



# **PATTERNS OF SINGULARITY**

The Motivations of Independent Jewish Funders  
in Times of Economic Distress

**STEVEN M. COHEN AND DASEE BERKOWITZ**

Sponsored by:  
The Andrea and Charles Bronfman Philanthropies  
The Charles H. Revson Foundation

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## **ACKNOWLEDGMENTS**

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## SUMMARY

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THE VITALITY AND SUSTAINABILITY OF THE large number of independent and innovative Jewish philanthropic endeavors that have emerged just in the last decade is of critical importance, not only to the endeavors themselves, but also to the many generous individual philanthropists who support them. Even before the world-wide fiscal crisis hit with full force, those who lead the vast number of innovative projects and those who have been most committed to funding them have had strong interests in understanding the motivations and inclinations of like-minded (or potentially like-minded) philanthropists. Both benefactors and beneficiaries ask: how can other Jewish philanthropists be persuaded to join in supporting new independent and innovative endeavors in Jewish life – and how can we do so in the midst of an economic downturn? This study explores the motivations of independent Jewish funders, focusing upon their motivations for supporting “independent, innovative initiatives” in Jewish life.

Notwithstanding the variation and individuality in donor motivation, personality and giving, this analysis of donors associated with the Jewish Funders Network, which graciously facilitated our research, uncovers identifiable patterns of interests, motives and perceptions.

We conducted our research in two stages, beginning with in-person in-depth interviews with 17 donors, chosen to reflect several dimensions of diversity. We followed this qualitative stage with a web-administered survey completed by 195 donors and foundation professionals associated with the Jewish Funders Network (JFN).

### 1. ENGAGED IN JEWISH LIFE

JFN donors exhibit a wide range of Jewish identity configurations, exemplified by the observation that as many are Orthodox as are non-denominational. But with all their diversity, JFN members are, on the whole, deeply engaged in Jewish life – by any standard. They are highly in-married, highly affiliated and highly connected with Israel. They also report levels of Jewish education that rise significantly above those reported by other American Jews their age.

### 2. A WIDE RANGE OF GIVING

These donors’ giving levels cover a wide span, as the size of their philanthropy ranges from \$25,000 to over \$10 million annually. Their philanthropies make average annual gifts of about \$1.7 million to all causes, and about \$1.3 million to Jewish causes. On average, they donate about 69% of their charitable funds to Jewish causes.

### 3. THE ECONOMIC DOWNTURN AND ITS IMPACT ON UNIVERSAL AND JEWISH GIVING

These donors anticipate that the economic downturn will more severely depress their giving to general causes than to Jewish causes. These responses imply that the proportion of their philanthropy given to Jewish causes will actually increase in 2009, reflecting a tendency for donors to focus on what they regard as a core philanthropic mission. For these JFN philanthropists, Jewish giving is at the core.

#### **4. LIMITED ENTHUSIASM FOR ESTABLISHED JEWISH GIVING**

Most of these donors (56%) do support “established” institutions in the Jewish community. However, fully 44% do not make “very significant” gifts to such institutions, and an additional 31% make such a gift to only one category of such institutions, such as to those in Israel, or to day schools, federations, synagogues and other agencies. In light of their socio-demographic profile (affluent, middle-aged, Jewishly engaged, philanthropically generous), these responses point to only limited enthusiasm for established institutional giving. Giving to established agencies peaks in the middle years (ages 45-54), perhaps reflecting peak levels of leadership involvement in established institutions, and suggesting the potential to recruit both older and younger donors for innovative giving.

#### **5. SUPPORT FOR INNOVATION**

Most (63%) also donate to what they regard as innovative projects in Jewish life. Their interpretation of “innovation” does not, by any means, exclude causes within the ideological domain of traditional Judaism. The innovative causes they support range over such issue-areas as Jewish education, Jewish continuity, progressive causes, social services, and culture, but many are unclassifiable and cross several prevailing categories of philanthropic activity.

#### **6. CONCERNED FOR THE JEWISH FUTURE – AND THE FUTURE JEWS**

These donors’ Jewish philanthropic priorities attest to a truly wide range of interests, but chief among them is “educating Jewish children and adolescents.” While education is the highest rank-

ing concern, second, third and fourth places are also occupied by continuity-related themes: Jewish young adults, Jewish learning and young Jews’ ties to Israel. In broad terms, Jewish continuity issues speak powerfully to these donors.

The prominence of concern for Jewish continuity represents a significant break with the historic concerns of American Jewish philanthropy, when the relief of human suffering played a major role in animating Jewish philanthropic engagement. Such causes eventually gave way somewhat to Peoplehood issues (Israel, Soviet Jewry) and then to Jewish education toward the end of the 20th century. Despite these shifts, the long-standing focus on tending to individual hardship (for example, the elderly in the US or Ethiopian immigrants in Israel) still features quite prominently in Federation campaign marketing. We find that such themes do not seem to engage the donors in our study or others who share their views and interests. This is not to suggest that they are indifferent to human (and Jewish) suffering, rather that they tend to show excitement about cause-related projects that touch on the hopes and fears for the Jewish vitality of the next generation of American Jews.

#### **7. MOTIVATIONS FOR GIVING TO INNOVATIVE CAUSES**

Giving to innovative causes as opposed to establishment agencies draws to some extent on different motivations and characteristics. Donors to independent, innovative projects tend to share these characteristics:

- High levels of Jewish education;
- An independent stance toward conventional communal affiliation and prevailing denominational categories;
- A positive view of innovation in Jewish life;

- A weaker commitment to a conventional “business orientation” to philanthropic giving;
- An inclination toward “progressive” social causes.

## **8. OBSTACLES TO GIVING TO INNOVATIVE CAUSES**

In contrast, an unwillingness to support innovative projects tends to be associated with the following characteristics:

- Lower levels of Jewish education, making it difficult to appreciate the need to innovate;
- Higher levels of engagement with Jewish institutional life, making it difficult to break with prevailing patterns, commitments and loyalties;
- A resistance to innovation;
- A commitment to the approaches and criteria associated with America’s market-driven business culture;
- Political, religious and cultural conservatism, leading to skepticism of, if not opposition to, many of the more progressive-leaning innovative endeavors.

In short, the Jewishly educated and those who somewhat separate themselves from established

patterns of Jewish engagement exhibit a somewhat greater tendency to fund independent, innovative start-up projects. Both traits produce a greater willingness to consider innovative and non-conventional ideas. The ideal donor for such projects is someone with a strong Jewish education whose Jewish involvement is unconventional or, in some ways, unaffiliated. While donors with extensive Jewish education and donors with limited ties to conventional Jewry are not that unusual, those possessing both traits are rare.

Finally, from a larger perspective, this research uncovers a “Jewish philanthropic disconnect.” This disconnect separates perceptive and passionate donors from the innovators who may be among the best partners for achieving the funders’ aims. While established institutions have effectively served current and preceding generations of Jews for several decades, today’s donors can perceive deep-seated changes in culture and technology that challenge the effectiveness of these institutions. In addition, many donors seek to ensure a vital Jewish future by developing new ways to engage the next generation of American Jews. Yet, despite their readiness to innovate and interest in investing in the Jewish future, they do not connect with those who currently embody and can enrich the Jewish future.

In essence, this research aims to help both sides bridge this disconnect. It seeks to help connect wisdom with innovation, ideas with implementation, and resources with the resourceful.

## THE CONTEXT AND THE QUESTIONS

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THE LAST SEVERAL YEARS HAVE SEEN AN explosion of independent Jewish philanthropic activity, both on the part of funders and in the endeavors they support. One recent estimate puts the annual sums invested in independent Jewish “start-ups” and other such innovative ventures at approximately \$100 million (Landres and Avedon 2009). In fact, the surge in new initiatives in the Jewish world parallels an explosion in NGO’s (non-governmental organizations) all over the world.

The new endeavors in the Jewish community – be they in North America, Israel or elsewhere – range across a variety of domains. They embrace social justice projects, new independent religious communities, experiments in new media (and old), Jewish learning in various forms, cultural activities (music, filmmaking, dance, art, etc.), and social services to under-served populations (see, for example, Cohen and Kelman 2006, 2007). Many of these are headed by “young” people – social entrepreneurs between the ages of 25 and 39.

To give a sense of the nature and variety of this phenomenon of philanthropic motivation (and with apologies to the very many we do not mention), here is a representative list of some of the better-known ventures, chosen to demonstrate variety along many dimensions. As an illustrative sampling, we have: Advancing Women Professionals and the Jewish Community, American Jewish World Service, An Ethical Start, AVODAH: The Jewish Service Corps, Drisha Institute, Encounter, Facing History and Ourselves, Foundation for Jewish Camp, Hazon, IKAR (and other emergent spiritual communities), Mayyim Hayyim, Mechon Hadar, Institute for Jewish Spirituality, JDub Records, Jewish Orthodox Feminist Alliance, Jewish Outreach

Institute, Limmud NY (and similar Jewish learning events and initiatives), Nextbook, New Voices Magazine, The PJ Library, Reboot, the Skirball Center for Adult Jewish Learning, StorahTelling, and on and on – and on! (See, for example, Bennett and Goldseker 2005, 2006, 2007, 2008; Goldseker 2001, 2006.)

We have no clear, crisp, well-bounded definition of these entities. To varying degrees, they share the following characteristics, but none share all of them:

- Issue-focused, passion-driven;
- Active in learning, social justice, culture, spirituality and/or new media;
- Situated institutionally outside, but alongside, the prevailing framework;
- Partially discontinuous with patterns prevalent in the established community;
- Recently initiated;
- Relatively low budget;
- Often led by Jews under the age of 40.

If, in the history of organized American Jewry, the 1990s were the decade of Jewish continuity, the first decade of the 21st century has been the period of Jewish social entrepreneurship. In the 1990s, the Federation system, and philanthropists in its orbit, pumped resources into Jewish educational instruments and into experiments in Jewish institutional life. Since the start of this decade, independent philanthropists have assisted ever-struggling new ventures led largely by passionate younger adults seeking to create alternatives to the prevailing institutional system, thereby providing their own answers to the concerns for Jewish continuity.

For both the independent, innovative endeavors and the many generous individual philanthropists who support them, the nature and condition of this collection of independent and innovative Jewish philanthropic endeavors is of critical importance. Even before the world-wide fiscal crisis hit with full force, leaders of the vast number of independent, innovative projects as well as their most committed funders have had strong interests in understanding the motivations and inclinations of like-minded (or potentially like-minded) philanthropists. Both benefactors and beneficiaries ask how other Jewish philanthropists can be persuaded to join in supporting new independent, innovative endeavors in Jewish life. This overall practical question, in turn, devolves into the following research questions:

- 1) What philanthropy-related **motivations** underlie the decision-making of independent Jewish philanthropists?
- 2) Conversely, what are the **blockages and obstacles** to engaging funders in the support of independent, innovative endeavors?
- 3) What **appealing characteristics** of the beneficiaries attract the interest and attention of the funders?
- 4) What are the **social characteristics** of the potential funders who are more predisposed to supportive independent, innovative, Jewish charitable endeavors?

These questions take on a special urgency in the wake of the fiscal crisis and the significant

contraction of resources that has been experienced by funders and beneficiaries alike, on both institutional and personal levels. Simply put, with less money to go around and more need for the scarce resources available, how are funders previously inclined to support Jewish causes likely to act in the future? To what extent will Jewish philanthropic causes suffer, and will they suffer more or less than other causes – at least among the funders who have been most committed to the Jewish philanthropic sector?

Discerning the images, perceptions, inclinations, interests and values of donors and their charitable foundations is no simple undertaking. Ted Smith, Executive Director of the Henry P. Kendall Foundation in Boston, has been credited with the oft-repeated observation, “You know one foundation, you know one foundation.” In other words, every foundation is so strikingly distinctive in its decision-making process and the number of generations around the table as well as in its values, interests, culture, history and personality, one can hardly generalize to any others. (On Jewish foundations, see, for example, Solomon 2005.) Indeed, every foundation is just like every individual: unique – or singular (Karp et al. 2003; Tobin 2001, 2004; Tobin & Weinberg 2007a, 2007b). That said, in our investigation of the diverse values, motives and inclinations of independent Jewish funders and their outlooks on innovative endeavors in Jewish life, we can discern certain tendencies and regularities. In other words, amidst all the distinctiveness and singularity, our research has uncovered certain patterns. We call them “Patterns of Singularity.”

## METHODS

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SPONSORED BY THE ANDREA AND CHARLES Bronfman Philanthropies and the Charles H. Revson Foundation, this social scientific research project explored the factors most critical to understanding both the recent past and the likely future of independent philanthropic giving to Jewish independent, innovative endeavors.

The data collection, which took place in 2008 and early 2009, consisted of two phases: qualitative interviews, and a social scientific survey of funders (and some professionals) who subscribe to the e-mail lists of the Jewish Funders Network (JFN).

The Jewish Funders Network describes itself as “an international organization dedicated to advancing the quality and growth of Jewish philanthropy. JFN’s members include independent philanthropists, foundation trustees and foundation professionals.” ([www.jfunders.org](http://www.jfunders.org))

The qualitative stage of research consisted of a series of in-person and phone conversations with Jewish funders. (See the appendix for the discussion guide that largely structured our conversations.) We interviewed 17 donors, generally for about an hour apiece. We chose them to represent several dimensions of diversity: age,

gender, philanthropic capacity, Jewish ideology and prior engagement with – or presumed estrangement from (we’ll see both sorts of donors below) – independent, innovative initiatives undertaken by young social entrepreneurs. (The appendix includes a chart with their characteristics.) Our primary goal here was to gather the range and quality of considerations that inform philanthropic decision-making. We sought not only their opinions, but the ways in which they formulated their responses. Their answers and the words they used, in turn, shaped the content and phrasing of the questionnaire (see appendix) that we developed and sent to approximately 750 philanthropists and lead professionals who subscribed to JFN e-mail lists (some recipients were duplicates, and many philanthropies had several family members or professionals subscribing to JFN lists).

We sent four e-mail requests (see appendix) asking potential respondents to turn to a web-based survey administered by Research Success in Jerusalem, using the Qualtrics survey design software. As many as 232 opened the survey, and, of them, 195 provided a sufficient number of usable answers to be retained for the analysis.

## DEMOGRAPHIC AND JEWISH PROFILES

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AUGUSTE COMTE, THE EARLY 19TH CENTURY French philosopher seen by many as the founder of sociology, is thought to have intoned: “Demography is destiny.” While in some cases, Comte’s dictum may be over-stated, there can be no doubt that understanding the demographic and Jewish characteristics of the donors in this study is critical for understanding their motivations for philanthropic giving. Moreover, their demographic and Jewish characteristics themselves paint a portrait of a rather distinctive group, one certainly distinguished from the larger American Jewish population from whom almost all are drawn.

So, in broad strokes, who are the respondents to the survey? They are largely philanthropists with annual giving ranging from \$25,000 to well over \$10 million. They are mostly middle-aged and mostly men. They are denominationally diverse, highly engaged in Jewish life and relatively well-educated in Jewish childhood and adolescent experiences. They devote over two-thirds of their philanthropy to Jewish causes, obviously a key factor in their choice to affiliate with the Jewish Funders Network.

To add a bit more detail, respondents consist of the philanthropists themselves, as well as the professionals and others who advise them, distributed as indicated (top right).

In short, almost all (86%) are donors, and the rest (14%) are their advisors who have responded to our questions not with respect to themselves, but with respect to the donors and foundations for whom they work.

More are men (58%) than women (42%). Just over half the respondents (51%) report having children at home. We have not asked about their personal wealth, income or family history of affluence.

### How will you be answering this survey?

	%
As an individual philanthropist with respect to my own values	58
As an individual philanthropist with respect to a family or board of which I am a part	26
As a professional or advisor	15
In another capacity	1

### Your age

	%
65+	26
55-64	30
45-54	30
35-44	12
25-34	3

These respondents are largely middle-aged, with an overall median age of 58. Just 15% are under 45, and more (26%) are 65 and over, as reported immediately above.

### ENGAGED IN JEWISH LIFE

All the indicators point to high rates of Jewish involvement on the parts of these donors. Almost all respondents (99%) are Jewish; of those who are married, almost all (97%) are married to Jews. In terms of their denominational

identities, respondents are about equally divided among four groups: Orthodox, Conservative, Reform and all other. In this respect, relative to the American Jewish population at large, this sample contains about triple the number of Orthodox, and a higher proportion of Conservative Jews among those outside of Orthodoxy. Moreover, the non-denominational in this population, in contrast with their counterparts in the general American Jewish population, report high rates of Jewish education and Jewish engagement.

Denominational preference	%
Orthodox	26
Conservative	27
Reform	23
Reconstructionist	3
Renewal	1
Post-denominational	2
Secular	4
None	5
Other	10

In fact, nine out of ten (90%) of all respondents are members of congregations, well more than double the figure reported by the American Jewish population at large. Almost three-fifths (58%) report attending Shabbat services monthly or more, about three times the US average for the general Jewish population. About nine out of ten report that most of their friends are Jewish, almost three times the national average for American Jews.

### STRONG TIES TO ISRAEL

If they are heavily engaged as Jews, they are also intimately tied to Israel. Almost all (97%) have

been to Israel, more than twice the US average. Even more impressive is the extent to which they have been there. As many as 87% have either been to Israel three times or more or have lived there (as have 21%). In fact, almost half (49%) have visited Israel in their youth, twice the figure found in the overall American Jewish population. Still other findings speak to their relatively rich levels of Jewish education, both formal and informal.

### Have you ever been to Israel?

	%
Live(d) in Israel	21
Three+ times	66
Visited twice	2
Visited once	8
No, never	3

### SIGNIFICANT JEWISH EDUCATIONAL EXPERIENCES

Along with this impressive rate of travel to Israel, large numbers of these donors also report a variety of Jewish educational experiences in their childhoods. 40% report having taken Jewish Studies courses in the university, a phenomenon all the more significant when we recall that the proliferation of Jewish Studies at American universities did not get underway until the mid-1970s, after the period when most of these respondents would have attended university. Of note as well is that 22% attended day school, and they did so at a time in history (post-World War II) when not even a majority of Orthodox-raised children attended day schools and certainly when very few children outside of Orthodoxy were day school students.

In short, by any reasonable measure, this class of Jewish funders is indeed distinguished

### Jewish educational experiences

	%
Jewish youth group	51
Visited Israel	49
Jewish studies course(s)	40
Overnight Jewish summer camp	37
Hillel or other Jewish activities in college	29
Day school	22

by a rich array of Jewish educational experiences. Although these experiences took place years or even decades ago, their impact continues to be felt to the present day. These educational experiences undoubtedly contribute to the high levels of Jewish engagement among these donors and their professionals. Along with their engaged Jewish lives, their strong Jewish educational background certainly has helped propel them into an active commitment to philanthropy in general and to Jewish-oriented philanthropy in particular. Our field notes reflect this sentiment from one of the funders we interviewed.

A turning point for him, was attending the Wexner Lay Leadership program in New York. There, he became Jewishly literate and also gained a sense of **pluralistic outlook** regarding Jewish life, prayer and God. The combination of being in the Wexner program (and discussing issues of Jewish faith and life in the **abstract**) and his **concrete** committee work building the JCC (where he had similar conversations about creating an inclusive community) was very powerful. (Male, 65-70.)

Moreover, as we shall see, Jewish educational background not only motivates giving to Jewish philanthropy in general, it also shapes and influences the types of Jewish philanthropic endeavors that these donors find most compelling and appealing.

### “MORE JEWISH” THAN ANTICIPATED?

To those who know the Jewish Funders well, the high levels of Jewish education, communal engagement and Israel connection may come as no surprise. But for some, these findings are unanticipated. Some hold the view that JFN’s original, founding mission was to serve as a community for the children of established philanthropists, that is, for those whose commitment to Jewish causes and Jewish life might not be as unwavering as that of their parents or grandparents. To others, JFN projects an image of independent-minded funders, many of whom exhibit a strong commitment to so-called “progressive” social causes. Indeed, the evidence we present below is in many ways consistent with these images.

Nevertheless, the profile of Jewishly educated and Jewishly engaged JFN members should not be all that surprising. After all, these are people who make affirmative choices to affiliate with an explicitly Jewish organization and to associate with other donors who show a strong commitment to Jewish philanthropy. As we know, social networks are very powerful and influential. They serve to draw together people of common backgrounds, values and interests. They also serve to strengthen shared perceptions, motives and behavior. The Jewish Funders Network exhibits the powerful processes of social networks, drawing together committed Jewish philanthropists whose very presence and association tends to reinforce their shared commitment to Jewish philanthropy, Jewish causes and Jewish life in general.

**A WIDE RANGE OF GIVING, JEWISH AND OTHERWISE**

JFN declares on its website: “Membership is open to individuals and foundations that give away at least \$25,000 annually in philanthropic dollars, and do so through the lens of Jewish values, no matter whether the funds go to a specifically Jewish cause or to a cause more broadly defined.” Beyond the minimum requirement of membership, the respondents and the universe from which they are drawn vary significantly in the extent of their annual philanthropic giving to all causes and to Jewish causes in particular.

With respect to all causes in 2008, respondents report a giving median (i.e., the half-way point) of about \$240,000 (half gave less, half gave more). However, the mean is much higher, owing to a large number of respondents reporting much higher annual levels; nearly a quarter donate \$1 million or more annually, and 11% report giving \$5 million or more. A conservative estimate of the mean total annual giving of these respondents (or the foundations they represent) reaches about \$1.7 million, as portrayed in the following distribution.

**About how much did you donate to all philanthropic causes in 2008?**

	%
\$10+ million	6
\$5-9 million	4
\$3-5 million	3
\$2-3 million	3
\$1-2 million	7
\$500,000-999,999	9
\$250,000-499,999	15
\$100,000-249,999	25
\$50,000-99,999	16
Under \$50,000	12

With respect to what respondents term “Jewish causes,” they report giving a median of \$190,000 in 2008, and a mean of about \$1.3 million. The distribution is as follows.

**In 2008, about how much was donated to “Jewish causes,” that is, ANY cause with ANY relationship to being Jewish or with Israel?**

	%
\$10+ million	4
\$5-9 million	2
\$3-5 million	2
\$2-3 million	5
\$1-2 million	5
\$500,000-999,999	7
\$250,000-499,999	14
\$100,000-249,999	25
\$50,000-99,999	18
\$25,000-49,999	11
Under \$25,000	7

Donations to Jewish causes represent about two-thirds (69%) of their total giving, a figure somewhat in excess for the Jewish population at large, and slightly larger than that found among somewhat affluent Jews who are affiliated with a Jewish communal institution. For example, respondents in the 2001 National Jewish Population Study report that 47% of their giving goes to Jewish causes. Among those who are communally affiliated and reasonably affluent, the figure reaches 63%. Thus, the 69% reported here for higher-end philanthropists associated with the Jewish Funders Network is both credible and consistent with previously reported patterns.

The portion of philanthropy devoted to specifically Jewish causes is higher among funders making smaller gifts overall (under \$500,000),

and it is somewhat lower among those who donate \$500,000 or more in total annual giving. In other words, smaller donors devote a proportionally larger fraction of their philanthropy to Jewish causes than do larger donors.

Not surprisingly, another factor affecting the proportion of money donated to Jewish causes is increased Jewish engagement, however measured. Donors who report more ties to Jewish institutions, more frequent religious service attendance and higher levels of ritual practice devote greater fractions of their giving to Jewish causes, a relationship that has long been noted in the literature (Cohen 1978, 1980; Ritterband & Cohen 1979). The relationship may be intuitively obvious, but its policy implications may be lost to some: not only are efforts to generate greater Jewish engagement worthy in their own right, they also have immediate financial consequences for Jewish giving and the very health of organized Jewry.

Accordingly, the donors' denominational identities are fairly decent predictors of the extent to which they devote their philanthropic giving to Jewish causes. Orthodox donors give proportionally more to Jewish causes, followed in turn by Conservative and then Reform donors (81%, 70% and 51%, respectively).

It may come as a bit of surprise that giving by non-denominational donors (those who are secular, "just Jewish," etc.) approximates the patterns of Conservative Jews in this sample. In the general population, the non-denominational are the least engaged in Jewish life. They are "non-denominational by default." But in elite samples (such as donors), those who eschew a major denominational identity are "non-denominational by design." Their rejection of denominational categories points to a measure of distance from conventional Jewry, and that distance is associated not only with higher rates of giving to Jewish causes, but also, as will be discussed later, to higher rates of giving to independent, innovative initiatives in Jewish life.

## THE ECONOMIC DOWNTURN AND ITS IMPACT ON UNIVERSAL AND JEWISH GIVING

Respondents report that the economic downturn will, indeed, depress their levels of giving in the coming year. Fully 46% predict declining giving to all causes, more than three times the number (14%) who anticipate increased giving. In fact, the ratio with respect to "significant" decreases and "significant" increases is even more lopsided: 15% vs. only 2%.

### As compared with 2008, do you expect that you/your philanthropy in 2009 will...

	%
Increase significantly	2
Increase slightly	12
Remain about the same	35
Decrease slightly	33
Decrease significantly	15
Not sure	4

While still pointing toward declining donations, the results for Jewish giving are decidedly less lopsided. Those anticipating declines outnumber those anticipating increases by nearly a two-to-one margin (29% vs. 16%), indicating diminished giving. But the results point to smaller declines in Jewish giving compared with those anticipated for general giving. While 15% of respondents predict a significant decrease in their total giving, just 7% predict a significant decrease with respect to Jewish giving.

While only 6% of donors expect to diminish their giving to Jewish causes as a fraction of their total giving, as many as 26% will treat their Jewish giving more favorably than giving to other causes. Moreover, the tendency to give favorable treatment to Jewish causes is greater among those who make

**As compared with 2008, do you expect that your giving to “Jewish causes” in 2009 will...**

	%
Increase significantly	4
Increase slightly	13
Remain about the same	52
Decrease slightly	21
Decrease significantly	8
Not sure	3

larger gifts to Jewish causes. In fact, among those giving \$100,000 or more, hardly ANY donors project declines in the relative position of Jewish giving in their philanthropic portfolio. Of these larger donors to Jewish causes, about 30% predict relative advancement in the proportion of their giving going to Jewish causes, with the rest maintaining the previous year’s proportional level of giving to Jewish causes.

**CONCERNED FOR THE JEWISH FUTURE – AND FOR THE JEWS OF THE FUTURE**

We have asked respondents about the mission of causes that appeal to them, a question that may bear only a loose resemblance to their actual giving patterns. In other words, we have not analyzed the character of their actual beneficiaries (a task that would pose severe classificatory challenges). Rather, we have simply asked them to indicate the extent to which certain Jewish causes in general appeal to them.

Their Jewish philanthropic priorities attest to a truly wide range of interests, but chief among them – by far – is “educating Jewish children and adolescents.” The prominence of this mission speaks to the continuity concerns of these donors. (See Ruskay & Kurshan 1999; Shrage 2000.) Not

only is education ranked first by these donors, it turns out that second, third and fourth places are also occupied by continuity-related items: Jewish young adults, Jewish learning, and young Jews’ ties to Israel. Taken together, these responses seem to say, “I want to support Jewish education for children and adolescents. After they get a bit older, I want Jewish young adults to engage in identity-building initiatives, where they’ll undertake Jewish learning and strengthen their ties to Israel.”

In line with this constructed, synthetic quotation, we did in fact hear our in-person interviews make similar statements, such as:

“What interests me is to figure out what is going to be compelling enough so that [young people] will want to flock to Judaism.... The 20- to 30-year age is interesting to me because they are getting married later, and they want to think about why to raise their children Jewish,” (Female, 50-55).

The prominence of Jewish continuity concerns among these donors represents a significant break with the historic concerns of American Jewish philanthropy in earlier decades, when the provision of social services and the relief of human suffering played major roles in animating Jewish philanthropic engagement. Such causes held center stage throughout most of the 20th century before giving way somewhat to Peoplehood issues (Israel, Soviet Jewry) and then Jewish education during the last third of the 20th century. (See, for example, Bubis & Cohen 1998; Cohen 2004; Dashefsky 1990; Edelsberg 2004; Wertheimer 1997). Despite these shifts, the long-standing focus on tending to individual hardship (the elderly in the US, the Holocaust survivors in the FSU or the Ethiopian immigrants in Israel) still features quite prominently in the marketing and communication of many Federation campaigns. Our findings suggest that

such themes do not play particularly well among these JFN donors, or among others who share their views and interests. This is not to suggest that they are particularly hard-hearted and indifferent to human (and Jewish) suffering. It is to say that they tend to wax especially enthusiastic about cause-related projects that in one way or another touch on the continuity agenda – the hopes and fears for the Jewish vitality of the next generation of American Jews.

The issue-areas and the extent to which they appeal to donors, tend to cluster. That is, donors

who find certain issues appealing are also drawn to certain other issues. Those who care especially about educating children also tend to care about innovative Jewish learning initiatives for adults; those drawn to projects by and for young adults also want them to connect to Israel; or those who see themselves as social justice donors are also inclined to work on behalf of Israeli-Palestinian coexistence, environmentalism and gender equity. Putting it all together (where we can) many, but not all, of the interests of these philanthropists cluster under four major rubrics

**Thinking about your current giving to Jewish causes, what are the issue areas that appeal to you?**

	%
<b>Educating</b> Jewish children and adolescents	69
Supporting identity-building initiatives by & for Jewish <b>young adults</b>	46
Innovative <b>Jewish learning</b> initiatives	37
Strengthening young people's <b>ties to Israel</b>	37
<b>Social justice</b> initiatives	34
Public relations and <b>advocacy</b> on behalf of Israel	32
Social services for <b>the aged</b>	32
Social services for <b>children</b>	32
Community service; promoting <b>volunteerism</b>	28
<b>Leadership</b> development	27
Promoting co-existence between <b>Israelis and Palestinians</b>	22
People with <b>special needs</b>	20
<b>Holocaust-related</b> education	18
<b>Early childhood</b> initiatives	17
Jewish <b>spirituality</b>	17
Advancing Jewish <b>women</b> ; gender issues	16
Arts and <b>culture</b>	16
Outreach to <b>intermarried</b> couples	15
<b>Environmentalism</b> through a Jewish lens	11
<b>New media</b> with a focus on Jewish identity	8
Jewish media (e.g., JTA, <b>newspapers</b> , magazines)	6

that we have derived from their answers on the survey:

- Jewish education;
- Jewish continuity;
- Progressive causes;
- Jewish survival agenda.

To be clear, these are our designations, designed to represent the individual causes embraced by each rubric. The specific causes under each rubric are given on page 17.

One finding of some of interest relates to the issue-area of “community service; promoting volunteerism.” It is noteworthy that this issue-area is especially appealing to donors who feel particularly drawn to projects for young adults, leadership development and outreach to the intermarried. In other words, these donors’ mental maps join community service with continuity issues.

This linkage troubles some advocates of community service. In their view, the idea of community service is misused by the donor community, insofar as many donors see community service as a vehicle for promoting Jewish continuity in the next generation. Some passionate advocates of community service, be it locally or around the world, believe that the commitment to serve others in need or hardship ought to be valued intrinsically rather than as a means to another end. To them, it’s a distinction between beneficiary-centered service (focused on helping the needy) and volunteer-centered service (seeking to teach and engage the helpers).

Another noteworthy finding is the distinction between two mission objectives that might seem to be related but empirically are not: Israel advocacy and strengthening young Jews’ ties to Israel. Those most committed to Israel advocacy (defending Israel’s moral image in the public domain) also tend to find Holocaust education especially appealing. These two items comprise the “Jewish survival agenda” rubric, as we call it, and both have the same underlying purpose: to help fair-minded people appreciate the threats to Jewish physical and national survival past and present, and to defend Jews’ and Israelis’ moral and political standing in the world today.

The Israel education activists, be they educators or donors, are focused almost exclusively upon Jews, seeking to deepen their engagement with Israel. Thus, donors drawn to “strengthening young people’s ties to Israel,” are people who resonate with other continuity-oriented issues. These results suggest that Israel advocacy (fighting to protect Israel’s standing in the media, academia and public opinion generally) draws upon a different donor constituency than what may be called “Israel education.” Indeed, advocates of “Israel education” have argued that their work needs to be seen as separate and apart from efforts to promote Israel’s image in the media, public consciousness and political domain. It seems that the philanthropists in this study recognize this distinction, and they see Israel advocacy and Israel education as quite distinctive endeavors.

## Issue Clusters: Four Major Rubrics of Jewish Philanthropic Giving

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### Education

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1. **Educating** Jewish children and adolescents.
2. Innovative **Jewish learning** initiatives.
3. Jewish **spirituality**.

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### Continuity

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4. Supporting identity-building initiatives by & for Jewish **young adults**.
5. Strengthening young people's **ties to Israel**.
6. **Leadership** development.
7. Community service; promoting **volunteerism**.
8. Outreach to **intermarried** couples.

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### Progressive Causes

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9. **Social justice** initiatives.
10. Promoting co-existence between **Israelis and Palestinians**.
11. Advancing Jewish **women**; gender issues.
12. **Environmentalism** through a Jewish lens.

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### Jewish survival agenda

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13. Public relations and **advocacy** on behalf of Israel.
14. **Holocaust-related** education.

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### Unclustered

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15. Social services for **the aged**.
  16. Social services for **children**.
  17. People with **special needs**.
  18. **Early childhood** initiatives.
  19. Arts and **culture**.
  20. **New media** with a focus on Jewish identity.
  21. Jewish media (e.g., JTA, **newspapers**, magazines).
- 

### LIMITED ENTHUSIASM FOR ESTABLISHED JEWISH GIVING

In addition to asking respondents about the types of causes that they find appealing, we have also asked about their actual giving patterns, focusing first upon well-established Jewish communal institutions (see page 18) and then on

more recently established and smaller agencies and causes (see page 20).

With respect to the established institutions, among the more popular are institutions in Israel and elsewhere around the world (where 22% report having made a “very significant” gift in the last year), Jewish day schools (17%), and local UJA-Federation campaigns (16%). (See the appendix for

**Of the funds donated to Jewish causes, about how much did you donate to the following established institutions of Jewish communal life?**

	No donation	A modest amount	A significant amount	A VERY significant amount
Institutions in <b>Israel</b> , or outside No. Amer.	15	33	30	22
Jewish <b>day schools</b>	33	22	28	17
UJA- <b>Federation</b> (or something similar)	25	32	28	16
Identity-building for <b>adolescents</b> (camps, youth groups, trips to Israel)	35	31	19	15
<b>Synagogues</b> , incl. dues, capital campaigns	15	42	35	9
Jewish <b>university</b> programs	39	39	18	5
Jewish community <b>centers</b>	49	35	14	3
<b>Congregationally based J. education</b>	71	20	7	3
Jewish <b>museums</b> & other cultural centers	50	39	9	2
Other established <b>institutions</b>	17	51	28	4

an illustrative list of established agencies supported by these donors.)

Indeed, for a variety of reasons, some donors do find established, large institutions appealing. For one funder, giving to larger organizations “like JTS and UJA-Federation” is appealing because they have “rich resources to impact Jewish life in America,” (Female, 60-65).

Others comment:

“Supporting [the] federation is critical for the survival of the community. I am very much a community person,” (Male, 40-45).

“I prefer to give in a framework of an existing organization so that [the project] is scalable,” (Female, 40-45).

But these comments are, in fact, atypical among JFN donors. The results point to limited giving to established institutions on the part of

JFN donors as a group, perhaps a reflection of disenchantment with the established philanthropic system (see, for example, Cohen 2004; Tobin 2007, 2008). As such, the findings are particularly striking for this group of affluent, charitably minded, largely middle-aged, very Jewishly engaged philanthropists. Recall that only 56% made what they regarded, in their own terms, as a “very significant” gift to any established Jewish cause, and only 25% made very significant gifts to two or more categories of established institutions of Jewish communal life.

Given their demographic and Jewish identity profiles, one might expect that donors such as these would be the stalwarts of established Jewish philanthropic giving. Yet these funders are relatively unencumbered by commitment to the established institutional infrastructure of communal Judaism. Either JFN has drawn together an unusually independently-minded set of donors (one possibility), or these donors are representative of the diversification of Jewish philanthropic giving – a trend seen by some

as symbolic of communal fragmentation, and by others as the assertion of entrepreneurial philanthropic initiatives. Very possibly both processes are operating.

The characteristics of those more closely tied to the established Jewish communal institutions are both predictable and revealing. They include: identifying as Orthodox or Conservative rather than as Reform or non-denominational, and having more extensive Jewish educational experiences. Both traits point to fuller socialization and integration into the more conventional and established organized community.

#### **THE MIDDLE-AGED ESTABLISHMENT**

Perhaps less predictable, and noteworthy from a policy point of view, are the rather intriguing age patterns. Giving to established causes peaks with those 45-54 and declines thereafter. This age contour is consistent with the tendency of Jewish communal institutions to recruit individuals of that age for major leadership and other honorific positions. Anecdotal accounts suggest that younger adults often feel “shut out” of leadership in those agencies and that older veterans of Jewish communal life feel under-utilized, under-appreciated and under-recognized for their prior service and contributions. But it is apparently in the middle years (45-60 or so) that people are most likely to hold significant and meaningful positions and, it appears, respond with greater levels of giving to established Jewish institutions.

For the innovative and independent start-up endeavors, these results suggest two constituencies that may be especially open to recruitment as leaders and donors: younger adults (provided they have the wherewithal to give), and more senior veterans of Jewish life who may be looking for meaningful involvement in the wake of completing a decade or two of service in established Jewish communal life.

#### **SUPPORT FOR INNOVATION**

In addition to donating to established institutions, most JFN funders also support non-established, smaller and often innovative charitable causes. In response to our question, “Do you donate funds to any newer initiatives in Jewish life, including start-ups, projects, and other recently created initiatives outside of long-established agencies?” as many as 63% respond affirmatively, reflecting their support for newer initiatives of one sort or another, although the extent of their giving can not be ascertained in this survey. Anecdotal reports of grant recipients suggest, for the most part, the presence of hundreds if not thousands of smaller gifts, and relatively few significant awards and no “mega” gifts, to our knowledge.

To be sure, not many more make any contributions to innovative causes than the 56% that make significant contributions to established causes. The “news” lies in the implicit change in the philanthropic landscape that these figures imply. We have no data from 20 years ago, but it would be hard to expect that a collection of Jewishly engaged donors of significant means would be devoting as little of their giving to establishment causes and be as widely exposed to smaller, newer, innovative causes as these findings suggest for this group of contemporary donors to Jewish life. Not only was there no Jewish Funders Network 20 years ago, neither was there the vast, diverse and complex array of innovative causes. The phenomenon of the “Long Tail” has come to characterize Jewish philanthropy.

These innovative projects embrace a wide variety of substantive domains, as the distribution on page 20 clearly demonstrates.

The sheer diversity of missions that appeal to these donors is truly remarkable, as the large number of donors who check “other” testifies. “Other” refers to projects which, in their minds, do not fall within the list of major categories of mission offered them.

**In which of the following areas did you make donations to newer initiatives in Jewish life?**

	%
Jewish study	24
Social justice	22
Arts and culture (including Jewish music)	13
Jewish spirituality	13
Independent minyanim, or emergent spiritual communities	7
New media	6
Social networking	6
Environmentalism	5
Other	23

To obtain a more precise understanding of the “newer initiatives” they support, we have also asked the respondents to list up to three innovative projects they support (see the appendix for an illustrative list of those mentioned). We are struck by the relative absence of overlap: very few grantees were named by more than two respondents. In other words, JFN donors, as a group, have cast a very wide net over the hundreds and thousands of putatively innovative projects in Jewish life.

**SUPPORTERS OF INNOVATION: JEWISHLY EDUCATED AND COMMUNALLY INDEPENDENT**

The characteristics of those more committed to funding independent, innovative projects differ decidedly from those associated with giving to established causes. Donors most inclined to support independent, innovative projects report two seemingly contradictory tendencies: they tend to

possess high levels of Jewish education but low levels of conventional Jewish engagement.

Supporters of independent, innovative projects tend to report more extensive and diverse forms of **Jewish education** in their childhood and adolescent years. They are more Jewishly educated and educated in different ways (day school, youth group, summer camp, Israel travel, Hillel and Jewish Studies). Jewish education seems to strengthen their appreciation for the variety of objectives associated with independent, innovative projects.

Our in-person interviews reveal how a Jewish educational background establishes the template that allows would-be donors to appreciate the value of independent, innovative projects. As our field notes demonstrate, one donor reports that his lack of Jewish educational background clearly obstructs his ability to resonate with certain innovative projects.

One funder felt puzzled by the concern for Jewish spirituality and environmentalism, two hot topics for adults in their 20s and 30s. The funder specifically admitted that he doesn't ‘get’ what some innovative organizations do. He says, “It’s very difficult for me, someone who is not from a Jewishly literate background, to get my hands around independent minyanim.” His lack of identification leads to his lack of emotional connection to these projects, which in turn leads to his lack of support. (Male, 65-70.)

Contrasting with this particular funder’s view that his relative lack of Jewish education makes it difficult for him to value innovation in the spiritual community, we of course found funders with quite different views, and not just among current supporters of such efforts. “[Young people]

are making the effort to create emerging spiritual communities; I could see myself supporting them because I think there are different needs for the next generation,” (Female, 55-60).

The impact of one’s childhood Jewish education on adult philanthropic decision-making is complex and, in some ways, paradoxical. On the one hand, education gives a person the capacity to appreciate the value of innovation in certain domains. On the other hand, education promotes and undergirds conventional religious, spiritual and denominational positioning which, it turns out, works to undermine support for spiritual innovation.

We know from this sample and also from larger studies of the Jewish population that the extent and intensity of Jewish education is associated with denominational traditionalism. That is, with respect to level of Jewish education, Orthodox are the highest-scoring, followed in turn by Conservative, Reform and non-denominational Jews, in that sequence. For this reason (and as noted earlier), it is all the more surprising to observe that **non-denominational** funders – those who abjure the three major denominational labels – are those reporting the *most* frequent support of independent, innovative Jewish projects. This statistical relationship emerges as all the more impressive in light of the low levels of intensive Jewish educational experiences among the non-denominational funders in this sample.

The relationship is further underscored by yet another pattern in the data. Consistent with this finding is that those with **low levels of conventional Jewish engagement** (measured by membership in a congregation, monthly service attendance, repeated travel to Israel and having mostly Jewish friends) are more likely to fund independent, innovative projects than those with many signs of such involvement.

It seems, then, that conventional Jewish engagement actually works to undermine openness to independent, innovative start-up projects.

Donors who are conventionally affiliated and engaged in Jewish life maintain closer social ties with the more established, long-standing Jewish communal institutions. In addition, their very involvement in conventional Jewish life is itself an indicator of relative satisfaction with current options for Jewish involvement and can engender both commitment and loyalty to prevailing options and institutions. Those on the periphery of the organized community, rather than in its center, seem more interested in supporting innovation.

In short, the Jewishly educated and socially unconventional – those with the capacity to appreciate innovation who are somewhat separate from established patterns of Jewish engagement – exhibit a somewhat greater tendency to fund independent, innovative start-up projects. Both dimensions operate independently of one another, producing a greater willingness to consider innovative, off-beat and non-conventional (or anti-conventional) ideas. The ideal donor for such projects is someone with a strong Jewish education (be it through the usual channels or private study) and someone whose Jewish involvement is idiosyncratic, individual, unconventional and, in some ways, unaffiliated. Those with extensive Jewish education and those with limited ties to conventional Jewry are not that unusual, but those combining the two traits are rare indeed.

#### **INNOVATION ORIENTATION, BUSINESS ORIENTATION AND SOCIAL PROGRESSIVISM**

Throughout our in-person interviews, the variety of autobiographical and personal identity characteristics that influence philanthropic decision-making becomes apparent. Giving is a personal act in at least three senses of the term: 1) It expresses the personal values, passions and commitment of the donor; 2) It engages the private and public personas of the donor with the

beneficiary; 3) It reflects highly personalized and individualized approaches to giving: “If you know one donor, you know one donor.”

Donors are quite clear about the personal fulfillment they derive from their philanthropic work:

“I want to my gifts to reflect who I am,”  
(Female, 45-50).

“We were not raised with peak ties to the Jewish community in terms of our relationship with the federation, [but] the Jewish piece was always conveyed as something important in our household.... The Jewish identity piece is an important part of who I am but does not define all of who I am,” (Female, 45-50).

Jewish giving is very much tied up with a Jewish identity. To take two examples:

One New York funder, a daughter of Holocaust survivors, who had become distant from Jewish life, found her way back in to Jewish life through her philanthropy. When her father died, he was buried in Israel, and that led her to become more conscious of the centrality of the State of Israel to her Jewish identity. She started to support AIPAC and then other Israel-advocacy groups in part because she sees them strengthening Israel, and in part as an expression of her strengthened identity as a Zionist. (Female, 55-60.)

Another funder supports a well-known Manhattan synagogue because it was a warm and open place to her family at the time of her father’s death. They were immediately welcomed to say kaddish there. From this experience, she understood what an important model a synagogue community can be, and now, her family foundation supports synagogue leadership as the key to ensuring that synagogues are open and welcoming spaces. (Female, 50-55.)

To systematically explore the connection between donors’ biographies and their philanthropies, we have listened closely in our interviews to the ways in which people describe themselves: innovator, pioneer, strategic, responsible, traditional, progressive, inclusive, entrepreneurial, risk-taker and so forth. We have set these characteristics before our survey respondents, asking them whether these terms characterize them, and whether these characteristics are important parts of their personality in terms of influencing their philanthropic decision-making. The results demonstrate the diversity of characteristics that come into play and the varying extent to which each matters.

Through statistical analysis, we can determine that these 16 characteristics actually cluster in such a way as to represent three motivational dimensions (see box on page 24):

- Innovation orientation;
- Business orientation;
- Socially progressive.

Rather than seeing donors’ motivations as random, chaotic and idiosyncratic, this formulation makes the claim that these three motivational

**When you make philanthropic gifts to Jewish causes, which of the following characteristics or identity components are important to you?**

	Not a way I (we, they) see myself	Not important	Somewhat important	Very important
Fiscally responsible	3	4	23	70
Responsible	2	3	27	68
Inclusive	9	11	37	43
Solid citizen	12	10	38	40
Innovator	7	17	37	39
Entrepreneurial	5	22	36	37
Business-oriented	9	19	39	33
Pluralist	15	17	36	32
Seeking reliability	6	10	54	30
Pioneer	12	27	32	30
Risk-taker	15	26	42	18
Activist	17	33	33	17
Socially/politically progressive	26	31	27	16
Feminist	25	38	22	16
Socially/politically liberal	25	33	30	12
Socially/politically conservative	50	33	9	7

dimensions are the most critical for understanding donor psychology.

The **innovation orientation** emerges in a number of ways. Take the following examples, all of which reflect an enthusiastic embrace of innovation as critical to Jewish vitality and continuity.

“It’s important for us to experiment with Jewish ritual life. There’s so much richness and creativity. Judaism has never been static; we shouldn’t start being static now,” (Female, 60-65).

“We are in a time of ferment, change, innovation and experimentation. That

aspect is becoming Jewish communal life. Jewish communal life is no longer as rigid as it once was – with a synagogue, a JCC and a federation. As the community changes and that model breaks down, creativity is happening, which will create more resources going to smaller organizations. Giving to smaller organizations will become a part of the norm. Before, these small organizations used to be a part of the outliers. Now that is no longer the case,” (Male, 60-65).

“Foundations will not sit back and say, ‘This is too chaotic;’ they will recognize

**Motivational Dimensions and Their Key Words**

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**Innovation orientation**

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Pioneer

---

Risk-taker

---

Entrepreneurial

---

**Business orientation**

---

Solid citizen

---

Responsible

---

Seeking reliability

---

Fiscally responsible

---

**Socially progressive**

---

Socially/politically liberal

---

[Not] Socially/politically conservative

---

Feminist

---

Activist

---

Inclusive

---

Pluralist

---

that this is the vanguard and the future of Jewish life and decide where and how they will get involved,” (Male, 60-65).

To be sure, not all JFN funders score high on innovation orientation. Some are indeed wary of the focus upon the next generation, be it for moral reasons or out of concern that young people’s endeavors provide no sustainability. The inter-generational tension in these remarks is palpable and clearly expresses resistance to celebrating innovation.

“We Jews are not a people who says, ‘Young people are the be-all and end-all.’ Our tradition says, ‘From generation to generation.’ To assume that those

people who are in the winter of their lives have all the information and will not listen to those [of us] who are in the summer and spring of our lives is a mistake. There is a collaboration between generations. To say, ‘One generation really knows best’ is not good,” (Male, 40-45).

Another funder remarks, “While I want to meet [young people] where they are... I also want to impart some of my own values, which are different values,” (Female, 55-60).

Or, take the following:

One philanthropist says that he doesn’t want to support a project that won’t last beyond a few years and that is thought up by someone “in their 20s who will soon get married, have kids and move to the suburbs.” He is skeptical about supporting them because, “They will be gone in a year or two.” (Male, 55-60.)

Some have another reason for failing to “light up” to innovation. In many cases, they see Jewish innovation as contrary to deeply held traditional values. As one funder says, “If what is going to connect us to Judaism is the environment, then we have a big problem, because it makes the Five Books of Moses obsolete,” (Male, 40-45). Or, as another puts it, “Judaism shouldn’t be about becoming a social justice faith. Why does it take a tragedy like Darfur and Katrina or Trees to get people to identify Jewishly?” (Male, 40-45).

Still others are innately skeptical of innovation, in a sense, reflecting the view of Ecclesiastes, “What

has been is what will be, and what has been done is what will be done; there is nothing new under the sun,” (1:9).

One funder describes himself as a traditional funder and gives generously to Federation, Jewish camping and other local and regional causes. “I am always interested in listening – but I think that if there is a new and innovative project, then there are probably many out there just like them.” He is very reluctant to support the work of social entrepreneurs, because from where he sits, for every new and innovative project that comes along, “there are older and more established programs that already do 80% of the work.” (Male, 40-45.)

In short, the extent of innovation orientation certainly varies. For some, the rapidity of change in society and Jewish life demands a readiness to change and a special attention to the approaches and thinking of younger Jews. For others, the very same changes call for renewed attention to enduring Jewish values, wisdom and communal institutions.

The **business orientation** manifests itself in several ways, most clearly in the application of a business-oriented perspective to the evaluation of Jewish charitable causes. We find one expression of this orientation in the tendency to see the marketplace as the ultimate test of the value of charitable endeavors, as the following examples from our field work illustrate.

One funder believes that sustainable projects are ones that end up paying for themselves at some point. “I shouldn’t be giving to things that users should be paying for.” Some projects with potential paying consumers, he believes, should clearly pay for themselves. The absence of a large enough market to support these

projects, he says, is not his concern and may, in fact, speak poorly of their value or need. (Male, 55-60.)

Another funder is not interested in paying for projects that participants themselves could pay for directly. She gives the example of one project holding Jewish learning conferences saying, “Fee for service is not interesting to me, it doesn’t interest me to help fund someone else’s experience. But if someone came to me to ask about scholarship, that is something else, and that is interesting to me.” (Female, 50-55.)

For these funders, the “consumers” of the social entrepreneurs’ “products” should support the organizations over and above their philanthropic support. The idea of supporting an organization because it is important for the “common good” of Jewish life is not a significant enough motivator for some to give philanthropically.

Clear relationships emerge in our statistical analyses that link the motivations to various charitable outcomes. In particular, the three philanthropically relevant motivations (innovation orientation, business orientation and social progressivism) serve to differentiate those with a preference for more established Jewish communal causes from those with a readiness, or inclination, to support independent, innovative projects in Jewish life.

It turns out that an **innovative orientation** is moderately related with both sorts of giving, i.e., to both establishment and innovative causes. Among the independent, innovative projects, the innovative sensibility is most closely connected with support for efforts aimed to ensure Jewish continuity among young adults. This finding suggests that donors to any cause (establishment or innovative) tend to think of themselves as innovative. One implication is that nurturing

the innovative disposition among donors can have generalized positive effects on levels of giving.

At the same time, the innovative orientation seems to run contrary, at least empirically, to interest in social service projects: those who score higher on the penchant for innovation index score lower on interest in funding projects offering assistance to needy individuals. One possible explanation for this relationship is that social service projects are seen as the work of established organizations like the federation system, and are not seen as the work of innovative and independent organizations (although, exceptions such as AVODAH and AJWS must be noted).

A **business orientation** serves to dissuade potential donors from supporting independent, innovative projects. That is, those scoring high on business orientation are considerably less likely to support independent, innovative projects. This inhibition is especially associated with opposition to politically or culturally progressive causes, suggesting that donors with a strong business orientation are generally not very enthusiastic about the progressive agenda.

At the same time, donors who score high on the business orientation index seem more willing to fund independent, innovative projects in the areas of Jewish education and the Jewish survival agenda. Business orientation, then, does not contravene support of all innovative projects, but it does run counter to some.

Those who score low on the business orientation index may have other motivations in mind when thinking about their giving. For reasons having to do with opportunity for hands-on involvement, they may, in fact, prefer funding projects that are newer, smaller and less firmly established.

One funder explains, that which is gained by giving to large, stable organizations is lost in the degree of personal impact that she can have. She says that she doesn't want to give to organizations that have a very broad base of support and a lot of people who will step in to do the work. Instead, she says, "I want places that I can add value, that are needy." The role of a funder, according to her, is to get involved on the board and serve as an advisor to the Executive Director regarding setting priorities, helping them with "knowing how to play in the world." (Female, 60-65.)

If the business orientation deters would-be donors from supporting start-up projects, the opposite is true for the commitment to **social progressivism**. Those who see themselves as more liberal, more committed to social justice and more oriented to an activist stance in general are also more inclined to support independent, innovative projects. But this observation applies primarily to the many progressively-oriented endeavors seeking assistance. In fact, the more progressively minded are less likely to contribute to what we call the "Jewish survival agenda," projects focused on Israel advocacy and Holocaust education, as well as Jewish education.

And if progressivism works in one direction, conservatism – be it cultural, religious or economic – can run contrary to interest in funding certain independent, innovative projects. For example:

"I believe that some of the folks who are environmentalists see it as their new religion. It is not Judaism, it is environmentalism." While social justice may be capturing the

imagination of many young Jews today, some funders, see this as a problem. According to this funder, Judaism shouldn't be about becoming a social justice faith; it should be about "how to live a more meaningful and better life." (Male, 40-45.)

One funder says that "you can't just have your own criteria, where you expect everyone to do for you but you are not willing to do anything for the community." One concern she has with donating to smaller start-ups that are about producing and purveying Jewish culture is whether participation in these cultural activities and events will lead to any kind of genuine future commitment. "Is it education or entertainment?" she asks. (Female, 55-60.)

## **CHARACTERISTICS OF THE PROJECTS: THE APPEALING AND THE UNAPPEALING**

The philanthropic act connects a donor with a beneficiary. So, what is it about the projects that attracts some donors and repels others? Just as biographical experiences, Jewish identities and philanthropic motivations all influence an interest in philanthropic giving, so too do the qualities of the beneficiaries.

In our in-person interviews, we learn of the wide range of characteristics of the beneficiaries that can matter to actual and prospective donors. Our survey also presents respondents with selected features to discern their reactions, which could range from "appealing" to "unappealing," with the additional possibility that it "wouldn't matter." We learn that not only do a wide variety of charac-

teristics matter to prospective donors, we also find a considerable number of items where little consensus prevails.

That said, a composite picture of the attractive project does emerge. It is led by a leader who inspires confidence, possibly an experienced professional; it's fiscally accountable, scalable and replicable, and consistent with the donor's strategic approach to grant-making. But beyond these features, donors divide on that which they find more appealing: whether it's risky or safe; whether it's local or national; whether it's new or well-established; whether it accords with the values of the American Jewish community or challenges them; and whether it affords the donor a chance for genuine involvement and oversight. The table on page 28 clearly reports the matters of consensus and dissention.

At the same time, as with donor motivations, all is not random and chaotic with respect to the features of the beneficiaries. Our analysis revealed that the 21 features in the table could be reduced to five major dimensions: confidence-inspiring leadership; invites involvement; established and certain; starting and risky; national scale. Donors sort themselves on these five dimensions, and some of these dimensions influence their preferences for established charities or independent, innovative projects.

In particular, donors who seek hands-on involvement and those looking for a national impact are more drawn to the independent, innovative startup projects. On the other hand, those reporting high levels of giving to established institutions are not surprisingly motivated by the dimension we have labeled "Established and certain."

To be sure, we need to factor into our interpretation the likelihood that even on anonymous surveys, respondents present socially desirable versions of their personalities. In this study, donors like to see themselves as "strategic," as many so responded. In addition, two-thirds or more claimed that the visibility of the project or

**Suppose you were approached by a project in Jewish life for your support. Below are several features that may pertain to this project. For each feature, indicate whether you think you'd find it appealing, unappealing, or it wouldn't matter much to you.**

	Appealing	Un-appealing	Wouldn't matter
<b>Very Appealing</b>			
I'm inspired by the leader.	90	2	8
It has first-rate fiscal accountability.	90	2	8
It is consistent with my strategic approach to grant-making.	87	2	10
It's scalable and able to be replicated.	80	3	17
It's led by an experienced professional.	70	5	25
<b>Either Appealing or Wouldn't Matter</b>			
It's new, but up and running.	55	4	41
It gives me a chance to get involved in a hands-on way.	46	8	46
The project is well-established.	44	10	47
I would exercise some genuine oversight.	42	13	45
Seems like a sure thing.	42	12	47
It's consistent with the values of the organized Jewish community.	42	4	54
It's local in scope, rather than national.	36	7	57
It has lots of visibility.	36	6	59
It's led by a passionate amateur.	33	27	40
It challenges some values of the organized Jewish community.	33	17	51
<b>Generally, Wouldn't Matter</b>			
It's a small project.	25	9	66
It's national in scope, rather than local.	24	15	62
Lots of other people I know support it.	24	6	71
It has little visibility.	6	27	67
<b>Unappealing</b>			
It's high-risk, big chance of failure.	8	63	29
Its financial reporting is limited.	5	78	17

### **The Features of Beneficiary Projects: Five Major Dimensions**

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#### **Confidence-inspiring leadership**

- It's led by an experienced professional.
- I'm inspired by the leader.
- Lots of other people I know support it.
- It is consistent with my strategic approach to grant-making.

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#### **Invites involvement**

- It's scalable and able to be replicated.
- It gives me a chance to get involved in a hands-on way.
- I would exercise some genuine oversight.

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#### **Established and certain**

- Seems like a sure thing.
- The project is well-established.
- It's new, but up and running.

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#### **Starting and risky**

- It's a small project.
- It's high-risk, big chance of failure.
- It has little visibility.
- (NOT) It has lots of visibility.

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#### **National scale**

- It's national in scope, rather than local.
- (NOT) It's local in scope, rather than national.

the involvement of other people they know as donors would have little bearing upon their philanthropic decision-making. In point of fact, our in-person interviews testified to precisely the reverse inference.

### **CONFIDENCE-INSPIRING LEADERSHIP**

For most philanthropists we interviewed, strong leadership is critical to their decision to fund an

organization. While funders say that they need to agree with the mission, vision and values of the organization they support, the power that the leadership holds in generating excitement for an idea goes a long way. As one philanthropist says bluntly, "a program is as good as its leader," (Female, 50-55). One funder commented that she would fund anything that a particular non-profit professional does because "she is strategic and smart," (Female, 65-70). Another funder says, "When there is an organization with a star at the front... I am right there.... I look for energy and that the person can inspire," (Female, 65-70).

A philanthropist's personal connection with the Executive Director is critical. One funder's strategy for giving is relationship-based. She says, "I think about it [my strategy] as the people who I want to get to know, and how I want to support them.... I am very involved in XXX because of YYY," (Female, 65-70). This same funder, when speaking of her husband who is also a generous philanthropist, says, "If he sees talent, he will support [the organization]."

### **INVITES INVOLVEMENT**

Funding independent, innovative projects can give funders an opportunity to "get their hands dirty" with like-minded funders and Jewish professionals alike. A funder in his 60s who had been very involved in developing a new JCC, says that he was turned off from being involved in UJA because, as he says, "I don't want to be a part of a long allocation process in which I am working with many other 'self appointed experts.' I want to work with the professionals, get involved," (Male, 65-70).

The involvement generates other rewards as well. Speaking about the projects he supports, one funder remarks, "I get a kick out of it," (Male, 65-70). He talks about the access that his financial support

of an Israeli policy-making organization has given him. He has gone to Israel several times, met leading figures in Middle Eastern politics, and is now a part of a community that supports the same cause.

### **ESTABLISHED AND CERTAIN**

Some funders are reluctant to give to an organization that is just a “flash in the pan” and doesn’t “have legs.” Organizations like UJA Federation and JDC have the capacity to bring projects to scale. Smaller projects, which are only three to four years old and have been started by younger social entrepreneurs, aren’t as captivating to some funders because their reaches may be more limited.

If a part of what funders “get” by contributing to Jewish organizations is a social group with whom to associate, then smaller, lesser-known, independent, innovative projects may not provide these funders with the kind of social outlet they seek. One funder comments, “If most people want to give money so that they can be a part of a club, then smaller organizations cannot offer them that,” (Female, 45-50).

The point is strengthened by numerous comments that point to the value of prestigious social networks, especially for newer, under-recognized, independent, innovative projects. The contrast with more established causes comes across vividly in one interview, illustrating the power of social class and high-status affinity groups. One member of a family foundation talks about her foundation’s support for Birthright Israel saying, “Michael Steinhardt came to my father... Steinhardt pitched it to him, and my father was taken by it,” (Female, 45-50). One of the things that encouraged the foundation members to continue their support is that they found themselves in good company. “We like to know that there are other funders on board that we know and think highly of,” (Female). In this example, we see that when one leading member

of the donor class supports a project, others more easily follow suit.

### **STARTING AND RISKY**

One funder in this study explicitly prefers to fund high-risk projects. She wants to “allow for many flowers to bloom, nurture them and let those that will die out naturally, die out,” (Female, 35-40).

At the same time, some funders are averse to supporting smaller, newer ventures for reasons connected not so much with their potential for impact but with the difficulty in reviewing and understanding numerous smaller grants. They may recognize that start-ups are potentially valuable but feel that they as funders lack the internal capacity to vet so many projects. One funder says, “It has become our preference to fund organizations that have been around and are prepared for the next stage of growth. While we recognize the need for new organizations, [funding them is] not a niche for ourselves. One reason is that it is overwhelming to sift through so many proposals. With lean staff, we identify a small number of organizations and give large grants, which means being really selective about what we fund,” (Female, 45-50).

Some funders find that the number of new projects is too many and too difficult to navigate. One says, “Two to three years ago we made this decision [to not support start ups]; we found the landscape difficult to navigate. There is a lot of duplication.... The field seems so crowded for a funder who is not ‘in the know’ about all the permutations of all the organizations. [These organizations should] clarify how they distinguish themselves,” (Female, 45-50).

**SUMMARY OF RELATIONSHIPS WITH ESTABLISHED AND INNOVATIVE PHILANTHROPIC GIVING**

The chart below summarizes the relationships reported above. “Positive” means that those possessing the characteristic, or scoring higher

on the appropriate scale, are more likely to make contributions to the indicated type of cause (established or innovative). “Negative” refers to the reverse relationship. For example, those scoring higher on business orientation are less likely to contribute to independent, innovative initiatives.

**Summary of Relationships of Characteristics and Motivations with Giving to Established and Independent, Innovative Causes**

Characteristic	Established agencies	Independent, innovative projects
Jewish educational experiences		Positive
No denominational affiliation		Positive
Conventional Jewish engagement	Positive	Negative
Middle age (45-54)	Positive	
Innovative orientation	Positive	Very positive
Business orientation		Negative
Socially progressive		Positive
Confidence-inspiring leadership is appealing		
Invitation to involvement is appealing		Positive
Established & certain is appealing	Positive	
Just getting started & risky is appealing	Negative	Positive
National scale is appealing		Positive

## CONCLUDING REFLECTION

### From Wisdom to Innovation: Bridging Philanthropic Disconnect

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OUR RESEARCH HAS UNCOVERED A “JEWISH philanthropic disconnect.”

On one side of the philanthropic disconnect are perceptive and passionate donors. They are perceptive enough to see the effects of deep-seated changes in culture, technology and the integration of Jews into American society. All these changes, singly and together, challenge the established institutions that have so effectively served current and preceding generations of Jews for several decades. In addition, these donors are passionate (and independent) enough to seek new ways to engage the next generation of American Jews. In so doing, such funders seek to ensure a vital Jewish future, albeit in a world very different from the one they have known. Yet, despite their readiness to innovate and interest in investing in the Jewish future, they “disconnect” from many of those who embody the Jewish future, and who may be among the best-positioned to enrich the Jewish future.

On the other side of the philanthropic disconnect are innovative social entrepreneurs. These are the individuals and communities creating new forms of Jewish life adapted to the emerging ethos, culture and technology of early 21st century America. They are passion-driven more than they are institutionally loyal, valuing personal meaning over ideological affiliation. They prize diversity over divisiveness and prefer empowerment to control. They seek to connect more than command. They are “native innovators,” fully immersed in the culture that gave rise to them, and fully a part of the culture that calls into question the very Jewish institutional system that served their parents and developed their commitment in their younger years.

Their innovativeness makes them adept and adapted for the emerging era of Jewish life. But

this same innovativeness obstructs their ability to communicate with those on the other side of the Jewish philanthropic disconnect – the donors who share their concern for the American Jewish today and tomorrow, but who do not share so readily or completely their remedies for what ails the much beloved creature, “America Judaica.”

This research identifies three major classes of motivation that shape donors’ resonance with innovative projects in Jewish life: the innovation orientation, the business orientation and the commitment to social progressivism. Each points to obstacles facing donors and innovators seeking to bridge the Jewish philanthropic disconnect, and each also points to opportunities to do so.

While many, if not most, donors think of themselves as innovation oriented, our interviews and survey analysis have uncovered many predictable and understandable areas of resistance to innovation. Many sources of resistance to innovation stem from the very shift in culture in the larger society and in Jewish life that make innovative endeavors so valuable in the first place. Innovative endeavors challenge inherited Jewish values, they challenge prevailing institutional modalities, and they make use of new and often unfamiliar technologies. In some cases, it is just a matter of old wine (traditional symbols and values) in new bottles (modes of organization). But, to be sure, it is also a matter of Jewish innovators devising new ways of being Jewish and expressing their Jewishness in ways that do, indeed, run counter to inherited practices and sensibilities. To older donors, younger innovators often seem to not only reject and disdain the wisdom of their parents (which can be hurtful,

but understandable) but also the wisdom of Judaism (which is destructive, if not reprehensible).

A strong business orientation has served most donors (and their parents) quite well. A good number owe their worldly success to astute assessment of risk, attention to metrics, sound management, strategic thinking, financial accountability, expert personnel, scalability and related features. Many of the same ways of thinking and deciding have also served them well in the governance of major established communal institutions over the years. But with all its proven value and usefulness, a conventional business oriented approach to investing in innovative endeavors in Jewish life can easily lead to missed opportunities and mistaken judgments. Creative personalities, especially younger creative personalities, are notoriously ill-equipped to think or communicate in ways that are most easily appreciated and understood by those imbued with the managerial ethos of American business enterprise. And even if they were so equipped, so much militates against their being able to satisfy the usual demands of business-oriented philanthropists. The organizations they run are small and fledgling, with new, under-trained and perhaps under-supervised staff. They operate in the not-for-profit sphere where the usual metrics are hard to come by and difficult to devise. And, by their very nature, they are innovating: developing new and untested ideas for new and emerging “markets.”

The area of social progressivism, the third rubric of donor motivations, poses a third area of potential disconnect between potential donors and prospective innovators. While American Jews may be situated politically and culturally to the left of the political spectrum, Jewishly passionate donors have good reason to adopt more centrist or even conservative positions. These are, after all, Jewish donors. As such, they share two characteristics: Jewish commitment and the financial capacity to express their commitment in philanthropy. As Jews, many come to their Jewish commitment by

way of traditional Judaism, be it Orthodoxy or other tradition-minded approaches to Jewish life, and therefore to life in general. As donors, many have come to their financial wealth by way of years of successful involvement in a business world that is not particularly known for its innate sympathy with progressive causes.

The Jewish social entrepreneurs, for their part, are living in an age that particularly prizes the lowering of historic social barriers and the removal of social stigma attached to non-mainstream groups in society. The fights against global warming, racism, sexism and poverty have animated much of the younger generation, especially the more socially conscious, among whom are counted disproportionate numbers of Jews. The Right/Left tension between more conservative donors and more progressive innovators is not a necessary consequence of this situation, but it is at least a logical outcome, and one which serves to limit the appeal of many innovative endeavors, whether they legitimately deserve the “progressive” label or not.

If committed Jewish donors and creative Jewish social entrepreneurs are to work together effectively for a better Jewish future, they will need to systematically address these tensions. Grantees and potential grantees will need to more fully appreciate the extent to which many of their innovations require explicit rhyme and reason – the value and the need for these ventures are not always intuitively obvious. And the implicit messages the projects convey regarding inherited Judaism is not always seen as flattering or complimentary. Innovators will need to work to develop the capacity to address the legitimate business-oriented concerns of their real and prospective donors. And they will need to more firmly connect their social objectives to enduring Jewish values and sources.

Donors, for their part, will need to recognize that young innovators represent the instruments of their desires to shape a better Jewish future.

As such, they will need to approach the culture and ethos of the younger generation with greater curiosity and openness. And they will need to help innovative social entrepreneurs develop the capacity – or acquire the professional assistance – they need to address the concerns associated with a strong business orientation.

To be sure, these are not easy tasks – either for funder or innovator. But the failure to attend to the Jewish philanthropic disconnect, the gap that divides

the wisdom of the ages from the innovation of the current moment, will mean that neither committed funders nor passionate entrepreneurs will fully realize their objectives. And only a successful partnership of creative and passionate donors with creative and passionate innovators will lead to a vital Jewish life that is attuned to the Jewish heritage, meaningful to the Jewish present, and able to sustain the Jewish future.

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## **APPENDICES**

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1. Innovative initiatives and institutional charities supported by the respondents.
2. Qualitative interview discussion guide.
3. Characteristics of the in-person interviewees.
4. Letters inviting JFN affiliates to participate in the web-administered survey.
5. Survey instrument.

## PROJECTS SUPPORTED BY JFN SURVEY RESPONDENTS:

The “Innovative” and the “Institutional”\*

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\*Classified below largely according to the definition used by the respondents.

### INNOVATIVE PROJECTS

A.H.A.V.A.: English Learned as a Natural Method	Hazon Yeshaya
Aging in Place	Heschel Center: Educational Fund
AJWS	Interfaithfamilies.com
Alma	IPCRI
Arava Institute	Israel 60 Years - Local Community Activity
Arts Fest	JECEI Initiative
Ashoka	Jerusalem Battered Women’s Shelter
AVODAH: The Jewish Service Corps	Jewish Camp Herzl
Battered Women’s Shelter in Beer Sheva	Jewish Coalition for Service
Beit Morasha of Jerusalem	Jewish Early Education Initiative
Building Bridges	Jewish Film Festival in Jerusalem
Birthright Israel	Jewish Funds for Justice
Brit Tzedek v’Shalom	Jewish Learning Institute
Center for Jewish-Arab Economic Development	Jewish Outreach Institute
Center for Women’s Justice	Jewish Teen Foundation Board
Centropa	Jewish Youth Connection
Common Denominator	Jewish Youth Philanthropy Institute
Community Advocacy (Ramat Eshkol, Lod)	Jgooders.com
David Project	JOFA
Delet - A Day School Teacher Training Initiative	Joshua Venture
Economic Empowerment for Women	JTFN
Face-to-Face Youth Philanthropy	Just One Life
Fidel	Kav La’oved
Film on Sexual Abuse in Orthodox Communities	Kavana
Foundation for Jewish Culture	Kehilat Yedidya
Galil Projects	Keshet (GLBT)
Gift of Life Bone Marrow Program at Maimonides School	Kfar Galim Youth Village
Goldring/Woldenberg Institute of Southern Jewish Life	Kibbutz Ketura for Plant Research
Good People Fund	Kollel
Gvanim in Israel	Kolot
Hazon	Lasova Israel
	Leket: The Israel Food Bank
	Limmud for Russian Speakers

Livnot U'Lehibanot  
Lod Community Foundation  
Maagalim  
Marpeh Lenefesh  
Masa Yisraeli  
Mayanot Institute in Jerusalem  
Mazon  
Mechon Hadar  
Mibereshit  
Media Central  
Meshi  
Moving Traditions  
Myjewishlearning.com  
Nechama – Jewish Response to Disaster  
NESS  
NETA  
New Jewish Teachers Initiative  
Nishmah  
Nishmat  
One Family Fund  
Paideia  
PANIM  
Passport to Jewish Life  
PELIE (Partnership for Effective Learning and  
Innovative Education)  
Pinat Shorashim, Israel  
Pluralistic 7-12 School in Jerusalem

Project Keshet  
Reality – TFA (Teach For America) ISRAEL  
Reboot  
Reut in Israel  
Rich Hodes Ethiopia  
Romemu Shul  
Root and Branches Foundation  
Shalem Center  
Shalhevet  
Shalva  
Shemesh - Arab and Jewish Israeli Summer Camp  
Shorashim  
Shuvu  
Slingshot Fund  
Storahtelling  
Tal Am  
Tel Aviv Soloists  
The Breman Southern History Project  
The Institute for Jewish Spirituality  
The Israel Project  
The PJ Library  
Tsfat Fund  
Tzohar – A Window Between Worlds  
Yedid  
Yisrael B'Yachad-Israel Together Project in  
Northern Galilee  
Ziv Tzedakah

#### **INSTITUTIONAL PHILANTHROPIES AND PROJECTS**

ADL for Mideast Conference  
AIPAC  
Aish Hatorah – Ashreinu/Jewish Awareness Movement  
Bar Ilan Scholarship  
BBYO Social Justice Program  
Ben Gurion University  
Bikur Cholim Hospital  
BJE

Brandeis Bardin Institute  
Brandeis University  
Bronfman Youth Fellowships in Israel  
Camp Mt. Chai in San Diego  
Camp Ramah in California  
Center for Deaf-Blind Persons  
Chabad Girl's School in Ofakim  
Chabad in the FSU

Chabad on Campus	Lod Foundation
Chai Lifeline	Machon Chana
Colorado Jewish Women's Fund	Mercas Hatorah Kollel
Contemporary Jewish Museum	Mesorah Heritage Foundation
Crane Lake Camp	Met Council on Jewish Poverty
Denver Campus for Jewish Education	Mikvah to Reno Chabad
Dorot	Mosdos Ohr Hatorah ("Cheder")
ELEM	Neot Kedumim
Facing History & Ourselves	NESS/ACAJE
Foundation for Jewish Camp	NIF
Friends of the IDF	Open University
Hadassah	Orh Torah Institute
Hadassah Herbal Research	OSRUI – Union for Reform Judaism
Hadassah in Memory of Foundation Founders	Partnership 2000 P2K UJA
Hausner Jewish Day School Scholarship Chal- lenge Grant	Progressive Judaism in Israel
Hebrew University	Rabbi Lieber Library AJU
HIAS	Research Endowment Jewish Home Lifecare
Hillel of Rockland County, NY	Roots and Branches Foundation
Hillel Study Abroad Initiative	Rose Community Foundation
Holocaust Memorial Center in Detroit	Shaarei Zedek Hospital
Holocaust Museum	Shatil
HUC-JIR	Sheba Medical Center
IDP of JDC	Shomrei Torah Synagogue
Illinois Holocaust Museum	Speakers Bureau of the JCRC
Israel Antiquities Authority	TALI Schools
JAFI	Taube Koret Campus for Jewish Life in Palo Alto
JCC Macabiah Games	Technion
JDC	The Washington Institute
Jewish Chaplaincy at Stanford Hospital	Transportation Program at JFCS
Jewish Council on Aging	Union for Reform Judaism
Jewish Family Service	Van Leer Jerusalem Institute
Jewish Funders Network	Western Wall Foundation
Jewish Home for the Aged	World Union for Progressive Judaism
Jewish Learning Institute	Yad Eliezer
Jewish Museum	Yeshiva University
Jewish Theological Seminary	Yeshivat Migdal Torah
Jewish Vocational Services	YU Kollel Toronto

**UNCATEGORIZED**

13 Plus Chai  
Green Light  
Hkol Hinuch  
Lahav  
National Council for the Child

New Linkage  
NOLA J-Grad Project  
Project Inspired  
Talmei Geulat Am Israel  
Yishai Sure Start

## DISCUSSION GUIDE FOR PHILANTHROPIC VALUES STUDY

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Hi, I'm NAME. We're conducting a study for The Andrea & Charles Bronfman Philanthropies and the Revson Foundation on the values and thinking of today's philanthropists of Jewish life. For years, many Jewish leaders have been concerned not only with the Jewish future but with sustaining the Jewish future. It's for this reason that we are speaking with people who have been active in Jewish life to learn of their visions and motivations for their philanthropic involvement. I want to thank you at the outset for agreeing to participate.

So, let's have a discussion about you and your interests and concerns. I do have a list of questions, but, knowing of the purposes of this study, feel free to take this conversation in any direction that you think we'll find most useful.

1. Do you have any questions or comments so far?
2. I'd like to begin with a little background. Tell me about yourself – kind of a thumbnail sketch of your life and your interests.
3. And how would you describe yourself Jewishly? What does being Jewish mean to you – and has that changed much over the years?
4. Now, tell me, if you will, about your philanthropic interests. What type of groups, causes or people do you support? Where do you make your most significant philanthropic contributions?
5. What are the top 3-4 donations you make? Why those?
6. (IF MARRIED) To what extent do you and your (WIFE/HUSBAND) discuss your contributions? Who makes which sorts of decisions about where to give? How do you two differ in your thinking about where to give and how much to give?
7. Do other people aside from your husband/wife play a role in your philanthropic decisions?
8. How do you divide your philanthropy between specifically Jewish and non-sectarian causes?
9. Do you support any efforts in the area of Jewish cultural or spiritual life, or in some sort of Jewish education? Why or why not?
10. In the Jewish domain of your philanthropy, to what extent are your donations focused on institutions in your local area, and to what extent are you giving to things that operate on a more national level, not specifically in your own community?

11. Do you find yourself supporting any projects that are just getting underway or that have been around only for 3-4 years?

12. Can you tell me a little bit about the process that leads to the development of your eventual funding priorities? To what extent would you say you have a funding strategy or some overall conception for how and why you make your decisions?

13. I'd like you to think about an area of Jewish life that you care about. What might that be? My question is: if you were approached to support something that was out of the ordinary and recently launched in this area, what concerns might you have about supporting a newly conceived project? Would you be concerned that the idea was new or that the principals are relatively young and inexperienced? What would help you overcome these concerns?

14. As you probably know, a good number of young people – people in their twenties and thirties – have been exploring ways of being Jewish that are different from their elders. Some are starting new spiritual communities, such as Hadar in New York or Ikar in Los Angeles; some are involved in promoting Jewish music, such as Matisyahu; others are engaged in advancing one or another social cause, such as with Darfur or volunteering in the developing world with AJWS. Common to all of these is that they're a bit edgy, if not downright critical of the established ways of doing things in the Jewish community. If you were approached to support such projects, how do you think you'd react?

15. If you could invent a project to sustain Jewish life in the next generation, what would you invent? What would you want to support if only effective and imaginative people were involved?

16. Do you have any comments you'd like to add? Anything I may have missed that I should know about?

Thank you.

## CHARACTERISTICS OF THE IN-PERSON INTERVIEWEES

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Total number: 17

<b>Gender</b>	<b>Frequency</b>
Men	8
Women	9

<b>Age</b>	
60-70	6
50-60	5
35-50	6

<b>Location</b>	
Northeast	14
Midwest	2
South	1
West Coast	0

<b>Denomination</b>	
Orthodox	0
Conservative	5
Reform	9
Post-denominational	2
Secular	1

<b>Donor Status</b>	
Family Member	3
Family Member/Professional	2
Individual	11
Professional	1

<b>Total Giving</b>	
\$4 million or more	4
\$2-4 million	4
\$500,000-2 million	3
\$500,000 or less	6
<b>Areas of Giving</b>	
Social justice initiatives	9
Jewish learning	7
Federation	6
Advocacy for Israel	6
Outreach to intermarried families	5
Gender issues	4
Jewish day schools	4
Jewish university programs	4
Spiritual communities	4
Strengthening young people's ties to Israel	4
Identity-building programs for adolescents	3
Synagogues	3
Community service	2
Infrastructure for social entrepreneurship	2
Jewish identity-building for Jewish young adults	2
Social Services for the aged	2
Social Services for children	2
Environmentalism through a Jewish lens; JCCs; Jewish museums and cultural centers; leadership development; promoting co-existence between Israelis and Palestinians; arts and culture	1 apiece

## **E-MAIL INVITATIONS TO THE SURVEY**

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FROM MARK CHARENDOFF

Subject: The JFN 2009 Study of Jewish Philanthropic Values

In the next 24 hours, you will be receiving a survey from the well-known sociologist Prof. Steven M. Cohen asking you about how your interests, passions and concerns inform and influence your philanthropic giving. The recent economic downturn, with its adverse impact on donors and beneficiaries, only heightens the need for a better understanding of the philanthropic community, and of the important work that it does to make the world a better place. I am writing to strongly encourage you to respond to this very important survey.

Your answers to this survey are confidential. We, at the Jewish Funders Network, will not see any of your individual responses – we'll see only the summary report that Prof. Cohen will write.

This pioneering study of philanthropic giving among those involved in Jewish charitable causes in North America will inform us all about how we think about and embody Jewish philanthropic values.

Thank you in advance for your help.

Sincerely,  
Mark Charendoff, President  
Jewish Funders Network

12 HOURS LATER

Subject: From Professor Steven M. Cohen – The JFN 2009 Study of Jewish Philanthropic Values

- What values inform the decisions of today's Jewish philanthropists?
- How do they go about deciding among several appealing and worthy causes?
- What are their interests, passions and concerns?

These are some of the questions we're addressing in this survey of Jewish philanthropists. Yesterday, Mark Charendoff wrote to urge you to participate in this study – here it is.

The link below will take you to the survey, which takes about 10 minutes to complete. No one at the Jewish Funders Network will see your individual responses; they will only see a summary report.

I would very much appreciate it if you would take a few minutes and complete this on-line survey today. Just click on the link below:

Insert Link

If you have any comments or questions about the survey, you can e-mail me at [steve34nyc@aol.com](mailto:steve34nyc@aol.com).

Thank you in advance for your participation in this important survey.

Sincerely,

Prof. Steven M. Cohen

Hebrew Union College-Jewish Institute of Religion

10 DAYS LATER, NON-RESPONDENTS ONLY

Subject: Last chance: The JFN 2009 Study of Jewish Philanthropic Values

As you know, the leadership of the Jewish Funders Network and I have requested that you complete a short on-line survey in an effort to better understand your values and priorities as they relate to your philanthropic giving. According to our records, you have not yet completed the survey. This is now the official "LAST CHANCE" notice – we will soon be closing the survey and analyzing the results, and we very much want to hear from you so that we may include your views and experiences.

Please take 10 minutes, click on the link below, and share your views and opinions with us. The survey will close in the next few days so this is your last chance.

Insert Link

If you have any questions or problems accessing the survey, please e-mail me at [steve34@aol.com](mailto:steve34@aol.com).

Many thanks for your time and attention.

Sincerely,

Prof. Steven M. Cohen  
Hebrew Union College-Jewish Institute of Religion

NON-RESPONDENTS ONLY

Subject: From Prof. Steven M. Cohen: The JFN Study

In a few days I'll begin to compile results from the Jewish Funders Network study of Jewish Philanthropic Values. I'd like to include your views in my analysis.

As we all know, we're at a critical juncture that will sorely test both donors and the charitable agencies they (you) support. This study, in shedding light upon how Jewish funders arrive at their decisions, promises to be of both great interest and great usefulness.

Please do click on the link below to share your views and experience.

Insert Link

If you have any questions or problems accessing the survey, please e-mail me at [steve34@aol.com](mailto:steve34@aol.com).

Many thanks for your time and attention.

Sincerely,

Prof. Steven M. Cohen  
Hebrew Union College-Jewish Institute of Religion

## THE JFN 2009 STUDY OF JEWISH PHILANTHROPIC VALUES

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### DETAILED FREQUENCIES

How will you be answering this survey?

	%
As an individual philanthropist with respect to my own values	57
As an individual philanthropist with respect to a family or board of which I am a part	26
As a professional or advisor with respect to a particular singular individual or couple	2
As a professional or advisor with respect to a family or board	13
In another capacity	3

## PHILANTHROPIC ISSUE AREAS

Thinking about your current giving to Jewish causes, what are the issue areas that appeal to you (or your board or family)?

	%
Educating Jewish children and adolescents	70
Supporting identity building initiatives by and for Jewish young adults	40
Innovative Jewish learning initiatives	36
Social justice initiatives	35
Public relations and advocacy on behalf of Israel	34
Strengthening young people's ties to Israel	34
Social services for the aged	31
Social services for children	31
Leadership development	26
Community service, promoting volunteerism	27
Promoting co-existence between Israelis and Palestinians	22
People with special needs	20
Holocaust-related education	18
Advancing Jewish women, gender issues	18
Outreach to inter-married couples	16
Early childhood initiatives	16
Jewish spirituality	16
Arts and culture	16
Environmentalism through a Jewish lens	12
New media with a focus on Jewish identity	8
Jewish media (e.g., JTA, newspapers, magazines)	5

## IDENTITY AS A PHILANTHROPIST

Below are several ways in which people see themselves. When you make philanthropic gifts to Jewish causes, which (if any) of the following characteristics or identity components are important to you (or to your board or family)?

	Not a way I (we, they) see myself	Not important	Somewhat important	Very important
Responsible	2	9	26	63
Fiscally responsible	3	13	21	63
Pro-Israel	4	17	22	58
Inclusive	8	26	29	36
Innovator	6	24	35	35
Solid citizen	11	21	33	35
Entrepreneurial	5	32	31	32
Pluralist	12	30	30	28
Business-oriented	8	32	34	26
Pioneer	10	37	27	26
Seeking reliability	5	29	43	23
Risk-taker	12	38	35	15
Orthodox	36	42	6	15
Socially/politically progressive	21	43	22	14
Activist	14	46	26	14
Feminist	20	51	16	13
Socially/politically liberal	21	44	25	10
Reform	32	53	7	8
Socially/politically conservative	40	47	6	6
Conservative	35	51	11	4
Post-denominational	38	48	10	4
Secular	36	54	6	4

## FEATURES OF GRANTEES

Suppose you were approached by a project in Jewish life for your support. Below are several features that may pertain to this project. For each feature, indicate whether you think you'd find it appealing, unappealing, or it wouldn't matter much to you.

	Appealing	Unappealing	Wouldn't matter
I'm inspired by the leader	91	1	7
It has first-rate fiscal accountability	89	3	8
It is consistent with my strategic approach to grant-making	87	2	11
It's scalable and able to be replicated	79	3	18
It's led by an experienced professional	70	6	25
It's new, but up and running	54	5	41
It gives me a chance to get involved in a hands-on way	46	8	47
The project is well-established	43	10	48
I would exercise some genuine oversight	43	13	44
It's consistent with the values of the organized Jewish community	42	3	55
Seems like a sure thing	42	12	46
It's local in scope, rather than national	38	7	55
It has lots of visibility	36	5	58
It challenges some values of the organized Jewish community	33	15	52
It's led by a passionate amateur	33	27	40
It's a small project	25	10	65
It's national in scope, rather than local	25	14	61
Lots of other people I know support it	23	5	72
It's high-risk, big chance of failure	8	63	29
It has little visibility	7	26	68
Its financial reporting is limited	4	79	17

## PATTERNS OF GIVING, 2008 & 2009

About how much did you (or the foundation, or family) donate to all philanthropic causes in 2008?

	%
Under \$50,000	11
\$50-99,999	16
\$100,000-249,999	25
\$250,000-499,999	15
\$500,000-999,999	10
\$1-2 million	7
\$2-3 million	3
\$3-5 million	3
\$5-9 million	4
\$10+ million	7

As compared with 2008, do you expect that you/your philanthropy in 2009 will...

	%
Decrease significantly	15
Decrease slightly	31
Remain about the same	35
Increase slightly	12
Increase significantly	2
Not sure	4

Of your giving in 2008, about how much would you say was donated to “Jewish causes,” that is ANY cause with ANY relationship to being Jewish or with Israel?

	%
Under \$25,000	6
\$25,000-49,999	10
\$50,000-99,999	18
\$100,000-249,999	26
\$250,000-499,999	13
\$500,000-999,999	7
\$1-2 million	6
\$2-3 million	6
\$3-5 million	3
\$5-9 million	3
\$10+ million	4

As compared with 2008, do you expect that your giving to “Jewish causes” in 2009 will...

	%
Decrease significantly	7
Decrease slightly	22
Remain about the same	52
Increase slightly	12
Increase significantly	4
Not sure	3

## GIVING TO ESTABLISHED INSTITUTIONS

Of the funds donated to Jewish causes, about how much did you donate to the following established institutions of Jewish communal life? Relative to all the amounts given to Jewish causes, would you say it was...nothing (no donation in this category), a modest amount for you or your foundation, a significant amount, or a VERY significant amount?

	No donation	A modest amount	A significant amount	A VERY significant amount
Institutions in Israel or other countries outside North America	15	33	31	22
Jewish Day Schools	33	22	29	17
UJA-Federation (or similar agency in your area)	23	33	27	17
Identity building programs for adolescents (camps, youth groups, trips to Israel)	36	31	19	14
Synagogue, including dues, capital campaigns, other purposes	15	42	34	10
Jewish University programs	38	40	18	5
All other, established, long-standing institutions	16	53	27	4
Jewish museums and other cultural centers	49	39	10	3
Congregationally based Jewish education	71	20	7	3
Jewish Community Centers	48	36	14	2

**GIVING TO ESTABLISHED INSTITUTIONS**

Do you (or the foundation/family) donate funds to any newer initiatives in Jewish life, including startups, projects, and other recently created initiatives outside of long-established agencies?

No      Not sure      Yes

[If yes]

Please name the newer initiatives which received the largest gifts of those in this category (name up to 3, please):

[If yes]

Please indicate in which of the following areas you made donations to newer initiatives in Jewish life.

	%
Jewish study	42
Social justice	39
Arts and culture (including Jewish music)	23
Jewish spirituality	22
Independent minyanim, or emergent spiritual communities	12
Environmentalism	10
New media	10
Social networking	9
Other	42

Of your overall giving, what are the 3 gifts to Jewish or Israeli causes of which you are the proudest?

## DEMOGRAPHIC AND JEWISH BACKGROUND

You are:

Male	59
Female	41

Your age:

	%
Under 25	0
25-34	2
35-44	12
45-54	30
55-64	30
65+	27

Are you Jewish?

	%
Yes, Jewish	99
Yes, Jewish and something else	0
No	1
It's complicated	0

Are you married or living with a partner? Yes: 88%

{If Yes}

Is your spouse or partner Jewish?

	%
Yes, Jewish	96
Yes, Jewish and something else	1
No	4
It's complicated	0

Do you have any children living at home? Yes: 50%

Which of the following types of Jewish educational experiences, if any, did you participate in as a child, teenager, or college student?

	%
Jewish youth group	56
Visited Israel	51
Jewish studies course(s)	41
Overnight Jewish summer camp	40
Hillel or other Jewish activities in college	30
Day school	22

Your current denominational preference, if any:

	%
None	5
Orthodox	25
Conservative	27
Reform	24
Reconstructionist	3
Renewal	1
Post-denominational	2
Secular	4
Other	10

Are you a member of a synagogue, havurah, or minyan? Yes: 91%

Do you attend Shabbat services once a month or more? Yes: 58%

Have you ever been to Israel?

	%
No	3
Once	8
Twice	2
Three or more times	67
Lived there	20

Are most of your close friends Jewish?

	%
Yes	86
No	9
Not sure	4