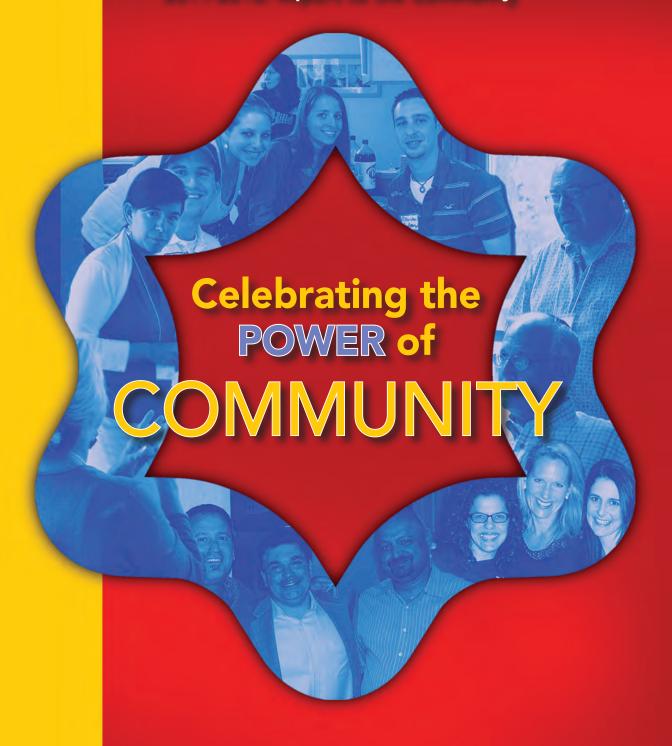
2011-2012: Report to the Community





COMMUNITY

In 2011-2012, the Milwaukee Jewish Federation raised funds through its Annual Community Campaign and the J-Help Emergency Assistance Campaign totaling \$7.1 million. These funds were allocated to local agencies, programs and services as well as to national and Israel & Overseas partners and for general community support; approximately \$740,000 raised through the J-Help Campaign went directly to assist community members in need.

The Jewish Community Foundation has grown to more than \$101 million in total assets through the creation of new funds, contributions to donor advised and endowment funds, and investment return. Funds from the Jewish Community Foundation are distributed to support the Annual Campaign, our agency partners, local and national Jewish and secular organizations.*

COMMUNITY MISSION STATEMENT

Through the development of community-wide financial support, planning and allocations, 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).

^{*}At the time of this printing, our official totals have not been compiled. This report presents estimated round numbers.



A MESSAGE from your Board Chair and Interim Executive Director



We are very pleased to present this story of community and to look back at the accomplishments of 2011-2012. This has indeed been a year like none other. Moving ahead from last summer's Jewish Community Summit and Strategic Action Session, we have learned to listen to your voices and plan for a future based on your dreams. The Reimagining and Transition have required hours of meetings, conversations, writing and rewriting, emails, phone calls and more, and our community has responded with an unprecedented level of volunteer involvement and commitment. Your generosity of time and talent has exceeded all expectations, and words cannot express our gratitude.

As you will see in this report, while the work of Reimagining has been a passion and a priority, our community has accomplished a great deal of additional, important work during 2011-2012. We completed and published the ground-breaking Jewish Community Study of Greater Milwaukee 2011; raised nearly three-quarters of a million dollars to help people in need in our own neighborhoods through the J-Help campaign; sharpened the focus of our direct service programs; conducted a successful search for a new Federation CEO; and raised sufficient funds to stabilize our community allocations. We've taken pride in outstanding achievements by our partner agencies; we've continued to convene, connect, advocate, educate, celebrate, foster and nurture; we've strengthened our ties to Israel and to Jews around the world.

We have learned to embrace change, and to listen – really listen – to the community and its vision for the future. These months have been challenging and exhilarating, and never have we been prouder to belong to and to serve the Milwaukee Jewish community.

Respectfully,

Jerry Benjamin, Board Chair

Sheryl Primakow, Interim Executive Director

meryl Frinckow

Reimagining & Transition

266 volunteer hours spent on Reimagining and Transition meetings and conference calls

300 community members attended the Jewish Community Summit at the end of June 2011

- Reimagining and Transition: informed every aspect of budgeting and planning for 2012-2013
 - Financial Resource Development and Outreach: two highest priorities for MJF, based on community input

Jewish Community Foundation

400 donor advised funds

300 restricted funds for MJF, agencies and synagogues

34 charitable gift annuities and remainder trusts

J-Help Community Assistance Campaign

\$740,000 raised during 2011-2012

Tzedakah and tikkun olam: two Jewish values given voice and substance by the J-Help effort

MJF Women's Division

\$1.6 million raised by the 2012 Women's Campaign for the community

107 Lions of Judah in our community

Outreach, engagement, support and leadership development: areas in which Women's Division leads the way in our Jewish community

Jewish Community Study of Greater Milwaukee 2011

- **30,000** approximate number of self-identified Jewish persons living in our area, based on the Study
- "Engaged, connected to one another, connected to Israel, invested in living Jewish lives:" characteristics of our community, according to the Study

Wisconsin Jewish Chronicle

7,800 households receive the monthly *Chronicle*

Jewish Museum Milwaukee

7319 individuals and school children visited the JMM 2011-2012

2348 individuals attended programs at JMM 2011-2012

Jewish Community Relations Council

3321 participants in JCRC programs 2011-2012

32 anti-Semitic incidents required JCRC intervention 2011-2012

Partner

Agencies

"A Hidden Jewish Gem in the Midwest:" phrase used by the Executive Director of the World Confederation of Jewish Community Centers to describe our own Harry & Rose Samson Family Jewish Community Center

953 students in our day schools (Hillel Academy, Milwaukee Jewish Day School, Yeshiva Elementary School) and pre-schools (Gan Ami Preschool, Jewish Beginnings Lubavitch Preschool)

5842 total students served in our youth programs (BBYO – Wisconsin Region, Hillel Foundation – UW Madison, Hillel Milwaukee)

2100 individuals helped by Jewish Family Services 2011-2012

older adults served by the Lakeside Senior Enrichment Program 2011-2012.

In excess of \$1.5 million: total dollar commitment of the new Milwaukee Jewish Day School Tuition Grant Program

Israel Center

2 Community Shlichim strengthen ties to Israel with the Jewish community and beyond

3827 Milwaukeeans built bonds with Israelis through Shin Shins and other partnership delegations 2011-2012

Coalition for Jewish Learning/ Holocaust Center

700 students in synagogue schools supported by CJL's Congregational School Initiative (CSI)

17,173 participants in Nathan and Esther Pelz Holocaust Education Resource Center (HERC) programs 2011-2012

SUMMARY OF CAMPAIGN INCOME AND COMMUNITY ALLOCATIONS 2011-2012

We are grateful to the MJF Executive Committee, which played a major role in the allocations process for 2012-2013, while the Community Planning and Allocations (CP&A) Committee was on hiatus during 2011-2012.

SOURCES OF FUNDS

Annual Campaign 2012	6,378,122
One-time Emergency Campaign (J-Help)	740,308

Total Funds Available for Distribution \$7,118,430

National Allocations

National Federation Agency Alliance	25,000
National Federation Agency Amarice	23,000

Total National Allocations \$25,000

COMMUNITY ALLOCATIONS

63,830
141,000
974,400
50,400
110,643
9,000
86,670
463,033
74,916
18,996
456,464
740,308
200,959
108,165

Community Support Expenditures

Allocation for MJF Core Operations (Does not include grants and other offsetting revenue sources)

Total Community Support Expenditures \$1,296,486

Other Services and Expenditures

Including Bad Debt	Reserve and	l MJF's Fair	Share of the
JFNA National Ope	erations		\$432,260

TOTAL COMMUNITY ALLOCATIONS \$7,118,430

Total Local Agencies/Programs Allocations \$3,498,784

Israel & Overseas

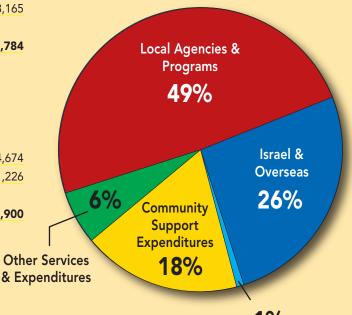
Overseas Partners:

Jewish Federations of North America (JFNA)

American Jewish Joint Distribution Committee

Jewish Agency for Israel \$1,604,674 Elective and Designated JFNA Overseas Programs 261,226

Total Israel & Overseas Allocations \$1,865,900



1%
National Allocations

SUMMARY OF JEWISH COMMUNITY FOUNDATION FUND GRANTS 2011-2012

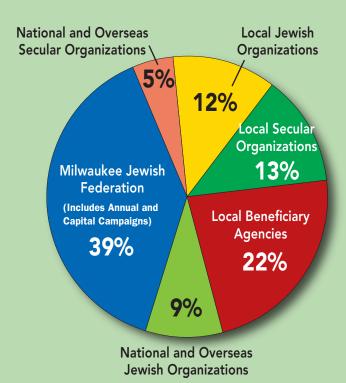


David J. Lubar – *Chair* Jewish Community Foundation

The Jewish Community Foundation is the central resource for planned giving and endowments in our community and provides the expertise to structure and manage gifts that benefit current and future generations.

Each year the Jewish Community Foundation provides essential support to our community through grants and distributions from funds. In 2011-2012, these grants and distributions totaled more than \$12 million. At the close of 2011-2012, total assets of the Jewish Community Foundation topped \$101 million.

Summary of Grants and Distributions Totaling \$12,000,000



MILWAUKEE JEWISH FEDERATION

More than the Sum of Our Parts

In addition to the Partner Agencies that educate our children, nurture our youth, care for our older adults and provide social, cultural and recreational services, the Milwaukee Jewish Federation includes core and direct services that offer essential programs and functions to enhance our Jewish lives.

Israel Center,

strengthening our crucial connection with the people of Israel

Wisconsin Jewish
Chronicle, building community
by bringing you news
of our community

Coalition for Jewish

Jewish education throughout

our community

Learning, supporting

Nathan and Esther Pelz Holocaust Education Resource Center,

teaching the lessons of the Holocaust and ensuring that the world will never forget

Jewish Community Relations Council,

advocating for Jews everywhere, leading the fight against anti-Semitism and joining in interfaith efforts

Jewish Museum Milwaukee, telling the story of Jewish Milwaukee through displays, interactive exhibits and outstanding programming Jewish Community
Foundation, the community's central resource for planned giving and endowments, providing personalized service to assist individuals and families in achieving their charitable goals

2012 ANNUAL CAMPAIGN LEADERSHIP



Bruce Arbit David Arnstein Nancy K. Barnett Mark Brickman Betty Croen* Jim Deshur Penny Deshur Jane Gellman Shel Gendelman Bruce Glaser Lawrence Glusman Dan Goldberg Idy Goodman* Seema Gorens* Eileen Graves* Betsy L. Green Michael Green Rebecca Guralnick* Robert L. Habush Jeanne Jacobs* Phillip Katz Judi Ketten* Judy Kristal* Marlene Lauwasser* Michael Levey

Cindy Levy Cynthia Levy* Lindy Liberman* Jody Kaufman Loewenstein Joan Lubar* Susan Angel Miller* Todd Miller Sanford Mitz Mitch Moser Elaine Nelles* Mitch Nelles Mindy Palay* Sharyl Paley* Susan Pittelman* Jill Plavnick* Josh Richman Lauri Roth* Rick Ruvin Andrea Schneider* Marty Slater Jason Steigman Jerry Stein Sue Strait* Melinda Swartz* David Werner

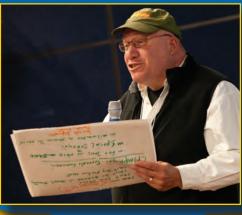
*2012 Women's Campaign Cabinet

Top: Mitch Moser – 2012 Annual Campaign Chair Below: Joan Lubar & Andrea Schneider – 2012 Women's Campaign Chairs

A SPECIAL THANK YOU

Soon after 2011-2012 drew to a close,
Jerry Benjamin concluded his three-year
term as MJF Board Chair. Jerry's leadership
saw us through times of change, challenge and
achievement, including: recovery from the
economic downturn, integration of the Jewish
Community Relations Council as a core
function of MJF, Reimagining and the first
steps of Transition, stabilizing of community
allocations, the Jewish Community Study of Greater
Milwaukee 2011, changes in professional leadership,
successes for the Jewish Museum Milwaukee, the J-Help

function of MJF, Reimagining and the first steps of Transition, stabilizing of community allocations, the Jewish Community Study of Greater Milwaukee 2011, changes in professional leadership, successes for the Jewish Museum Milwaukee, the J-Help Campaign, the Community Covenant and much much more. The Milwaukee Jewish community is grateful to Jerry for his energy, commitment, humor and wisdom. May you go from strength to strength!



MILWAUKEE JEWISH FEDERATION 2011-2012 OFFICERS

Board Chair:

Jerry Benjamin

Vice Chairs:

Fred Croen – Strategic Planning Mitch Moser – Annual Campaign Marlene Lauwasser – Community Planning & Allocations Nancy K. Barnett – Israel & Overseas

David J. Lubar – Jewish Community Foundation Susan Angel Miller

Women's Division

Treasurer:

Marci Taxman

Secretary:

Andrea Schneider

Interim Executive Director

Sheryl Primakow

Women's Division Officers

President:

Susan Angel Miller

2012 Women's Campaign Chairs

Joan Lubar Andrea Schneider

Vice Presidents:

Idy Goodman Eileen Graves Susan Pittelman Jill Playnick Sue Strait Marci Taxman Ruth Wallace

Board of Directors

Craig Adelman Joyce Altman◆ Bruce Arbit+ Danny Arnstein David Arnstein Rabbi Pinchas Avruch Stan Azimov Daniel Bader Nancy K. Barnett◆◆ Adam Bazelon Jerry Benjamin ++ Joseph M. Bernstein Nathan Bernstein Alan Borsuk Mark E. Brickman Ellis Bromberg Jayne Butlein+ Stephen L. Chernof Betty Chrustowski+ Nita Corré Fred Croen++ **Brad Dallet** Joe Devorkin **Gregory Dorf**

Andrea Florsheim Jane Gellman+ Rosalie S. Gellman Bruce Glaser Barbara Glazer Mark Goldstein Idv Goodman+ Don Grande Eileen Graves Betsy L. Green+ Michael Green Beverly Greenberg Todd Gruen Rebecca Guralnick Judy Guten+ Rabbi Jacob Herber Sara Hermanoff James Hiller Lisa Hiller Nathaniel Hoffman Lorraine Hoffmann Marc Jacobson Moshe Katz◆ Judi Ketten

Michael Lappin

Marlene Lauwasser Betty Lieberman Jody Kaufman Loewenstein+ Roberta London David P. Lowe David J. Lubar ++ Joan Lubar+ Michael Maistelman Linda Marcus Susan Angel Miller◆◆ Sanford Mitz+ Cheryl Moser Mitch Moser** Abigail Nash+ Mitch Nelles Laurance Newman Sharyl Paley+ Arleen Peltz **Beverly Perlson** Jill Playnick Josh Richman Stephen E. Richman Lauri Roth Richard Ruvin

Scott Sampson◆ Allen L. Samson Karen Schapiro Rabbi Yosef Schlussel **Brian Schupper** Andrea Schneider ** Jeffrey S. Schuster Diane Seder Rabbi Shmaya Shmotkin Dan Sinykin Jodi Habush Sinykin Susan Lubar Solvang Amy Berkovits Stein Gerald Stein Louise Stein Becca Steinman Sue Strait Melinda Swartz Marci Taxman◆◆ Leslie Usow Stephanie Wagner David Werner Eric Zall

Suzy Ettinger

^{◆ 2011-2012} Executive Committee

[♦]♦2011-2012 Officers

MJF COMMITTEES & WORK GROUPS

Each year, dedicated community volunteers devote their time and talents to a variety of committees and work groups to enable the Milwaukee Jewish Federation to achieve the strategic goals that guide the organization's activities and direction. During 2011-2012, the number of volunteer committee hours escalated dramatically, accelerated by the work of Reimagining and Transition.

CHAIRS OF COMMITTEES

Coalition for Jewish Learning (CJL) Advisory Board Susie Rosengarten

- Day of Discovery Committee Susie Fono, Judy Wolkenstein
- Day School Grant Allocation Committee
 Penny Wynn
- Holocaust Education Resource Center Executive Committee Harry Pelz
- Holocaust Education Resource Center Operations Committee Edith Shafer

Community Planning & Allocations Committee

Marlene Lauwasser

 Agency Review Council Susan Lubar Solvang

Israel & Overseas Committee

Nancy K. Barnett

- Kesselman Scholarship Committee Pam Frydman-Roza, Michal Rosenthal
- Partnership2Gether (P2G)
 Advisory Committee
 Pnina Goldfarb, Melinda Swartz
- Shlichut Program Committee Eileen Graves
- Yamim Committee
 Yonatan Zvi

Jewish Community Foundation (JCF) Board of Trustees

David J. Lubar

- Endowment Committee David J. Lubar
- Scholarship Committee Allan J. Carneol

Jewish Community Relations Council (JCRC) Joyce Altman

- Anti-Semitism/Constitutional Law Task Force
 Aaron Bernstein
- Interfaith Relations Michael Pollack
- Israel Advocacy & Education Task Force
 Jane Avner
- Social Justice/Domestic Policy Task Force Naomi Soifer

Milwaukee Jewish Federation Executive Search Committee Dan Bader

Milwaukee Jewish Federation Economic Forum Planning Committee Eric Butlein, Linda Gorens-Levey

Milwaukee Jewish Federation Finance Committee

Marci Taxman

 Audit Subcommittee Sanford Mitz

- Fiscal Stewardship Subcommittee David Werner
- Properties Subcommittee Fred Croen
- Investment Subcommittee
 Laurance Newman

Milwaukee Jewish Federation Marketing Committee Stephanie Wagner

Jewish Museum Milwaukee Marianne Lubar, *President*

- Acquisitions and Collections Committee
 Marjorie Margolies
- Development Committee Penny Deshur
- Education Committee
 Jane Avner
- Exhibit Committee
 Ethan Lasser
- Membership Committee Beverly Greenberg
- Program Committee Jane Chernof

Reimagining Steering/Transition Committee

Judy Guten, Marlene Lauwasser

Young Leadership Council Andrea Florsheim, Rebecca Guralnick

AGENCIES, PROGRAMS & PARTNERS

Milwaukee Jewish Federation Programs and Services

Coalition for Jewish Learning Israel Center Jewish Community Foundation Jewish Community Relations Council

Jewish Museum Milwaukee Wisconsin Jewish Chronicle

Milwaukee Jewish Federation Local Partner Agencies

BBBYO – 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 & 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



Looking Forward...

As the fiscal year 2012-13 began, MJF moved into the future by hiring a new CEO/President, Hannah Rosenthal, who was at the time of her hire serving as U.S. Special Envoy to Monitor and Combat Anti-Semitism. With deep Wisconsin roots and an international presence, Hannah accepted the position based on a strong interest in MJF's Reimagining and commitment to change. We look forward to Hannah's leadership!

ANNUAL REPORT TEAM

Stephanie Wagner, Marketing Chair Laura Barnard, Marketing and Communications Director Barbara Budish, Graphic Designer Shelly M. Sampon, Project Manager

