussed personal experiences of outstanding--or poor--teaching, in Jewish and general education. Among the elements common to teachers who were models of excellence:

1. Comprehensive knowledge.
2. Passion for the material; ability to "make it come alive."
3. Gift for connecting with participants; for stimulating people to think, care, and grow.

What, then, would success look like? We focussed on two questions:

Question 1. What do leaders need to know to make sound, sophisticated decisions about education in institutional or communal settings? What will they be able to do that they cannot do now?

Question 2. If you took a visitor on a tour to Milwaukee to show the successes of Jewish education in the future as a result of this program, what would he/she see?

Among the answers to Question 1.:

A leader who completed this program would:

1. Know how to ask the right questions, and have criteria for good decisions--to judge the merits of a proposed initiative, for example.
2. Have an appreciation for the richness of Jewish learning as a rewarding activity.

3. Have an awareness of the big questions in Jewish life and their relationship to Jewish education: Where are we heading as a Jewish community? Where do we want to be heading? What is our vision of a meaningful Jewish existence?
4. Have the ability to see the relationship between local problems in Milwaukee and larger systemic realities (the severe national shortage of senior personnel in Jewish education; the undertraining of Jewish teachers; etc.)
5. Understand the cost of education and the finances required for excellence.
6. Share a common language about Jewish educational issues with a cadre of peers.
7. Build relationships to encourage cross-setting partnerships to improve Jewish education in Milwaukee.

Among the answers to Question 2.:

A visitor to Milwaukee's Jewish education would see:

1. "A glint in people's eyes!"
2. As few barriers as possible to participation: Everyone should have access to meaningful Jewish education in a range of possibilities. "A friendly, open-door environment."
3. A central address to direct individuals to the experience best suited to their age, interest, need.
4. More dollars available to the enterprise.
5. An environment of institutional cooperation.
6. A clear vision for Milwaukee's Jewish education, being translated into different settings; a system of Jewish education that is part of the real world and not relegated to secondary status; a sense that learning matters.
7. A body of leadership wisdom that is worth passing on.
8. Educational standards in place, both institutionally and communally.
9. A community whose educational needs are met, so that no Jewish person has to leave Milwaukee because of a lack of specific educational opportunities, and, equally, no one feels prevented from coming.

Ultimately, the goal is to create a tradition of leadership in Milwaukee, so that a hallmark of the Milwaukee community will be informed and effective leadership on behalf of always- improving Jewish education.

Criteria for participants:

In a preliminary discussion of criteria for participants, these factors were emphasized in addition to those decisions already taken in previous meetings:

1. A basic knowledge of Judaism, from which to be able to make decisions.
2. The ability to use knowledge in a leadership role; with the goal of "a Jewish approach to solving problems."
3. Good interpersonal skills and a sense of community.
4. Willingness to nurture this process, to "find their own replacements."

Next steps:

Among the issues to be addressed at subsequent meetings are these:

Content:

1. What will be the major themes and questions to be addressed?
2. In light of those choices, on what expertise can we draw?
3. What are the criteria for participants?

Process:

1. Who will be the local coordinator to be proactive in initiating and implementing recommendations?
2. If a partnership between lay people and professional educators is critical for making change, how will that issue be taken into account?
3. What is the application process, with a target of starting the program in the winter of 1977?
4. Funding.
5. Calendar for subsequent meetings.

The next meeting will be organized to take place before the Jewish holidays.