

The following was presented to the UJC Prioritization Committee in a Conference Call with Lisa Eisen (Charles & Lynn Schusterman Family Foundation), Jeff Solomon (Andrea & Charles Bronfman Philanthropies) participating.

UJC Conference Call

September 11, 2007

The Jim Joseph Foundation is one of the larger private foundations whose philanthropy is limited exclusively to supporting Jewish education of U.S. Jewish children, youth, and young adults.

Officially incorporated in January 2006, the Foundation has already awarded

- \$11.2 million to the Foundation for Jewish Camping;
- \$4.2 million to *birthright*;
- \$2.2 million to BBYO;
- \$2 million to PEJE;
- \$725,000 each to TCI, Brandeis University and the San Francisco Federation.

At its most recent meeting of Directors – of whom there are six – JJF approved grants to conduct an independent assessment of DeLeT as well as to join Schusterman and Cummings Foundations in funding research into the emerging field of Jewish volunteer service.

JJF is an investment-style philanthropist. As such, the Foundation seeks some kind of measurable social return on its major grants. This reflects the Foundation's aspiration that thoughtfully-allocated philanthropic resources will achieve demonstrable results.

The Foundation's charter calls for it to be in existence in perpetuity. JJF takes a long term view of the use of the exceptional largesse of funds that the donor (Jim Joseph, who died in December 2003) generously left the Jewish community.

The accelerated strategic planning process the Foundation completed in about six months in 2006 resulted in it identifying a clearly articulated vision: "an increasing number of young Jews will engage in ongoing Jewish learning and choose to live vibrant Jewish lives."

Strategically, 60% of the Foundation's grants in its initial years will support the education of Jewish teens and young adults, ages 13-23, concentrated in the major metropolitan areas of the cities in which the Directors reside (that is San Francisco, Los Angeles, Washington DC and Boston). Another 40% of the Foundation's assets will be allocated to initiatives that show genuine promise for advancing education of Jews at any age level and in any part of the United States. This grant making for Jewish learning is may include, but is not limited to

1. Grants made in partnership with other funders enabling the Foundation to help realize its vision through leveraging its resources.
2. Grants as investments in research and development that will inform the Foundation's ongoing philanthropic practice and contribute to learning in the field.
3. Grants for seed funding of novel, innovative projects furthering the Foundation's mission.

As I understand it, you have asked Jeff, Lisa and me to address four questions:

1. What are current trends in private Jewish Foundation philanthropy and how do these trends coincide with the thirteen potential priorities defined in the briefing paper UJC provided us?
2. What role(s) can local Federations and/or UJC play in supporting private Foundation-funded initiatives?
3. How can the Federation leverage its resources in working with private Foundations?
4. In a synergistic scenario, what might the Jewish future look like five to ten years from now?

Four of the topics described in the UJC briefing paper are most pertinent to JJF grant making. These four areas are:

- Engaging the next generation
- Jewish education
- Recruitment and Training of Jewish professionals

- Strengthening Jewish identity

Personally, I do not find it useful to analyze Jewish life atomistically. A fundamental challenge for a Foundation of JJF's nature is to articulate a Theory of Change that endeavors to depict the social world in a way that reflects its lived complexities.

At JJF, for example, we operate under the following assumptions, which lead us to a particular style of grant making, itself based on an explicit Theory of Change. Here are seven of our most fundamental assumptions:

- Human beings move through predictable stages of development (documented in scientific literature)
- Educationally, engaging humans at different stages of their development requires varying approaches to teaching and learning that should emanate from the relevant research
- Education in contemporary society can be life long. It occurs in multiple settings, and should not be construed to take place only in schools
- Peer groups are powerful influencers on peer behavior
- The Jewish world presently experiences a shortage of highly qualified, professionally trained educators. Identification, certification, employment and especially retention of educators can be enhanced by systematic approaches to improving each.

- ***Devolved*** community that traditionally is handed down to us in transmission of Judaism's basic teachings and intrinsic values bring us together as *Klal Yisrael*. But in the 21st century in the United States, the two texts of Jewish and American culture have coalesced into a single culture, blurring if not downright obscuring the cultural and religious distinctiveness of Judaism.
- We face the challenge of creating ***involved*** communities which appeal to individuals enough to motivate them to integrate Judaism into their identities. We compete for the attention—and the heart and soul—of the next generation of Jews, who are sovereign selves.

From these assumptions, then, comes the following Theory of Change guiding JJF's philanthropy:

- To the extent caring, competent, qualified educators interact with Jewish peer groups (around substantive and meaningful engagements) the likelihood increases that greater numbers of individuals in these peer groups will be inspired to continue their Jewish journeys.

As for JJF working with Federations (which, not incidentally, we are doing in intentional ways), I want to aver that the five most important Jewish Initiatives during the last decade or so – *birthright*; the establishment of both the Foundation for Jewish Camping and PEJE; the various JFN match programs supported by AVI CHAI,

Sachta Rashi and Weinberg Foundations and PEJE; and Wexner programs of intensive adult learning – have been conceptualized by private philanthropists.

During this same time period of time, UJC and federations have brought to life the PACT and Ethiopian National Project as well as the creation of Naturally Occurring Retirement Communities, disparate but certainly noteworthy achievements.

We have generously supported one another in seeking to secure a more vital Jewish future with these various Initiatives. So while I am not speaking formally for JJJ's Board, I do believe our Directors endorse the new equation that Wexner Foundation CEO Larry Moses postulates: private Jewish philanthropy will not flourish as it might if it fails to find ways to work productively with the organized Jewish philanthropic community. In turn, communal philanthropy ultimately cannot succeed without fostering fruitful relationships with private foundations.

Transparency, accountability, effectiveness, and impact are benchmarks against which major Jewish private philanthropy is measuring itself— which is as it should be. It is in this regard that I propose ten questions as recommended focal points for productive federation/major private foundation work:

1. Is the matter-at-hand of strategic importance to both federations and private philanthropists?

2. Is framing of the issue compelling?
3. Is the Initiative grounded in a carefully crafted theory of change?
4. Is the scope of the proposed Initiative likely to succeed given the scale of the system in which the Initiative is embedded? (Far too often, the size and scope of the grant support recommended is truly trivial compared to resources required.)
5. Can we agree on performance measures as a basis for assessing outcomes?
6. Do we believe we can achieve impact and, if so, over what period of time?
7. Is it our shared practice to commit resources sufficient for adequately assessing major Initiatives both formatively and summatively?
8. Do we know what it will take to sustain the Initiative's success?
9. Will our measures of success carry with them predictive value in order that the Initiative readily lend itself to adaptation by others?
10. What intent do we have to scale this Initiative?

Given these 10 criteria and recognizing Jewish private philanthropy's essential grant making ethos as compared to federations' historic, persistent fundraising characteristics, I would not be sanguine about UJC leveraging major private foundations. That said, local federations can bring private Jewish philanthropists to the

communal table, as is being accomplished in cities such as Baltimore, Boston, and Chicago.

Practically speaking, partnership requires that the parties involved share resources—people, technologies, funding; agree on problem formulation; explicate strategies and then execute tactics deemed essential for successful implementation of the funded initiative in an orchestrated manner; embrace a clearly articulated vision of success as a standard to which partners and the grantee(s) alike will be held accountable; and work at the same pace.

At their best, collaboratives change the rules of the road. They make grantmaking more predictable and supportive of grantees. They harmonize goals, processes and phasing. They offer the chance for a group of funders, to proceed at the same time from an agreed-upon, common platform. This reduces the mystery of grantmaking. It adds regularity and consistency and sometimes a focus on outcomes. It brings funders and grantees into a more engaged, collegial relationship. The parts start to work adaptively, together. (Ed Surdna, *Beyond the Money*, p.26)

Finally, from JJF's self-interested perspective, a synergistic (UJC's terminology) relationship with federations would help the foundation accomplish the following 6 (six) goals, perhaps in a 10 to 15 year period:

- 150,000 Jewish youth attend residential Jewish camps. Three times the number of Jewish teens who currently are in youth groups are actively engaged in Jewish youth organizations
- Incremental growth in Jewish day school enrollment (at a 10 to 15% increase over today's number of students) has occurred
- Retention rates of Jewish educators—day school teachers, Day and Congregational heads of schools, youth group advisors, Bureau educational planners—are improving annually
- An adequate supply of credentialed Jewish educators pursues an array of career opportunities in the Jewish world
- Numerous, diverse portals to Jewish Life—birthright, service, camping, social action, environmentalism, cultural arts, societies of Jewish professionals engaged in Jewish learning and celebration, day schools—are manifestly self-supporting.

There is an undeniable trend in the Jewish world that finds next generations of Jews gravitating toward myriad forms of involved community—one that is not imposed on individuals but chosen. Jewish private philanthropists capitalize on this phenomenon, seeing it as a means to add both richness and possibility to young Jews' understanding not only of their volitional selves but of deeper purposes in life most fruitfully experienced in Jewish communal settings. Perhaps we can find mutually beneficial ways to bring

as many Jews as possible to an open, responsive, indeed enriched
21st century Judaism.