BUILDING JEWISH COMMUNITY

FY 2009-2010 | 5770
REPORT TO THE COMMUNITY
Each year, dedicated community volunteers devote their time and talents to a variety of task forces and committees to enable the Milwaukee Jewish Federation to achieve the strategic goals that guide the organization’s activities and direction. The achievement of these goals enables a successful approach to supporting our Jewish family in Israel, in our national and international communities and here at home.

**CHAIRS OF COMMITTEES**

**Agency Review Council**
Susan Lubar Solvang

**Coalition for Jewish Learning (CJL) Advisory Board**
Jennifer Saber
- Day of Discovery Committee
  Judy Baruch, David Blumberg
- Day School Grant Allocation Committee
  Gwen Rivkin
- Holocaust Education Resource Center Executive Committee
  Harry Pelz

**Community Planning & Allocations Committee**
Mitch Moser, Marlene Lauwasser
- Creative Thinking in Challenging Times
  Marlene Lauwasser

**Finance Committee**
Marcia Taxman
- Audit Subcommittee
  Sanford Mitz
- Budget Subcommittee
  Scott Sampson
- Fiscal Stewardship Subcommittee
  David Werner
- Properties Subcommittee
  Fred Croen
- Investment Subcommittee
  J. Lewis Perlson

**Financial Resource Development Committee**
Betsy L. Green

**Israel & Overseas Committee**
Keith Lindenbaum
- Partnership 2000 (P2K) Advisory Committee
  Melinda Swartz
- Shlichut Program Committee
  Nancy K. Barnett
- Yamim Committee
  Yonatan Zvi

**Jewish Community Foundation (JCF) Board of Trustees**
David J. Lubar
- Endowment Committee
  David J. Lubar
- Grants Committee
  Abigail Nash

**Jewish Community Relations Council**
Judy Kristal

**Jewish Museum Milwaukee**
Marianne Lubar, President
- Archives Committee
  Clarice Resnick
- Development Committee
  Penny Deshur
- Membership Committee
  Barbara Blutstein
- Program Committee
  Jane Cherno

**Marketing Committee**
Linda Marcus

**Volunteer Engagement/Leadership Development Committee**
Susan Stern
- Young Leadership Council
  Rebecca Guralnick, Mitchell A. Nelles

**Wisconsin Jewish Chronicle**
Task Force
Michael L. Green

**AGENCIES, PROGRAMS AND PARTNERS**

**Milwaukee Jewish Federation Programs and Services**
Coalition for Jewish Learning
Israel Center
Jewish Community Foundation
Jewish Museum Milwaukee
Wisconsin Jewish Chronicle

**Milwaukee Jewish Federation Local Constituent Agencies**
BBYO – Wisconsin Region
Harry & Rose Samson Family Jewish Community Center
Hillel Foundation University of Wisconsin (Madison)
Hillel Milwaukee
Jewish Beginnings Lubavitch Preschool
Jewish Family Services
Jewish Home and Care Center
Milwaukee Jewish Day School
The Academy (Hillel)
Yeshiva Elementary School

**Properties Acquired and Managed for the Jewish Community by the Milwaukee Jewish Federation**
Evan and Marion Helfaer Community Service Building
Golda Meir Apartments
Habush House
Hillel Student Center, Joseph & Vera Zilber Building
Lieberman Apartments
Maurice S. Surlow Senior Residences
Max and Anita Karl Jewish Community Campus

**Major National and Overseas Partners**
American Jewish Joint Distribution Committee
Jewish Agency for Israel
Jewish Federations of North America
We are very pleased to present 2009-2010: Report to the Community.

The longstanding mission of our Federation is to provide funding, staffing and support for vital human needs, educational, social and community-building services locally, nationally and internationally in Israel and around the world. This year we take special pride in the completion and approval of our Community Covenant, or Brit Kehillat: an agreement between Federation and our partner agencies. This document provides a clear description of the responsibilities and obligations we each assume as we work together to achieve our mutual goals. By committing to the shared ideals reflected in this Covenant and collaborating in our efforts, we can ensure that succeeding generations will enjoy the fruits of our communal undertaking.

This past year saw other significant signs of progress. We completed a strong Annual Campaign, exceeding last year’s results. The Jewish Community Foundation created many new donor advised funds, and our investment return improved significantly. We welcomed the Jewish Community Relations Council as a core function of the Milwaukee Jewish Federation. We gathered nearly 800 strong to attend the Dead Sea Scrolls exhibit at the Milwaukee Public Museum. Our Women’s Division launched a strategic planning process as we vision for the future. Our agencies brought our community to life with education, celebration and a wide array of programs and services. A key overseas partner, the Jewish Agency for Israel (JAFI), completed a historic reframing of its mission and purpose to focus on ensuring a strong, shared future for Israel and the Jews of the Diaspora.

Lingering effects of the economic downturn forced difficult decisions, as we continued to refine our scope of operations, identify economies and embrace collaboration. And, in May, 2010, we said a sad good-bye to one of our own, long-time Federation Executive and the architect of our Jewish community, Melvin S. Zaret, who left behind an extraordinary legacy of commitment to Jewish values.

We ask you now to reaffirm your commitment to a community of deep compassion, dedication, courage and resilience. And if you’re not now part of our community, we extend a warm welcome for you to join us as we meet the challenges before us and continue to celebrate our lives, our history, our families, our vibrant community, our festivals and our faith.

Respectfully,

Jerry Benjamin, President

Richard H. Meyer, Executive Vice President
Milwaukee Jewish Federation: Building Community and Developing Financial Resources.
In 2009-2010, as we recovered from earlier financial challenges, we strengthened community by gathering, learning, teaching and celebrating together. We helped people in need, upheld our Jewish values, and honored our bonds with Israel.

We completed a $6.9 million Annual Campaign. The Jewish Community Foundation provided more than $1 million for community allocations, and Foundation assets were up 16%. A promising new corporate sponsorship initiative was developed. We presented films, lectures, plays and musical performances. We traveled to Israel and welcomed Israeli visitors to Milwaukee. We gathered in celebration, in support and in remembrance. And we signed Jewish Milwaukee’s first-ever Community Covenant, recognizing that the ties that bind us together are much stronger than any differences that divide us.

Right: Founder of Ethos Water and former Vice President of Starbucks Coffee Company Jonathan Greenblatt delivered a powerful message of social responsibility at the 2010 Annual Campaign Opening Event in October.

Below: In May and June, the Israel Center hosted a visit by the “Cooking Mamas,” women of diverse ethnic roots who live in our Partnership 2000 region of the Sovev Kinneret.

Right: In April we joined Jews around the world in celebrating Israel’s Independence Day with a Walk for Israel. Photo: Dan Zaltz
Milwaukee Jewish Federation
2009-10 Officers

President:
Jerry Benjamin

Vice Presidents:
Frederick R. Croen
Idy Goodman
Betsy L. Green
Moshe Katz
Keith Lindenbaum
David J. Lubar
Mitchell Moser

Treasurer:
Marci Taxman

Secretary:
Scott Sampson

Executive Vice President
Richard H. Meyer

Women’s Division Officers
Idy Goodman
President
Andrea Schneider
2010 Women’s Campaign Chair

Vice Presidents:
Eileen Graves
Dr. Sharyl Paley
Susan Pittelman
Jill Plavnick

Board of Directors
Albert B. Adelman
Craig Adelman
William Appel
Bruce Arbit
David Arnstein
Stan Azimov
Daniel Bader
Nancy Barnett
David Becker
Jerry Benjamin
Joseph M. Bernstein
Nathan Bernstein
Mark E. Brickman
Stephen L. Chernof
Betty Chrustowski
Dr. Judith Coran
Fred Croen
Brad Dallet
James Deshur
Penny Deshur
Gregory Dorf
Stephanie Dykeman
Judith Eigen
Harry L. Epstein
Suzy Ettinger

Nathan Fishbach
Howard Frankenthal
Jennifer Friedman
Jane Gellman
Bruce Glaser
Barbara Glazer
Mark Goldstein
Idy Goodman
Donald Grande
Betsy L. Green
Michael Green
Beverly Greenberg
Todd Gruen
Judy Guten
Robert L. Habush
Rabbi Jacob Herber
James Hiller
Lorraine Hoffmann
Nathaniel Hoffman
Jeanne Jacobs
Marc Jacobson
Gerald J. Kahn
Moshe Katz
Phillip Katz
Judi Ketten

Judy Kristal
Michael Lappin
R. Todd Lappin
Marlene Lauwasser
Keith Lindenbaum
Jody Kaufman
Loewenstein
David P. Lowe
David J. Lubar
Michael Maistelman
David Marcus
Linda Marcus
Felicia Miller
Sanford Mitz
Mitch Moser
Abigail Nash
Mitchell A. Nelles
Laurence Newman
Dr. Sharyl Paley
Arleen Peltz
Beverly Perlson
J. Lewis Perlson
Susan Pittelman
Jill Plavnick
Stephen E. Richman
Lauri Roth

Ali Ruvin
Richard Ruvin
Julie Sadoff
Michael Sadoff
Scott Sampson
Allen L. Samson
Alexander Satanovsky
Karen Schapiro
Andrea Schneider
Jeffrey S. Schuster
Candace Schwam
Diane Seder
Jodi Habush Sinykin
Debra Slater
Amy Berkovits Stein
Gerald Stein
Sue Strait
Melinda Swartz
Marci Taxman
Leslie Usow
Stephanie Wagner
Leslie Usow
Stephanie Wagner
Ruth Wallace
David Werner
Dr. Eric Zall
Melvin S. Zaret

+ 2009-2010 Executive Committee
++ 2009-2010 Officers
* of blessed memory
Moshe Katz
2010 Annual
Campaign Chair

Andrea Schneider
2010 Women’s
Campaign Chair

Bill Appel
Bruce Arbit
Scott Arbit
Diana Azimov
Mariya Basin
Nathan Bernstein
Barbara Blutstein
Mark Brickman
Allan Carneol
Betty Croen

Fred Croen
Brad Dallet
Jim Deshur
Penny Deshur
Dana Emold
Steve Emold
Andrea Florsheim
Zvi Frazer
Jane Gellman
Rosalie Schlitz Gellman
Shel Gendelman
Idy Goodman
Seema Gorens
Barbara Grande
Eileen Graves
Betsy Green
Mike Green
Beverly Greenberg

Rebecca Guralnick
Robert L. Habush
Bonnie Jacobson
Hal Karas
Debra Katz
Jody Kaufman Loewenstein
R. Todd Lappin*
Marlene Lauwasser
Cindy Levy
Betty Lieberman
Joan Lubar
Chip Mann
David Marcus
Greg Marcus
Linda Marcus
Melina Marcus
Susan Angel Miller
Cheryl Moser
Mitch Moser
Mitchell A. Nelles
Dr. Sharyl Paley
Marilyn Pelz
Jill Plavnick

Susan Richheimer
Todd Richheimer
Hilary Richman
Josh Richman
Stephen Richman
Lauri Roth
Dottie Rotter
Mert Rotter
Scott Sampson
Jeff Schuster
Dr. Corey Shamah
Jerry Stein
Marty Stein
Susan Stern
Henry Stern III
Sue Strait
Melinda Swartz
Janice Waisman
Ruth Wallace
David Werner
Yonatan Zvi

Bolded names denote 2010 Campaign Cabinet Advisors.

* = Of blessed memory

The 2010 Annual Campaign achievement includes gifts from more than 3000 generous donors.
Our Young Leadership Division brings together the next generation of Jewish Milwaukee to nurture commitment and leadership skills. The December YLD Latke Vodka event, pictured here, was a great success.


Middle, left: Governor Doyle’s Trade Mission to Israel in November brought Wisconsin leaders to the Sovev Kinneret (left to right): Levana Caro, Partnership 2000 Director for the Sovev Kinneret; Motti Dotan, Head of the Lower Galilee Regional Council; Governor Doyle; Zohar Oved, Mayor of Tiberias; Rick Meyer.

Middle, right: Milwaukee Mayor Tom Barrett spoke to a packed house at the Economic Forum in November.

Left: The “Dead Sea Scrolls & the Bible” exhibit at the Milwaukee Public Museum brought together nearly 800 members of our community in late January.
The Local Partner Agencies of the Milwaukee Jewish Federation: Building Community by Providing Programs and Services. The 10 local partner agencies of the Milwaukee Jewish Federation provide a wide array of essential educational, social welfare, care-giving, family activity and other services that ensure a strong and healthy Jewish Milwaukee community. Federation supports these agencies through local allocations, through funding from the Jewish Community Foundation and through the provision of infrastructure assistance.

Right: Jewish Family Services began construction in summer 2009 on their now complete, 66-unit affordable housing facility, Deerwood Crossing Senior Residences in Brown Deer. Studio, one- and two-bedroom residences give seniors the flexibility to age in place with dignity.

Middle, right: The Milwaukee Jewish Day School curriculum culminates with the annual 8th grade trip to Israel. This photo of our 8th grade students and their teachers was taken in Jerusalem in June, 2010.

Middle, left: BBYO – Wisconsin Region enables area students to maintain a strong connection to the Jewish community as they move through their high school years. Here, BBYO students gather at the Spring Regional Convention.

At the University of Wisconsin (Madison) Hillel students rallied for Holocaust awareness. In 2009-2010 students continued to enjoy their new home, the Barbara Hochberg Center for Jewish Student Life.

Hillel Milwaukee student leaders constructed a new Sukkah at the Hillel Student Center, Joseph and Vera Zilber Building in October. Over the past year, Hillel saw growth in the number of students participating in regular programming.
## SOURCES OF FUNDS

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount</th>
</tr>
</thead>
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<tr>
<td>Annual Campaign 2010</td>
<td>6,927,541</td>
</tr>
<tr>
<td>Jewish Community Foundation</td>
<td>1,005,000</td>
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<tr>
<td>Other</td>
<td>97,014</td>
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</tbody>
</table>

Total Funds Available for Distribution $8,029,555

## COMMUNITY ALLOCATIONS

### Local Agencies, Programs, and Services

<table>
<thead>
<tr>
<th>Agency</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>BBYO – Wisconsin Region</td>
<td>63,830</td>
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<tr>
<td>Coalition for Jewish Learning</td>
<td>252,120</td>
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<tr>
<td>Harry &amp; Rose Samson Family JCC</td>
<td>1,049,400</td>
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<tr>
<td>Hillel Foundation – UW (Madison)</td>
<td>50,400</td>
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<tr>
<td>Hillel Milwaukee</td>
<td>111,830</td>
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<tr>
<td>Interfaith Conference of Greater Milwaukee</td>
<td>10,000</td>
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<td>Israel Center/Partnership 2000</td>
<td>45,380</td>
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<tr>
<td>Jewish Beginnings Lubavitch Preschool</td>
<td>87,600</td>
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<tr>
<td>Jewish Family Services</td>
<td>468,000</td>
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<tr>
<td>Jewish Home and Care Center</td>
<td>19,200</td>
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<tr>
<td>Milwaukee Jewish Day School</td>
<td>463,212</td>
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<tr>
<td>The Academy (Hillel)</td>
<td>221,528</td>
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<tr>
<td>Wisconsin Jewish Chronicle</td>
<td>19,600</td>
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<tr>
<td>Jewish Museum Milwaukee</td>
<td>83,240</td>
</tr>
<tr>
<td>Yeshiva Elementary School</td>
<td>89,060</td>
</tr>
<tr>
<td>Support to cover additional occupancy fees</td>
<td>47,013</td>
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</tbody>
</table>

Total Local Agencies/Programs Allocations $3,081,413

### Israel and Overseas

Overseas Partners:
- Jewish Federations of North America (JFNA)
- American Jewish Joint Distribution Committee
- Jewish Agency for Israel $1,715,868
- Elective and Designated JFNA Overseas Programs 217,332
- Birthright Israel 30,000

Total Israel and Overseas Allocations $1,963,200

## National Allocations

<table>
<thead>
<tr>
<th>Agency</th>
<th>Amount</th>
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<tbody>
<tr>
<td>National Federation Agency Alliance</td>
<td>86,700</td>
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<tr>
<td>Other National Agencies</td>
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<tr>
<td>National Funding Council Dues</td>
<td>2,325</td>
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Total National Allocations $93,025

## Financial Resource Development

<table>
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<th>Program</th>
<th>Amount</th>
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<tr>
<td>Annual Fundraising and Community Outreach</td>
<td>964,341</td>
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<tr>
<td>Jewish Community Foundation</td>
<td>390,495</td>
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Total Financial Resource Development $1,354,836

## Community Organization and Central Services

<table>
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<tr>
<th>Service</th>
<th>Amount</th>
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<tr>
<td>Community Planning</td>
<td>195,197</td>
</tr>
<tr>
<td>Finance and Administration</td>
<td>819,968</td>
</tr>
</tbody>
</table>

Total Community Organization & Central Services $1,015,165

## Other Services and Expenditures

including Shrinkage Reserve and Professional Fees $521,916

## TOTAL COMMUNITY ALLOCATIONS

$8,029,555
Like Federations across North America, in 2009 – 2010, the Milwaukee Jewish Federation worked to recover from earlier financial challenges. We are learning to live with less and to reinvent our community at a level commensurate with our resources. Community allocations for 2010-2011 reflect this cost-effective approach to programs, services and activities.

We are grateful to the MJF Executive Committee and the Officers and Board of Directors for the time, talent and energy they devoted to meeting the continuing challenges of community allocations in this time of tentative recovery.
Kindergarteners at Jewish Beginnings learn and explore, building a strong foundation for their future education.

Rosalie Gellman smiles for the camera at the Chai Point and Lakeside Enrichment Program’s picnic at the Jewish Home & Care Center during summer 2009.

Yeshiva Elementary School students - (l-r) Tova Appel, Menuchah Avruch and Yehoshua Shalom Green – in conversation with Marianne and Sheldon Lubar on a visit to the Jewish Museum Milwaukee. Photo: Judith Eigen.

Kindergarten and first grade students at Hillel Academy shared their knowledge and love of Torah at the 2010 Hillel Academy Torah Fair.

The Harry & Rose Samson Family Jewish Community Center (JCC) established the Jewish Community Garden on June 16, 2010. A wide cross-section of the Milwaukee Jewish community participated in this project, which will teach children about stewardship of the earth and provide fresh produce for the Jewish Community Pantry. Shown here (l-r): Jody Hirsh, JCC Judaic Director; Cathy Goldman, Garden Committee; Jacqueline Goldman; Judy Miller, MJDS Head of School and Max Samson, Congregation Shir Hadash.
The Women’s Division of the Milwaukee Jewish Federation: Building Community through the Power of Women. The Women’s Division continued to set an example of Jewish communal life with high energy and deep commitment. The 2010 Women’s Campaign achieved a total of nearly $2 million. We drew special strength from our Lion of Judah and Pomegranate donors. Political and Jewish Awareness educated women from all sectors of our community. An amazing annual meeting featured the combined achievements of the Women’s Division and the Jewish Women’s Endowment Fund.

The 2009-2010 Lion of Judah and Pomegranate event, made possible by a generous gift from Nita Soref, was an elegant “high tea.” The program featured “The Faces of Aliyah,” and included remarks by Ethiopian artist Assia Avera (shown here).

The theme of the April 2010 Annual Meeting of the Women’s Division was ‘Extraordinary Times Call for Extraordinary Women.’ The focus was on the power of women, as demonstrated by the Women’s Campaign and the Jewish Women’s Endowment Fund. Shown here (left to right) are Event Co-Chairs Ruth Wallace and Susan Pittelman; 2010 Women’s Campaign Chair Andrea Schneider (note non-perishable food items stacked in front of the podium for later donation to the Jewish Community Pantry); and outgoing WD President Idy Goodman with incoming President Susan Angel Miller.

Jill Plavnick received the 2010 Ann Agulnick Young Leadership Award at the Women’s Division Annual Meeting.
Building Community through **Planned Giving and Endowment Development**

The Jewish Community Foundation partners with donors to help them plan for the future and fulfill their philanthropic goals through planned giving. The efforts of its professional staff and volunteer leadership have positioned the Jewish Community Foundation to continue to provide exemplary service to donors and beneficiary agencies. Through the years, the Jewish Community Foundation has worked with many families and their advisors to create gifts that have met estate and tax planning challenges while providing significant resources for the future well-being of the community.

This year, the Jewish Community Foundation has worked with donors to create many new donor advised funds and endowment funds. At the same time, more than $13 million have been distributed in this year alone from funds held at the Foundation, as donor advised fund holders continue to recommend gifts to support a wide array of programs and services that serve the local and global Jewish communities.

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**In Memoriam**

**Melvin S. Zaret**

1918-2010

For more than 50 years, Melvin S. Zaret was no less than the heart and soul of the Milwaukee Jewish community. In terms of leadership, vision, passion and commitment to Jewish federation work, Mel was quite simply in a class by himself. Motivated by a single-minded dedication to human welfare and the relief of human suffering, Mel served as executive of the Milwaukee Jewish Federation and its predecessor organization from 1955 through 1984. Following the end of his tenure, he continued to share his wisdom generously with all of us. We will never forget this towering figure of Jewish communal life. May Mel Zaret’s memory and legacy be for a blessing to his family and to our Jewish community. *(Mel is shown at left with his beloved wife Eva, signing his story for the Jewish Community Foundation’s Book of Life.)*
The mission of the Milwaukee Jewish Federation is to ensure the continuity of the Jewish people, to enhance the quality of Jewish life, and to build a strong and unified Jewish community in Milwaukee, in Israel and throughout the world.

In fulfilling its mission, the Federation is committed to the principles of Klal Yisrael (the collective unity of the Jewish people), tzedakah (the obligation to care for one another), and tikkun olam (improving the society in which we live).

2009-2010: Report to the Community focuses on the key concept of building Jewish community. Over this past year, we have devoted time and energy to the development of a Community Covenant, a document designed to bring us together by explicitly stating the commitments that Federation and our local partner agencies have made to one another. These promises bind us together and help us to build and strengthen our community.

Throughout this report, you will find examples of how your support through the Milwaukee Jewish Federation and the Jewish Community Foundation has added power and vibrancy to our community. Your commitment, volunteerism and financial contributions are making it possible, even in times of uncertainty, to maintain vital programs and services and continue our tradition of responsiveness to the needs of the worldwide Jewish community.
Linda Marcus, Marketing Chair
Laura Barnard, Marketing & Communications Director
Barbara Budish, Graphic Designer
Shelly M. Sampon, Project Manager

MILWAUKEE JEWISH FEDERATION

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info@milwaukeejewish.org