

The Center on Philanthropy & Public Policy

THE TRANSITION OF COMMUNAL VALUES AND BEHAVIOR IN JEWISH PHILANTHROPY

Gary A. Tobin

**Research Paper - 6
January 2000**

THE TRANSITION OF COMMUNAL VALUES AND BEHAVIOR IN JEWISH PHILANTHROPY

Gary A. Tobin

**Research Paper - 6
January 2000**

Gary A. Tobin: President, Institute for Jewish and Community Research; 3198 Fullton Street; San Francisco, CA 94118

ABOUT THE CENTER ON PHILANTHROPY AND PUBLIC POLICY

The Center on Philanthropy and Public Policy promotes more effective philanthropy and strengthens the nonprofit sector through research that informs philanthropic decision making and public policy to advance public problem solving. Using California and the West as a laboratory, the Center conducts research on philanthropy, volunteerism, and the role of the nonprofit sector in America's communities.

In order to make the research a catalyst for understanding and action, the Center encourages communication among the philanthropic, nonprofit, and policy communities. This is accomplished through a series of convenings and conversations around research findings and policy issues to help key decision makers work together more effectively to solve public problems and to identify strategies for action.

The opinions presented in this paper represent those of the authors and not those of The Center on Philanthropy and Public Policy.

Copyright © 2000 by The Center on Philanthropy and Public Policy

The Center on Philanthropy and Public Policy
School of Policy, Planning, and Development
University of Southern California
Lewis Hall, Room 210
Los Angeles, California 90089-0626

All rights reserved

Printed in the United States of America

ABOUT THE AUTHOR

Gary A. Tobin is president of the Institute for Jewish & Community Research and is also director of the Leonard and Madlyn Abramson Program in Jewish Policy Research at the University of Judaism in Los Angeles. He was the director of the Maurice and Marilyn Cohen Center for Modern Jewish Studies at Brandeis University for fourteen years. Prior to joining Brandeis, Dr. Tobin spent eleven years on faculty at Washington University, St. Louis. He has worked extensively in the area of patterns of racial segregation in schools and housing and has been a consultant in planning, demography, and philanthropy with hundreds of non-profits, including federations, synagogues, Jewish community centers, foundations and others. Dr. Tobin is the author of numerous books, articles, and planning reports on a broad range of subjects. He is currently involved in research concerning, philanthropy, racial and ethnic diversity in the Jewish community, and anti-Semitism. Dr. Tobin earned his Ph.D. in City and Regional Planning from the University of California, Berkeley.

THE TRANSITION OF COMMUNAL VALUES AND BEHAVIOR IN JEWISH PHILANTHROPY

Introduction

It is not uncommon for scholars and practitioners alike to discuss the ways that values, history and community structures shape philanthropy in any particular community. Philanthropy reflects community values and norms; what communities as a whole and the subgroups within them think and feel are often revealed through their patterns of giving. It is clear that different groups of Americans weave their own ethnic and cultural norms into the fabric of their philanthropy. Racial, ethnic, and religious groups find philanthropy at the intersection of communal social systems and relationships to the larger society.¹ Jewish philanthropy represents a complex set of interactions within an intricate set of community structures.² Not only do community values, norms, and behaviors shape philanthropy within the Jewish community, but the opposite is true as well: philanthropy within the Jewish community is itself a set of systems, ideologies and behaviors that shape the character of the Jewish community. Philanthropy is not only a reflector, but a determinate and molder of values and norms as well. The philanthropic structure itself is an engine that drives much of the Jewish communal agenda.

How Jews give away money tells a great deal about the evolving character of Jewish life in America. Philanthropy reflects an ethnic/religious group defining its place in American society, while at the same time shaping its own internal direction and self-definition. Philanthropy is the means by which much of the communal agenda is debated and decided. Jewish philanthropy shapes values and norms as well as responds to them. Most Jewish fundraising organizations are not only institutions that raise money, they are also institutions that educate, lead, and define the values of American Jewish society. The purposes for which money is raised define the character

¹Emmett D. Carson. *A Hand Up: Black Philanthropy and Self-Help in America*. Washington, D.C.: Joint Center for Political and Economic Studies, 1993; Sandy M Fernandez. "Hispanics Erase Myths With Money." *New York Times*, Wednesday, 18 November 1998, sec. G, p. 16; Bradford Smith, Sylvia Shue, Jennifer Lisa Vest, and Joseph Villarreal. *Philanthropy in Communities of Color*. Bloomington: Indiana University Press, 1999; Robert Wuthnow, Virginia A. Hodgkinson, and Associates. *Faith and Philanthropy in America*. Washington, D.C.: Independent Sector, 1990; *Philanthropy and the Black Church*, ed. Alicia D. Byrd. Washington, D.C.: Council on Foundations, 1990; William E. McManus. "Stewardship and Almsgiving in the Roman Catholic Tradition," in *Faith and Philanthropy in America*, ed. by Wuthnow, pp. 115-133; William A. Diaz. "Philanthropy and the Case of the Latino Communities in America," in *Philanthropy and the Nonprofit Sector*, ed. by Charles T. Clotfelter & Thomas Ehrlich, Bloomington, Indiana University Press, 1999, pp. 275-292; Lilya Wagner and Ricardo Rodriguez. "Applying and Disseminating the Values of Stewardship and Philanthropy in Hispanic/Latino Institutions and Communities," Indianapolis: Indiana University Center on Philanthropy, 1998.

² It is important to note that the Jewish community itself is hardly a monolith. Although Jews comprise only about 2% of the total population in the United States, this five to six million people constitute a diverse set of subgroups. Different subcultures of Jews exist, e.g. immigrants from the former Soviet Union and Israel. Geography also plays a role, with the Jewish community cultures of New York, South Florida, San Francisco and Los Angeles, for example, being quite different from each other. Jewish communities tend to reflect the characteristics and behaviors of the regions in which they live. Orthodox, Conservative, Reform, and other denominational differentiation within Judaism also constitute different sub-communities, as do various forms of participation in the Jewish community. This paper does not purport to examine all the various nuances that derive from the complex composition of the Jewish community and its diverse sub-populations. Rather this paper looks at the Jewish community as a whole. The philanthropic structure is examined, as it represents the entire Jewish community, recognizing that more detailed analyses of Jewish subgroups would provide a more varied profile.

of the Jewish community. Contributors and non-contributors alike are profoundly influenced by the programs and institutions funded through the Jewish philanthropic structure.

The social science literature discussing patterns of Jewish philanthropy is somewhat limited. Quantitative data on donor attitudes and behavior are still scarce in the Jewish community. Given some of the conventional wisdom about the success of Jewish philanthropy in the United States, one might have anticipated a greater analytical framework. Yet we have little empirical analysis on why Jews give, to which philanthropies, and the relationship of religious identity to philanthropic behavior.³ Some studies look specifically at women's roles in Jewish philanthropy.⁴ No comprehensive study of Jewish philanthropy is available to compare to general American society as reported by the Independent Sector.⁵

We do know that religious identity, whether expressed by ritual observance or participation in communal activities, is highly correlated with giving to Jewish philanthropies. Synagogue attendance, synagogue membership, organizational membership, and visiting Israel were found as the most important variables associated with making a contribution to a Jewish philanthropy and the amount contributed. Indeed, philanthropic behavior itself is one of the variables which constitutes a component of Jewish identity.⁶

We also know that Jews are slightly more likely to make some contribution to a non-Jewish than Jewish philanthropy and that the number of donors to umbrella giving through federations' annual campaigns has been declining.⁷ A number of studies corroborate that there is a growing propensity for Jews to give to secular rather than Jewish causes, especially for younger Jews.⁸ Yet, Jewish philanthropy is thriving, both in the central system of the federation, and outside it, in terms of actual dollars raised or managed. The federation as an institution is thriving as never

³ Jack Wertheimer. "Current Trends in American Jewish Philanthropy." In *American Jewish Year Book 1997: A Record of Events and Trends in American and World Jewish Life*, edited by David Singer and Ruth R. Seldin, Volume 97, 3-92. New York: The American Jewish Committee, 1997; Peter Everett Tarlow. "Who Gives? Who Leads? A Study of A Voluntary Jewish Fundraising Organization," Ph.D. diss., Texas A&M University, 1990; Dorene Lehavi, "A Survey of Evolving Attitudes Regarding Charitable Giving to Federated Organizations in a Jewish Community," Ph.D. diss., University of Southern California, 1995.; Gary Tobin and Mordechai Rimor. "The Relationship Between Jewish Identity and Philanthropy." in *Contemporary Jewish Philanthropy in America*, edited by Barry A. Kosmin and Paul Ritterband. Savage, MD: Rowman & Littlefield Publishers, Inc., 1991, pp. 33-56.

⁴ Steven J. Gold. "Women's Changing Place in Jewish Philanthropy," *Contemporary Jewry*, 18 (1997).

⁵ Independent Sector. *Giving and Volunteering in the United States*, 1999, Executive Summary. (Washington, D.C.: Independent Sector, 1999).

⁶ Gary Tobin and Mordechai Rimor. "Jewish Giving Patterns to Jewish and Non-Jewish Philanthropy," *Faith and Philanthropy in America*, Robert Wuthnow and Virginia A. Hodgkinson and Associates, Editors, pp. 134-164. San Francisco: Jossey-Bass Publishers, 1990.

⁷ Gary Tobin. *Trends in American Jewish Philanthropy: Market Research Analysis*. Maurice & Marilyn Cohen Center for Modern Jewish Studies, Brandeis University, Policy and Planning Paper 8, April 1992; Gary Tobin. "The Future of the UJA-Federation of New York." *Guiding Organizational Change: The New York Federation (1986-1996)*, Michael J. Austin, ed. Maurice & Marilyn Cohen Center for Modern Jewish Studies/Institute for Community and Religion, Brandeis University, New York: UJA Federation. Fall 1996.

⁸ Gary Tobin. *Jewish Philanthropy: Patterns of Giving to Charitable Causes in Greater Philadelphia*. The 1996/97 Jewish Population Study of Greater Philadelphia, Special Report no. 4. New York: Ukeles Associates, 1998; Gary Tobin, "Potential Major Donors of the Greater East Bay." Prepared for the Jewish Federation of the Greater East Bay. San Francisco: Maurice & Marilyn Cohen Center for Modern Jewish Studies/Institute for Community and Religion, Brandeis University, February 1996.

before, even while the annual campaign is flat. In spite of the great success of federations in overall financial resource development, the diminishing role of federations has been speculated about for some time, at least since the beginning of the 1990s. One prominent Jewish journalist queried in a 1992 editorial about whether federations would continue to function at all.⁹ Articles in both the *Forward* and the *Wall Street Journal* in 1998 documented the central funding systems losing ground to more targeted philanthropies in Jewish life.¹⁰ But all revenue streams to federations have been increasing dramatically over the past decade. The concern about the overall health of federations is a misplaced and antiquated emphasis on the annual campaign as the primary measure of success. Unrestricted endowments, restricted endowments, philanthropic funds, special campaigns, and capital campaigns have all grown at a rapid pace. While the percentage of the total revenue stream represented by the annual campaign has been declining, the overall base has been growing. Federations have increased their annual allocations through grant-making far beyond the funds distributed from annual campaigns.¹¹ The growth of this aspect of the federation system is likely to increase at an even greater pace, given the revised estimates of the amount of wealth to be transferred in the near future.¹²

The total dollars raised outside the federation system have also been growing. Organizations such as the New Israel Fund, Jewish National Fund and other organizations have shown major increases in the past ten years. The number of organizations raising money has also burgeoned; therefore, more dollars are being raised through a broader network. The competitive nature of the fundraising system has resulted in more organizations producing more dollars by addressing specific needs and interests, and tapping into targeted subgroups of Jews. Jews are giving more dollars than ever before to Jewish causes, as well as more dollars to secular causes.

The context in which Jewish philanthropy takes place has changed radically in the last few years. The purposes for which funds are raised, the processes of collection and distribution, and the institutional landscape in the Jewish fundraising world are all being altered. Some of the underpinnings — philosophical, ideological and religious — in the Jewish fundraising system remain essentially unaltered, but the nuances of the purposes for which monies are raised have expanded and become more differentiated.

This monograph looks at Jewish communal values and structures as they shape philanthropy. It is not an analysis of religious ideology, Torah text, or an in-depth look at the relationship of Jewish theology and philanthropy. A rich literature exists on *tzedakah* and performing acts of

⁹ Gary Rosenblatt. "Can Federations Survive?" Other Voices Column, *The Jewish Journal*, 16-22 October 1992: 35.

¹⁰ Sara Berman. "UJA Eclipsed by Targeted Gifts to Israel: 'American Friends' Generate a Shift in Charitable Giving" *Forward*. 6 March 1998.; Tamar Hausman. "U.S. Jews Refocus Donations to Israel, Shifting to Nongovernmental Causes," *The Wall Street Journal*, 5 October 1998.

¹¹ Donald Kent and Jack Wertheimer. "A Revolution in Federated Giving," Opinion, *The New York Jewish Week*, 8 October 1999.; Donald Kent and Jack Wertheimer. "The Implications of New Funding Streams for the Federation System." *Journal of Jewish Communal Service: A Quarterly of Professional Trends and Developments*. 76, no. 1/2 (Fall/Winter, 1999): 69-77.

¹² John J., Havens and Paul G. Schervish. "Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy." w & c revised paper taken from website: http://www.bc.edu/bc_org/avp/gsas/swri/m&m.htm, 19 October 1999.

loving-kindness, and the meaning of Jewish laws regarding giving and communal support. But that is not the purpose of this discussion.¹³

The focus is on the current Jewish philanthropic system, which can be viewed through a number of lenses. The first is ideological. Ideology represents the guiding principles, beliefs and myths that define the philanthropic system. The second lens is structural. This is an institutional and organizational network, the mechanisms through which ideologies are expressed. Over the years American Jewry, as well as other Diaspora communities, have created elaborate and intricate systems to help raise money to build the State of Israel. The third lens is programmatic. These are the specific activities within the system that are supported through monies raised or the activities that help raise the money. Sometimes they are the same, with fundraising organizations having adopted programs that both raise money and build the system itself. The fourth lens is technical, the set of tools that are used to help raise funds. These tools may include marketing techniques, the use of media, and so on. The level of sophistication of these tools varies tremendously depending on the fundraising organization. The fifth lens to examine the fundraising system is procedural, the processes in decision-making, resource distribution, and so on that connect ideologies, structure and programs into a system. The focus of this paper is on the ideological, with some discussion of the structural.

The Americanization of Jewish Philanthropy

The Americanization of Jewish philanthropy has taken place. Jews are now so integrated into the American mainstream, that *tzedakah* has taken on more of the character of American philanthropy, and will continue to do so, representing less the religious tradition of Jews and more the civil tradition of philanthropy in the United States. Philanthropy among Jews mirrors certain aspects of the American system, especially among the very wealthy. Issues of power, gender, generation, and the roles of professionals all come into play.¹⁴ More Jews will make contributions based in American values of giving; voluntary associations, giving through personal choice, and supporting a wide variety of causes. They, like other Americans, will pick and choose that which they want to support, most often philanthropies for which they have some affinity or connection. One model of giving looks at variables of involvement, appeal of large projects, and other factors. These, among other models, explore why particular individuals give

¹³ Data from this analysis come from three primary sources. First, quantitative data are available from a variety of community studies completed in individual Jewish communities, usually sponsored by the local Jewish federation. These studies engage scholars to provide overall demographic religious identity and communal behavior data. Three to four studies of this kind are usually completed each year. Second, qualitative research about donor attitudes and behavior are also sponsored by Federations and other Jewish organizations. These studies provide a more in-depth look at Jewish philanthropy through the eyes of donors. The emphasis in this paper is on the attitudes and behaviors of major donors who set the standards and drive much of the Jewish philanthropic agenda. The third data source is qualitative data gathered through participant observation by the author of this paper who serves as a planning and research consultant to a number of Jewish organizations, foundations, and private philanthropists. Serving in this capacity provides the opportunity to participate in planning and implementation within the Jewish philanthropic structure.

¹⁴ Teresa Odendahl. *Charity Begins At Home: Generosity and Self-Interest Among the Philanthropic Elite*. New York: Basic Books, 1990; Sondra C Shaw, and Martha A. Taylor. *Reinventing Fundraising: Realizing the Potential of Women's Philanthropy*. San Francisco: Jossey Bass Publishers, 1995.

and others do not, within any construct, Jewish, American, ethnic, or otherwise.¹⁵ Over time, it will become even more difficult to discern what is different or distinctive about Jewish philanthropy from American philanthropy. Non-sectarian institutions will continue to garner time, attention, and philanthropic dollars. Jews may now have a natural affinity and loyalty to a whole new set of institutions and organizations — the ones that affect their lives, their children’s lives, their parent’s lives.

Three trends in American philanthropy are paralleled within Jewish philanthropy. First, umbrella giving is diminishing. Just as United Way represents a decreasing presence, so do federations’ annual campaigns play a decreasing role in overall Jewish philanthropy. The annual campaign of federations is still a major engine in Jewish philanthropy, but probably accounts for no more than 10% – 15% of all funds raised by Jews for Jewish causes (including synagogue dues and contributions). The annual campaign is likely to continue its decline as the central force in American Jewish philanthropy.

Parallel Trends in American & Jewish Philanthropy
<ol style="list-style-type: none"> 1. Decline of umbrella campaigns 2. Rapid growth of foundations 3. Accumulation of wealth

Second, the rapid growth of private foundations, both in terms of numbers and assets, continues unabated. More dollars are being deposited, but the pace of the distribution is slow. Most Jewish foundations, like the foundation world as a whole, see the 5% distribution requirement as a ceiling not a floor. Therefore, more and more money is accumulating, but not necessarily utilized in the present for Jewish community-building purposes.

Third, there is an enormous accumulation of wealth, both from a healthy economy, and a stock market boom. Donors and foundations have more money to give away. Like the Jewish community, other ethnic and religious groups also are suddenly seeing increased contributions to their philanthropic structures.¹⁶ With wealth comes more involvement in philanthropy. As one study in 1997 demonstrated, those who accumulated wealth were very likely to begin serious involvement in philanthropy, with the highest percentage choosing at least some kind of contribution to their religious community.¹⁷

The Americanization of Jewish giving has also included a growing propensity to give to philanthropies outside of the Jewish community. American Jews have become an integral part of the philanthropic mainstream, donating large sums to a variety of institutions and organizations in the realms of education, health, human services, culture, politics, and others. Donors have become involved more deeply in non-Jewish philanthropy for five reasons.

¹⁵ Joan Mount. “Why Donors Give.” *Nonprofit Management & Leadership*, 7, no. 6 (Fall 1996): 3-14.

¹⁶ Diana Campoamor, William A. Díaz, and Henry A. J. Ramos, eds. *Nuevos Senderos: Reflections on Hispanics and Philanthropy*. Houston: Arte Público Press, University of Houston, 1999.

¹⁷ Clayton-Davis & Associates, Inc. “Religious Causes Draw Most Interest Among Charitable Contributors, Study Shows.” From “Affluents Profile Study” conducted for Mercantile Trust. December 1997.

The first is acceptance and integration into American society, the removal of antisemitic barriers. Jews play prominent roles in institutions from which they were once prohibited from taking leadership roles due to antisemitic restrictions. Involvement in the general society's philanthropy signals both group and individual triumph to blend into the American mainstream.

Second, serving the non-Jewish community is seen by many as a mission of their Jewishness. The possibilities for giving as an expression of Jewish life are extended even further by broadening the definition of what is Jewish. Some individuals believe that they are performing an explicitly Jewish act by contributing to a secular shelter for the homeless or even an emergency food program for the hungry under Christian auspices. Even though the recipients are non-Jewish, both institution and clients, the act of performing mitzvot with Jewish sensibilities can make practically any giving opportunity a Jewish one to some donors. This philosophy extends the opportunities for giving from the myriad of Jewish institutions and causes to a decision-making matrix which, for all practical purposes, is infinite. Philanthropy is also a means to reduce the conflict between being Jewish and being a "middle-class," that is, ordinary American.¹⁸

Third, many donors believe that they must contribute to societal institutions outside the Jewish community because the donor desires to "put something back into the community." Many feel that America generally, or their local community specifically, have been very good to them. Many Jews feel that they have been given incredible opportunities to be full-functioning and accepted members in an open society. They believe that since the country has been so good to them, and the society so open, that there is a quid pro quo for Jews to support general institutions as well as Jewish institutions. Therefore, they express their gratitude to the nation and to the community through philanthropy. Philanthropy becomes a "thank you" to America, a statement of personal gratitude in addition to a religious act or ideology.

Reasons for Americanization of Jewish Philanthropy
1. Acceptance and integration into American society
2. Fulfilling Jewish mission of serving larger society
3. Giving something back as Americans
4. Being ambassadors of the Jewish community
5. Secular concerns are more compelling

A fourth factor is the desire to represent the Jewish community, to be ambassadors of the Jewish people, and to secure good will for Jewish causes. Some donors do not want non-Jews to assume that Jews support only Jewish causes, that Jews are too insulated or self-concerned. Some feel that if Jews are too isolated and provincial, the hospitable atmosphere of the general society will

¹⁸ Evan M Adelson. "The Dirty Business of Charity: Raising Money, Reproducing Stratification, and Constructing the Jewish Community." American Sociological Association Paper, 1995.

not respond to Jewish needs. By giving to a wide variety of general causes, some donors feel that they will ensure general community support for Jewish concerns.

Indeed, there is some anecdotal evidence that Jewish philanthropists are more likely to make their largest gifts to non-Jewish philanthropies.¹⁹ Gifts of \$40 million, \$50 million, \$100 million, or even more from Jews are not uncommon to non-Jewish philanthropies. These gifts are not necessarily paid out in a one-year period, but may be paid over a five or ten year period or longer. Nevertheless, non-Jewish causes are attracting the largest Jewish donor gifts. Individual Jewish philanthropists make annual gifts of substantial amounts to Jewish philanthropies, but it is less common to see mega-gifts given to the Jewish community. Universities, symphonies, hospitals, and museums are capturing the largest gifts from Jewish donors.

Fifth, non-Jewish causes seem more compelling. Most individuals interviewed in a variety of studies indicated that they could give two or three times more to Jewish philanthropies if they felt the need. Most of them do not feel the need.²⁰ As a result, a high proportion of their giving now goes to non-Jewish philanthropies. The proportion of giving to Jewish philanthropies has declined precipitously for many major donors, down from 70% for many to 30% or less. Many also feel that there is no Jewish institution or organization that they know of that could efficiently or appropriately utilize a gift of \$80 or \$100 million. Familiarity breeds some contempt on the one hand, and disengagement breeds suspicion on the other hand. Some would argue that among wealthy Americans, the level of giving in general is not what it ought to be.²¹

One could hypothesize that in a fixed pool of philanthropic dollars, Jewish philanthropies are competing for contributions with non-Jewish philanthropies. Or one could argue that the pool of philanthropic dollars *expands* depending on both motivating factors and agencies involved. The latter illustrates that philanthropists give to a wide variety of causes, both Jewish and non-Jewish, and the amount given is not necessarily dependent on the decision to give to a Jewish versus non-Jewish cause. If the donation pool, that is, the amount given, is somewhat fixed, then Jewish philanthropies have serious competition from non-Jewish philanthropies. If the pool expands, depending on the case made and the motivation that is provided, the amounts given tend to reinforce one another rather than be competitive.

Basic Values in Jewish Philanthropy and Community

Jewish philanthropy is anchored in three pervasive values. The first is *tzedakah* — the ancient religious imperative to provide for those in need. *Tzedakah* — literally righteousness — is a deeply embedded set of religious obligations that Jews have for one another and all human beings. A variety of scholarly and popular works attest to this relationship of *tzedakah* and social

¹⁹Op. cit. Gary Tobin. “Potential Major Donors of the Greater East Bay.”

²⁰Op. cit. Gary Tobin. “The Future of the UJA-Federation of New York.”

²¹ Claude Rosenberg, Jr. *Wealthy and Wise: How You and America Can Get the Most Out of Your Giving*. Boston: Little, Brown and Company, 1994.

justice in the contemporary American Jewish community.²² The set of ideologies and behaviors that constitute *tzedakah* resembles other faith traditions of charity; concepts of sharing both energy and material goods with those who are less fortunate. Also like other Americans, the impulse for philanthropy is deeply ingrained as an emotional and psychological desire to help others.²³ What distinguishes *tzedakah* is the absolute sense of obligation, its matter-of-factness. It is a must, not a should. It is a command, not a consideration. It is not a matter of choice. An individual is not considered generous because one shares that which they have, because one is supposed to do so. *Tzedakah* is deeply embedded in Jewish thought and feeling, especially the imperative to provide for basic human needs, such as food, shelter, and children in need. These concerns are the foundation for the intricate set of social and human services Jews build for their communities.

Tzedakah is also dedicated to serving the world-at-large, non-Jews as well as Jews. The need to “repair a broken world” (*Tikun Olam*), is deeply embedded in community values and norms. A strong universalistic component characterizes Jewish philanthropy. The interest in social justice and volunteering evolves constantly. It continues to take new forms, such as the Jewish Service Corps, which is designed to serve the secular rather than the Jewish world.²⁴

Basic Values in Jewish Philanthropy
<ol style="list-style-type: none"> 1. <i>Tzedakah</i> (Righteousness) 2. Reinforcement of ethnic, cultural and religious identity 3. Self protection from external threats

The command of righteousness through philanthropic obligation was codified within a set of societal laws that wove a system of communal order. How one was to perform righteous acts was laid out in an elaborate set of instructions — first in the written law (*Torah*), and then in the oral law (*Talmud*) of the Jewish people. These acts of giving became interwoven into the basic foundation of Jewish society. Religious and civic systems were fused: religious acts and civic actions were one and the same. Philanthropy, as Jewish Americans understand it, is not part of a “voluntary sector” that is separate from governance or civil law, but fully melded into an overall communal structure. Some consider philanthropy the civil side of Jewish life, and synagogue attendance or ritual observance the religious side, when both are actually religious in nature.²⁵

²² Lawrence Bush and Jeffrey Dekro. *Jews, Money and Social Responsibility: Developing a “Torah of Money” for Contemporary Life*. A Guidebook with Supplementary Essays by Letty Cottin Pogrebin and Arthur Waskow, with a Forward by Jonathan Schorsch. Philadelphia: The Shefa Fund, 1993.

²³ Robert Wuthnow. *Acts of Compassion: Caring for Others and Helping Ourselves*. Princeton, NJ: Princeton University Press, 1991.

²⁴ “Rabbi Nurtures Young Jews’ Quest for Faith and Service.” Special Report, Religion Section, *Chronicle of Philanthropy*, 14 January 1999.

²⁵ Jonathan Woocher. *Sacred Survival: The Civil Religion of American Jews*. Bloomington, IN: Indiana University Press, 1987.

As the religious/social societies of Judaism were transplanted and maintained in a multitude of Diaspora communities, Jews brought their philanthropic systems wherever they went.²⁶ Thus the systems of philanthropy became more and more institutionalized over time. In place after place, century after century, this religious/social structure was replicated. Jews maintained separate or quasi-separate societies, with human and social service systems. Long before the “public sector” took responsibility, Jews took care of other Jews. They became proficient in designing, building, and maintaining service systems. They would bring this accumulated knowledge and practice to America. The synergy between Jewish philanthropy and the American system would make both systems flourish even more.

Tzedakah and the philanthropic systems that derive from the religious values of providing for basic human and social needs have been part of the construct of Jewish life for so long that the vast majority of Jews that participate have little knowledge or understanding of the religious origins of their actions. Over time, these religious values have been translated into communal norms, even in the absence of individual or institutional knowledge or recognition of the religious origins of the beliefs and behaviors. These feelings and actions are now “hard-wired” into the Jewish subconscious and communal psyche, guiding and directing Jewish behavior.

Second, Jewish philanthropy is used to reinforce ethnic, cultural and religious identity. Philanthropy expresses and reinforces the desire to maintain separate identity and community. Elaborate systems are developed to support Jewish education and for perpetuating religious life. Not only is it a righteous act to feed a hungry person, it is also a righteous act to educate a poor Jew or logically extended, to help subsidize the religious participation of any Jew who can not afford it. The philanthropic system has a large component dedicated to creating successive generations who identify and act as Jews. Like other religious groups in America, where the church is the primary recipient of much philanthropic activity, Jews make hundreds of thousands of small gifts to synagogues. However, baby boomers and younger are less likely to give to a church.²⁷ The day-to-day support of synagogues through membership dues and other contributions is so ordinary, regular, and uneventful that it is usually not considered much in discussions of American Jewish philanthropy.²⁸

The community-building agenda includes advocacy for Jewish education and supporting synagogues as primary focal points. These areas of philanthropic investment are receiving more attention. It is not clear what the outcomes will be. The issue of building Jewish identity may arouse intense emotions, but does not necessarily offer a clear rallying point, ideology or programmatic agenda for fundraising or institution-building. Some philanthropists may pick specific programmatic agendas such as sending students to Israel or expanding summer camps to build Jewish community. But for the most part, the community-building agenda does not lend itself easily to quick fixes. This fact can lead to frustration or cynicism, because problems that do not have quick fixes seem to have no fixes at all. If clear-cut and easy to implement remedies are not available, then some believe that there is no remedy to be had.

²⁶ Howard Sachar. *A History of the Jews in America*. New York: Random House, 1993; Paul Johnson. *A History of the Jews*. New York: HarperPerennial, 1988.

²⁷ Holly Hall. “The Lost Generation?” *The Chronicle of Philanthropy*, 11;11, 25 March 1999: 25-26

²⁸ Most Jewish households do not have a current membership in a synagogue. Yet, most belong on and off during their lifetimes, and attend synagogue on the High Holy Days of Rosh Hashanah and Yom Kippur.

Third, philanthropy is used for self-protection from external threats. The persistence of antisemitism throughout Jewish history required funds for defense systems and rescue efforts. Defense has evolved into political lobbying, legislative campaigns, and developing political coalitions with other interest groups. A number of organizations such as the Anti-Defamation League, American Jewish Committee, and the American Jewish Congress were created to fight antisemitism.²⁹ Rescue includes efforts to raise money to help bring Jews out of the former Soviet Union where they are threatened by antisemitic violence, or from Ethiopia where they are subject to both discrimination and extreme poverty. Jews in America also developed an elaborate system of rescue organizations, community relations organizations, lobbying organizations, and institutions to support Israel. Support for Israel is linked to the need for self-protection. Israel is seen by world Jews as the ultimate expression of religious destiny, pride, and self-protection for Jews. It is considered a safe haven from discrimination and violence in a hostile world.

Jewish society was constructed to carry out the religious imperatives. These patterns were reinforced by Jews living in isolated subcultures; more often than not, persecuted and denied most basic economic, social and individual rights. Expressions of righteousness also became defense mechanisms; Jews taking care of their own as a necessity in the face of external hostility. Therefore, philanthropy and the social and institutional structures created by it were a communal expression of survival. If Jews did not care of their own, they would perish in a hostile world. The very fabric of Jewish society linked giving and survival in Jewish consciousness and behavior. Raising money has never been about raising money alone. It has always included serving God, helping fellow Jews, and fending off aggression and discrimination.

Because Jews have been forced to be reactive to hostile external forces, a crisis mentality almost always pervaded Jewish philanthropy. The crises can be characterized in the following ways. If Jews did not feed one another, they would starve. If Jews did not help build Israel, then all Jews, everywhere, all the time, would be at risk in potentially hostile countries throughout the world. If Jews did not help support Israel financially, Arab armies would have crushed the young state. If Jews did not help subsidize Jews to leave the former Soviet Union, they could be subject to violent antisemitism. The Jews of Ethiopia would starve. If Jews do not support their synagogues and education programs for Jewish youth, the Jewish community would eventually disintegrate. Conditioned by external and internal threats, Jewish philanthropy has intertwined danger, fear and despair as an underlying emotional basis.

The dominant themes in philanthropy in the last two generations have been linked to peril and destruction from external forces. The United Jewish Appeal's Operation Exodus in the late 1980s and early 1990s was the culmination of decades of effort to facilitate migration (to Israel and the United States) of Jews from the Soviet Union.³⁰ Many Jews felt that this population was in peril and those that remain in the former Soviet Union remain in peril. The campaign

²⁹ Gary Tobin with Sharon L. Sassler. *Jewish Perceptions of Antisemitism*. Plenum Press, New York, NY, 1988.; and Elizar, Daniel Judah. *Community and Polity: The Organizational Dynamics of American Jewry*. Philadelphia: Jewish Publication Society, 1995.

³⁰ Op. cit. Gary Tobin. *Trends in American Jewish Philanthropy: Market Research Analysis*.

rightfully emphasized the threat of antisemitism and repression in the Soviet Union and the latent danger continuing into the 1990s. Rescue was the motif of the campaign. Indeed, fear has been at the heart of the great themes of Jewish consciousness in the twentieth century: *failure* to prevent disaster (the Holocaust), vigilant *battle* against hostile neighbors (Israel), and *avoidance* of disaster, rescuing Jews from potential repression (Soviet Union).

The communal tension between these basic values is constant and intense. How does the community fulfill the need for human services in the Jewish community and the need to serve all of the world? How do Jews balance the need to build religious identity, and the need for defense and rescue? These tensions are being played out now with increasing ferocity, since the Jewish community is in such dramatic transition.

Most Jews do not wish to embrace a system that forces them to choose between building Jewish community in the United States versus social welfare needs in Israel, versus rescuing Jews from the former Soviet Union, or feeding an elderly Jew in Eastern Europe versus sending a Jewish child to a Jewish-sponsored preschool in the United States. Ultimately, asking Jews to choose between communities, between causes, between purposes, creates untenable choices.

For many donors, programs in building Jewish community, even if they are vitally important, are less of a priority than social welfare programs in the Jewish community. Basic human needs come first. Donors must be convinced that those in need — the elderly, the homeless, the hungry, the émigré in need of job retraining — will be adequately served before they will consider reallocating dollars to Jewish continuity. Yet, some donors believe just the opposite, that Jewish community-building comes first and that the social welfare system of the general society can take care of Jews in need. Others simply do not believe that there are Jews in need.

The expression of these values have produced major philanthropic successes in the Jewish community over the past century. These have been the building of synagogues, Jewish community centers, religious schools and other institutions to build religious and ethnic identity, the building of a human service delivery system to serve the Jewish community, the building of the State of Israel, and the resettlement of Jews at risk, including from Arab countries, Ethiopia, and the former Soviet Union. These values are now in a major transition.

Community and Ideology in Transition

Today, however, Jews can begin thinking about who and what they want to be. This emerging reality is at the heart of the current transition in Jewish philanthropy. The transition of Jewish life finds three concurrent themes intertwined in the philanthropic system. First, Jews have become highly integrated into mainstream American society. As one author has noted, sometime in the last two generations, Jews became “white folks” in America.³¹ Second, Jews remain different, in spite of this integration. Jewish psyche and behavior remains distinct from the overall society. Jews still practice a different religion from Christianity, connect to Israel more closely, and still

³¹ Karen Brodtkin. *How Jews Became White Folks & What That Says About Race in America*. New Brunswick, NJ: Rutgers University Press, 1998.

largely marry other Jews (although diminishing all the time).³² Third, Jews have not completely shed their survival fears. Discrimination and violence have been too frequent and too recent for fear to dissipate within a generation. There has been a shift from a focus on external threats (antisemitism) to internal threats (loss of separate identity). Being communally and socially secure and still being afraid causes major dislocation in the philanthropic system.

Even as Jews have become more successful socially, economically, politically and culturally, the crisis mentality remains a *raison d'être* to raise funds. This has been reinforced by the consistent threats to Israeli survival in the Middle East and the mass movement of Jews from the former Soviet Union in what continues to be viewed by Jews as an antisemitic environment and potentially threatening to the safety of the Jewish communities that remain. Therefore, the themes of rescue and survival, while not necessarily salient for raising funds for domestic purposes, have remained a key motivator for fundraising, and still permeate Jewish thought and emotion. How Jews make the transition from the crisis mentality and the fear of group survival will be difficult. Indeed, shifted fundraising themes away from crises from external threats to crises from internal threats is the mirror image of a similar ideology. Group survival remains the essence of the philanthropic system.

The conundrum of Jewish philanthropy rests in being both successful and afraid. Integration into American society draws Jews to non-Jewish philanthropy. At the same time, acceptance into the secular society transforms the distinctive cohesiveness of Jews and therefore, requires more communal attention and funding. The very success of American Jewry necessitates more rather than less funding for the Jewish communal infrastructure. Yet Jews are more drawn to the causes and institutions of the secular society.

Because *tzedakah* is not limited only to Jews, the more success and prosperity Jews achieve, the greater their ability to support group needs throughout American society, and the rest of the world. The enormous economic and political success of the American Jewish community means that they have much more to give. At the same time, the integration of Jews into the general society — schools, business, politics, and cultural life — makes them integral players in the secular world. However, the more successful Jews become, and the more obligated they feel to support secular institutions, the more they also feel the threat of internal dissolution. Therefore, the need for self-help and maintenance of a separate communal order — one that enriches a distinctive and separate Jewish identity — by definition also requires an ever growing need for financial resources. Jews are only able to give away more to the general society because they are so much a part of it. Jews would not be able to give to the general society at such great levels if they were not so successful, and the Jewish community would not need financial support as much if Jews were not so successful. This tension will continue to play itself out in Jewish philanthropy until it is better understood, addressed openly and honestly, and somehow the Jewish community is able to come to grips with the great philanthropic “Catch-22.”

But concern about maintaining a separate identity may not engender as much passion or financial support as past crises, because many Jews may not see weakening Jewish identity as a crisis at

³² Council of Jewish Federations. *1990 National Jewish Population Study*. New York: Council of Jewish Federations, 1992.

all. Jews want to be both assimilated as well as separate. They like being Jewish and American, and they like contributing to both Jewish and secular causes. Few Jews want to segregate themselves completely from American society, except for some ultra-Orthodox groups. It is difficult to sustain a sense of crisis when the vast majority of Jews do not want to live in entirely Jewish neighborhoods or go to entirely Jewish schools. Although afraid of group dissolution, the assimilation emergency is hard to market to the vast majority of American Jews: they like their lives way too much to think about isolating themselves again. The positive effects of Jewish education, religious meaning, and community cohesiveness may be far more appealing psychologically, and therefore philanthropically, than emphasizing the imminent demise of American Jewry. But these positive messages are rarely transmitted.³³

The clarity about supporting human services in the Jewish community has also been seriously damaged. The self-help imperative is very murky because Jewish human service organizations, like other non-profits in America, have become increasingly intertwined with federal and state programs. It has been accepted for some time that foundations and private philanthropy must take up some of the slack from the public sector withdrawal from certain human service programs, but are not certain about which components and how much.³⁴ Jewish homes for the aged, vocational services, family and children services receive most of their money from the public sector rather than private contributions from the Jewish community. Like other groups, the imperative to take care of one's own in the Jewish community involves being part of the American human service mainstream and garnering a share of public sector dollars. While Jews continue to be concerned about the human service needs of their own community, it is unclear how much support needs to be generated through the private system of Jewish philanthropy, and how much should or will come through the general society. Much of the maintenance of the human service system comes from the public sector, while emergency needs, special campaigns, and capital needs come through the Jewish philanthropic system.

The Jewish community is confused about who is responsible for what; is it the federal government, the state government, charities as a whole, or the Jewish community specifically? Jews are still committed to the basic tenets of maintaining a human service infrastructure, but they are much more unclear about the mechanisms to provide this goal. Should Jews support political candidates and programs that provide more of these services through the public sector? Or do they reassume the support burden? Are Social Security, Medicare, and Medicaid enough to meet the health needs of the Jewish elderly? Or should Jewish organizations be providing more comprehensive services, and if so what kind?³⁵

The confusion about public versus voluntary sector roles and how much human service support is necessary and in what realms, may hamper the ability to raise money for human services. Questions often emerge from prospective contributors about the necessity of their contribution in

³³Examining direct mail from many Jewish organizations, they continue to refer to the Holocaust, antisemitism, and threats from intermarriage.

³⁴ National Committee for Responsive Philanthropy. *Community Foundations and the Disenfranchised: A Report on Ten Top Community Foundations' Responsiveness to Low Income and Other Historically Disenfranchised Groups In American Society*. Washington, D.C.: National Committee For Responsive Philanthropy, 1994.

³⁵ Leslie Lenkowsky. "Philanthropy and the welfare state: rethinking the partnership." *Philanthropy* 9 (Summer 1995): 5-7, 26-8.

the light of government support and subsidies. Few people seem to be sure about how much is being done by whom and, therefore, what the individual and collective responsibility in the Jewish community ought to be to meet human service needs. Economic good times, the relative invisibility of the needy, and the gradual raising of the standards of basic needs, all lead to a hesitancy and uncertainty in supporting the human service agenda through Jewish philanthropy.

The Purposes of Jewish Philanthropy

It would seem that the purposes of philanthropy in the Jewish community would be straightforward and simple: To provide financial resources for various purposes, causes, and institutions within the Jewish community. But this view of Jewish philanthropy is too simplistic. The system of Jewish philanthropy is much more complex in its purposes than the provision of financial resources alone. A variety of techniques, both standard and innovative, for existing institutions and new ones, for large scale and small scale efforts, centers the mission on raising the most dollars. But philanthropy in the Jewish community is far more than raising funds. It serves another set of other functions that both define and reflect Jewish communal values and beliefs.

Philanthropy as Community-Building

Giving money to Jewish causes, institutions and organizations is a mechanism to define group membership. One of the standard definitions of affiliation with Jewish community includes giving to Jewish philanthropies. Beliefs and behaviors define whether or not one is a Jew. Along with belonging to a synagogue, observing certain rituals such as participation in a Passover Seder or attending religious services on Rosh Hashanah and Yom Kippur, donating or not donating to Jewish purposes is used as a key benchmark for defining affiliation. Therefore, increasing the number of donors to Jewish philanthropies is seen as a way of identifying, defining and building the Jewish community. The value of contributing goes far beyond the dollars themselves. Most community leaders believe that making some contribution to a Jewish philanthropy constitutes a major statement about one's identity as a Jew. Conversely, contributing nothing to Jewish philanthropies is taken as a statement of disengagement, disinterest or disenfranchisement. Communal leaders look not only at the amount of money being raised, but the proportion of the population that contributes. Broadening as well as deepening the base is valued not only as a fundraising strategy, that is, more donors will eventually lead to bigger contributions from those donors, but as a value in itself. Even if there were hundreds of thousands of additional donors who gave only a dollar and never gave substantially more, this would still be viewed as communally positive. Someone who makes no contribution to the Jewish community is viewed as an outsider — a loss to the tribe. So strong is the emphasis on the contributing obligation as a measure of Jewish communal involvement, that a deep sense of loss accompanies discussions of the declining donor base to Jewish causes.

However, the primacy of raising money usually triumphs over the communal value of involving more donors in Jewish philanthropy. Like most fundraising, most Jewish philanthropy focuses on major donors and larger gifts. Expending resources to expand the donor base is often seen as inefficient as a fundraising strategy when so much more can be added to the bottom line by

concentrating on major gifts. Therefore, a sense of loss may pervade the declining donor base in Jewish philanthropy, but relatively little investment is made to address the issue. Philanthropy for the Jewish masses is viewed as an essential part of Jewish identity and behavior, but for the most part goes unattended in philanthropic planning and execution.³⁶

Purposes of Jewish Philanthropy
1. Community-building
2. Teaching activity
3. Volunteer development
4. Leadership development
5. Expression of personal identity
6. Value definition
7. Building bridges between groups of Jews
8. Building bridges to other Americans

Philanthropy as a Teaching Activity

Jewish philanthropy may be viewed by many as a way to teach Jewish values. Personal solicitations, telephone requests, direct mail, and fundraising events can be mechanisms to inform the Jewish public about issues in Jewish life, religious teachings, and communal values. The teaching goal of Jewish philanthropy is usually implicit rather than explicit for most of those involved. Jewish history lessons are vaguely woven into fundraising efforts and appeals are sometimes laced with the meaning of Judaism, communal goals and cultural values. Given the relatively low rates of affiliation with religious institutions and the waning participation of many Jews in traditional ritual or communal activity, fundraising can be a key mechanism to teach Jews about Judaism. The value, therefore, is not only in how much money is raised, but how much both individuals and groups of Jews learn about being Jewish. Little assessment has been made about the effectiveness of this teaching role, but would make for an important secondary analysis about Jewish philanthropy.

³⁶The need for expanding donor lists was documented in [Gary Tobin, *Donor Acquisition*, prepared for The United Jewish Appeal, November 1994.] These recommendations have been largely unrealized.

Philanthropy as a Volunteer Development Tool

Fundraising is a means to engage volunteers. According to the latest Independent Sector study, 16% of Americans who volunteer do so through fundraising. Raising money is an expression of community involvement within the American culture.³⁷ Donors look for meaningful ways to express their support for a particular organization or institution. Fundraising allows for a multiplicity of tasks and talents that includes organizing events, solicitations, “back room” support services and many others. Philanthropy provides avenues for engagement, team-building, and an outlet for those who want to be part of the Jewish community and are looking ways to express their Jewish identity. Furthermore, philanthropy is goal-oriented with clear benchmarks of success and accomplishments. Therefore, people feel positive about their Jewish identity when they reach their fundraising goals. The philanthropic structures are especially important for Jews who do not consider themselves to be “religious.” Significant proportions of Jews bifurcate their identity between their ethnic/cultural definitions of Judaism and what are more standard definitions of religiosity, including synagogue attendance, or ritual observance such as keeping kosher. Participation in philanthropy is traditionally a system of expression of Jewish values and communal connection for those who may feel marginalized or alienated from what they call the religious side of Judaism.³⁸ Even for those ethnic and cultural Jews who are now seeking more spiritual connections to Jewish life, philanthropy still offers an excellent vehicle for volunteer participation. As noted, traditional values, history and other elements of Jewish learning are incorporated into the philanthropic enterprise. While in the past, Jews who engaged in philanthropy may have engaged in a deeply religious set of activities, they may have done so without having any knowledge based in Jewish learning. Philanthropic activism and learning are becoming more integrated.

Jewish Philanthropy as Leadership Development

While recruiting volunteers in general is a key goal of the philanthropic structure, recruiting leaders is even more desired. Individuals are valued not only for their dollar contribution, but their willingness to take committee, board, task force, and other leadership roles in the voluntary structure of the organization. Very often, major donor status and leadership status are defined as one and the same, with little attention to leadership training efforts for the largest contributors. Those who give the most money become presidents and chairs of boards within a vast array of Jewish organizations, particularly those devoted to raising money. Philanthropy is viewed as a training ground where individuals learn about the purpose and structure of an organization, become vested in it and contribute more money and more time. But, leadership is defined by position, not actual knowledge or skill in leading the organization. Philanthropic leaders also serve the role as ambassadors for the organization to other institutions in both the private and public sectors.

³⁷ Op. cit. Independent Sector. *Giving and Volunteering in the United States, 1999*

³⁸ Op. cit. Jonathan Woocher. *Sacred Survival: The Civil Religion of American Jews*

Philanthropy as Personal Identity and Expression

Jewish philanthropy can be a powerful mode of expression of one's personal identity. For some, it may be the secondary or even primary identity, superseding even profession or family. Individuals have the opportunity to assume multiple identities, including philanthropist or grant-maker. Coupled with the pervasive role philanthropy plays in Jewish society, being identified as a philanthropist represents a positive individual identity in the community. Philanthropy offers a legitimate and valued way to express personal values and commitment to being a Jew.

Fundraising as a Value Definition Activity

The fundraising system helps define values and set priorities for the community. This process is both passive and active. The passive process is the cumulative result of thousands of individual decisions within the Jewish philanthropic structure from individual donors small and large alike. What people choose to give to is interpreted as statements about what the Jewish community should be doing, where it should be heading, what it stands for, and so on. Like some collective hidden hand, what individual donors fund defines the direction of the community and sets policy. A more active process, however, includes setting priorities, developing strategic plans, defining mission statements, and making conscious choices about allocations for the funds that are raised. Value definition and clarification occurs as groups of Jews decide whether or not to fund a particular program or institution; make strategic decisions about funding human services or educational programs, or whether or not to fund programs and causes in the United States or in Jewish communities around the world. The active value definition that takes place in the philanthropic structure includes prolonged and serious debate about whether or not a particular project is worth giving money to and to what extent and compared to what. While there may be a general consensus that the project is worthwhile and has merit, it may have a third, ninth, or twentieth priority compared to other projects in the Jewish community.

Philanthropic structures force the organized Jewish community to make choices about what is important and what is not, focusing the community on what to fund and what not to fund, and how to allocate perceived scarce philanthropic resources. Indeed, it is in the philanthropic structures that most value clarifications of the Jewish community are now taking place, as opposed to within synagogues, rabbinic, or scholarly communities. Rabbis and scholars are participants in these discussions and debates, but the convening institutions are very often fundraising organizations or the fundraising arms of Jewish organizations. Many Jews look to the fundraising institutions to help define and clarify the mission and goals of the Jewish community. This role is almost as powerful as the one of providing financial resources.

Building Bridges Among Groups of Jews

The fundraising system also serves to build a bridge, foster communication networks, and develop relationships between various segments of the Jewish community. For example, the exchange of philanthropic dollars has largely defined the relationship between American and Israeli Jews. Jews raised money for Israel and expressed their support for the State of Israel by

contributing money. While the nature of that exchange is now undergoing transition, it defined the relationship between these two segments of the world Jewish community for at least the past sixty years. In the absence of common language, highly diversified cultures and great geographic distance, raising money for Israel allowed American Jews to feel a deep sense of connectedness to the Jewish State. Given the key role that Israel played in the development of American Jewish identity for the past three generations, the powerful effect of fundraising as a connector between Israel and American Jews cannot be overemphasized. Philanthropic support for Israel was a clear, unambiguous way for Jews to express their Jewish identity.

Building Bridges to Other Groups in America

The expression of Jewish values outside the Jewish community is also a key function of some components of the Jewish philanthropic structure. Organizations have been created such as Mazon, “A Jewish response to hunger” or the Jewish Fund for Justice, which assists groups in need. These organizations, while under Jewish fundraising auspices, are explicitly designed to serve the non-Jewish community. These institutions are viewed as vital expressions of Jewish values, that is, to feed the hungry, shelter the homeless and so on. The provision of financial support under Jewish auspices is distinctly different than Jews contributing as individuals to secular institutions in American society. Jewish philanthropic organizations, explicitly designed to serve the non-Jewish community, demonstrate a different value; Jewish groups helping non-Jewish society. Such organizations reflect the Jewish obligation to help all human beings in need. These philanthropic structures are intended to fulfill that role and at the same time help build bridges between Jews and other groups in America.

Trends Affecting Jewish Philanthropy

A number of ideological, structural and procedural changes are dramatically altering Jewish philanthropy. First, the Jewish community is witnessing an ideological shift. Jewish identity in the United States is no longer expressed primarily through contributions of money for the support of Israel. Lacking a religious or even cultural basis to otherwise frame Jewish identity, the financial support of Israel largely defined Jewish identity. The institutional base in the United States was created before the establishment of the State of Israel and evolved into an infrastructure built around raising money for the Jewish homeland. Fundraising for Israel became an end almost unto itself. The pride that derived from having a strong Jewish homeland provided the basis for much of Jewish identity in post-World War II America. Israel has been the single most sustaining and unifying element of Jewish identity over the past two generations.

Trends Affecting Jewish Philanthropy
<ol style="list-style-type: none"> 1. Change of ideology away from Israel and assimilation 2. Diversification of purposes and programs 3. Decentralization of fundraising institutions 4. Privatization of allocations and grant-making 5. Demand for greater accountability 6. Increasing influence of women 7. The professionalization of philanthropy

The peace process and the belief that the threat to Israel's survival has diminished, coupled with Israel's growing economic success, have raised questions about the continued need to raise money to support Israel. While most Jews still believe that raising money for Israel is essential, the sense of crisis and imminent doom have been drastically reduced. The growing recognition of higher levels of assimilation revealed in the 1990 National Jewish Population Study made many Jews conclude that American Jewry needed to be strengthened from within and could no longer rely on Israel to solely define its purpose and identity.³⁹ Even those who remain highly supportive of Israel began to question whether this attachment could substitute for an authentic and vibrant American Judaism.

The centrality of Israel is likely to remain part of Jewish identity, but it can no longer substitute for the need of community, a sense of history, and the other elements that define a vibrant community. More and more, Jews are looking for other elements of their Judaism that would include Israel, but not be circumscribed entirely by donating money to the State of Israel.

Furthermore, as the relationship between Israel and the Diaspora matures, other connections between Israeli and American Jews are becoming more frequent and desirable. Jews can express their connection to Israel not only through donating money, but also by becoming involved in Israeli politics or private sector activities, and through many other institutional and personal connections. American and Israeli Jews are looking for ways to connect beyond American Jewish financial support.⁴⁰

For those who want to continue to financially contribute to Israel, the peace process and prosperity stimulate a re-thinking of how to give to Israel, including which mechanisms to use. Donors will have the opportunity to examine their traditional patterns of giving. Programs which enlarge and enrich the community life of Israel — universities, museums, science, and technology — will have more attraction to some donors than will those on the “survival” agenda. Giving to Israel will be much more analytical, and far less automatic and emotional.

³⁹ Op. cit. Council of Jewish Federations. *1990 National Jewish Population Study*.

⁴⁰ Gary Tobin. “Redefining Israel-Diaspora Connections,” in *The Forum*, North American Jewish Forum/United Jewish Appeal, New York, NY, Winter 1993/1994, pp. 29-30, 37-38.

Some are more interested in partnerships, investments, and designated projects within Israel, but still see Israel as their primary avenue for giving to Jewish causes. Many are so committed to supporting Israel that it is psychologically difficult for them to believe that Israel does not need their support. Thus they view the achievement of peace as a lifelong dream being fulfilled and want to be part of the process of ensuring that peace succeeds. Many are also aware of the continued aliyah of Russian Jews. While some believe that the dismantling of the Soviet Union may bring a renaissance of Jewish life in Russia and the other republics of the former Soviet Union, most believe that the vast majority of Jews will continue their exodus from these countries. Most are willing to continue to support the resettlement of Russian Jews in Israel, and the continued aliyah will engender support in the immediate future.

The organized Jewish community also has collectively decided they have too much, rather than too little assimilation. Assimilation ideology dominated the American Jewish community throughout most of this century. American Jews strove to become part of the American mainstream, shedding much of their separate identity consciously and willfully to participate fully in American society. Most Jews believed that they could maintain a minimalist commitment to formal Jewish life in most realms, including learning, worship, organizational membership and activity, ritual observance, and so on, and still be Jewish. Most Jews also believed that they could discard most of their distinctive behaviors and beliefs and not lose their Jewish identity altogether. They believed that they could remain cultural Jews, secular Jews, be “just Jewish,” reaping the full benefits of social and cultural integration into America and still be at heart and soul, Jews. They could remain recognizable to themselves and others as a separate people with a unique history, identity and purpose.

The ending of assimilationism as an ideology could be marked by the release of the 1990 National Jewish Population Study, which revealed a national intermarriage rate of 52%.⁴¹ While some scholars debated whether the intermarriage rate was slightly less, all agreed that the 1990 study documented what everybody had suspected: the rates of assimilation as measured by intermarriage had accelerated dramatically since the 1970s. While the 1990 National Jewish Population Study was not everyday reading for the vast majority of American Jews, the organizational and institutional structure responded with a dramatic outcry that the continuity of Jews was at stake and that a communal response to combat the loss of identity and “too much assimilation” was necessary.

Jewish continuity commissions and task forces sprang up everywhere, committed to the preservation of Jewish life through the transmission of a greater sense of community, identity and connection through formal and informal Jewish education and other programs. Jewish organizations and institutions rededicated themselves to Jewish learning to search for religious meaning and became strong advocates for developing mechanisms to preserve the Jewish community. While few suggested that all Jews become Orthodox, there was a growing belief that the re-establishment of traditional Judaism was necessary to combat communal attrition, and perhaps disintegration. Jewish philanthropy, therefore, turned inward, seeking funds for programs to maintain a separate Jewish identity. The techniques by which those funds would be

⁴¹ J.J. Goldberg. “Whoops or Bad News: Things are Fine — A new study shows the 52 percent intermarriage rate was a mistake.” *Jewish Telegraphic Agency*, column, 28 December 1999.

raised and donor response to the themes of Jewish continuity are still new and emerging territory for Jewish fundraising organizations. Nevertheless, the ideological declaration was clearly made: levels of assimilation should proceed no further, and the Jewish communal structure had to rededicate itself to re-establishing a separate group identity.

The current transition has created something akin to ideological chaos. The end of the primacy of Israel and assimilationism ideologies did not come in the wake of the formulation of alternative ideologies. Rather, the transition has led to an ideological void. Jewish fundraising organizations are seeking to redefine themselves, to develop a new ideology that will redefine the purpose and mission of Jewish life in the future. Some leaders are calling for a return to traditional Jewish values, others are arguing for a combination of tradition and a Jewish renewal that is more adaptive to the realities of contemporary modern life. The search for purpose, the need to redefine mission, and the struggle for institutional identity characterize the contemporary philanthropic structure. While vast amounts of money continue to be raised for the general purposes that have always motivated Jewish giving, there is less certainty about what ultimately is being achieved. The philanthropic structure reflects a fundamental dislocation in Jewish life as the community attempts to redefine what it wants to be.

Second, Jewish philanthropy is increasingly diversified, in terms of purpose. The basic purposes for Jewish fundraising remain essentially the same, divided within broad categories of support for Israel, support for human and social welfare functions, rescuing Jews in danger, building Jewish community, fighting antisemitism, and supporting social justice, in both the Jewish and non-Jewish communities. But these broad purposes are being further refined and subdivided into a vast array of sub-purposes. Support for Jewish health needs may translate into the establishment of Jewish healing centers or conferences on Jewish medical ethics.

Expanded purposes have been accompanied by a tremendous diversification of programs, partly driven by the competition with secular activities and services. Source books of new programs at Jewish community centers, synagogues, day schools, and other institutions show a great deal of experimentation occurring in terms of activities and programs. Jews are no longer constrained to utilize Jewish organizational services. Therefore, a multitude of new programs are being designed to compete with the secular world.

A third major trend is decentralization in fundraising institutions themselves. This decentralization takes a number of forms. The revenue streams within the federation umbrella structure have multiplied to include not only the annual campaign, but major fundraising through endowments, special campaigns, capital campaigns and other mechanisms. The autonomy of divisions within some federations has become more pronounced. Specialized interest groups within the federation sometimes conceive of themselves as more separate and distinct entities. The decentralization within the federation structure has gone so far as to see models of semi-autonomous or almost completely autonomous endowment boards of directors that collect and allocate funds separately from the rest of the federation structure.

The decentralization of fundraising is also characterized by the growing number of fundraising organizations other than federations. It is natural that diversification would have been accompanied by decentralization, reflecting the need for smaller group control within the Jewish

community. Institutions, organizational leadership and individual donors try to find the best combinations of their interests, structures and programs. The decentralization of fundraising can allow for a better match between a specific donor or set of donors and institutional purposes and programs.

The fourth major trend is privatization of allocations and grant-making. Increasing numbers of donors are removing themselves from the public consensus models of federations and making more decisions through the establishment of Jewish family foundations, restricted endowments, and private philanthropic funds. This evolution has occurred because of federal tax incentives coupled with individual desire to control giving. Donors want to feel assured that their money is going to good purposes. This shift towards individual philanthropy does not necessarily mean that individuals have more access to information, a better knowledge base from which to make a decision, more contact with their potential grantees, or a sense of assurance and trust that their monies are being wisely used.

The explosion of Jewish family foundations and the evolving successes and challenges of this system have been documented in a number of recent studies.⁴² These vehicles allow donors to contribute directly to the institutions or programs that they choose, and even to be proactive in creating new programs or initiatives on their own. The privatization of philanthropy takes much of the agenda-setting in the Jewish world out of the public domain and into the private domain of individuals and private institutions. As in the general society, more and more, donors want to be included in project implementation as well as funding.⁴³ The privatization of philanthropy signals a trend where allocations for Jewish communal purposes, both domestically and overseas, will be made increasingly within the specific goals and objectives of the individual donor or family foundation. More funds will be allocated in the Jewish communal realm from restricted endowments, philanthropic funds and private family foundations than through the allocations process of the central umbrella campaign.

Some federations are more successful than others in working with Jewish foundations and individual philanthropists. Some donors identify the federation as the place to turn when they establish their own foundations. Others have built Jewish foundations outside the local federation, even though they may have a supporting foundation or philanthropic fund at the federation.

Many of the representatives of the foundation world see themselves as representing an alternative to the federation system. They pride themselves on not being beholden to anyone, but rather thinking and acting independently within the Jewish world. In many cases, just the opposite is achieved. Working outside the federation system creates more uncertainty and less

⁴² Gary Tobin, Amy L. Sales, and Diane K. Tobin. *Jewish Family Foundations Study*, San Francisco: Maurice & Marilyn Cohen Center for Modern Jewish Studies/Institute for Community and Religion, Brandeis University, November 1996; Gary Tobin, Joel Streicker, and Gabriel Berger. *An Exploration of Jewish Federation Endowment Programs*. San Francisco: Maurice & Marilyn Cohen Center for Modern Jewish Studies/Institute for Community and Religion, Brandeis University, July 1997; Gary Tobin, Michael Austin, Meryle Weinstein, and Susan Austin. *Jewish Foundations: A Needs Assessment Study*, San Francisco: Institute for Jewish & Community Research, 1999.

⁴³ Pablo Eisenberg. "The 'New Philanthropy' Isn't New – or Better." *Chronicle of Philanthropy*, 28 January 1999, 31-32.

control. Many foundations have the illusion of control but in fact reflect uncertainty. Part of these trends are a reaction to the presence of a central umbrella authority, including the specific personalities of current or past leadership of federation — both lay and professional. Ironically, of course, many of the “independents” are also major contributors to federation and may be making substantial gifts to the annual campaign of the federation.⁴⁴

Many foundations view themselves as an alternative voice providing ideas and capital for the development of new initiatives, programs, or institutions within the Jewish community. Federation is sometimes referred to as “big brother,” with all of the negative connotations of an authoritarian regime. Many of the foundations are, of course, also involved in funding programs at the same agencies funded by federations, including Jewish family and children's services, Jewish community centers, Jewish homes for the aged and so on, and foundations often supplement the allocations from the annual campaigns of federations. Still, they feel it is important to maintain independent integrity and not blindly accept federation statements about community priorities and funding needs. Some want an equal voice with federations in setting the community agenda. In some communities, federations have created foundation councils that effectively integrate private and public decision-making between federations and foundations within the local community.

There is also some institutional tension as federations aggressively seek to establish supporting foundations under their umbrella. This dynamic is troublesome for some second- and third-generation family members who may or who not have allegiance to federation and prefer to see separate family foundations with little or no federation influence.

Tensions between federations and foundations are sometimes expressed between their professional staffs. The foundation professional, who in some cases is not Jewish, may not view the foundation as part of the Jewish communal structure, especially if the majority of their funding is to non-Jewish causes. Federation professionals, on the other hand, view these foundations as an integral part of the Jewish community. In some cases, federation and foundation professionals develop special relationships, and facilitate the institutions working together.

The ascendancy of the private domain may have serious implications for Jewish philanthropy in the future. Vast fortunes accumulated by one generation of Jews devoted to Jewish philanthropy may be passed along to professionals and family members with less of a commitment, if any, to the Jewish philanthropic structure. Little is known about the long-term effects, either positive or negative, of the privatization of Jewish philanthropy. But clearly, the ways that monies are raised and distributed will be affected even more as the trend toward private giving continues to grow.

The fifth major trend is a growing demand among donors for greater accountability. This accountability has a number of dimensions. Donors and grantors demand for more efficient use of monies that are raised. The organizations must demonstrate that they are spending funds for programs and not for overhead. Most donors, both large and small, are uncertain about how to evaluate the efficiency of the organization, but accountability and assurances are increasingly

⁴⁴ Op. cit. Tobin, Austin, Weinstein, and Austin. *Jewish Foundations: A Needs Assessment Study*.

important. Donors and grantors also want to be assured that the monies are being spent for the programs or client groups in which they are most interested. This makes umbrella giving more problematic.

Donors and grantors also want to know that there are positive outcomes from the programs they fund. Even if an organization spends nearly all the money it raises (keeping overhead down) on any specific target group through specified programs, the donor will still want to know if there are good results coming from those efforts. Evaluation is a serious issue for foundations, and guidelines are available. Their use, however, is much more problematic, because most foundations do not have the staff or skills to utilize evaluation mechanisms.⁴⁵ Donors have less faith that the organizations will accomplish the goals for they are contributing, but accountability is difficult since there is very little evaluation research that is either completed or disseminated. The success or failure of particular programs or agencies as a whole are generally assessed by images, word of mouth, and general impressions. Rumors of success or failure can greatly facilitate or impede efforts of any particular organization to raise monies. The need for accountability is essential for those who feel the community is at risk from “too much assimilation.” They want to see concrete evidence that these trends are being reversed.

Sixth, Jewish women are increasingly influential in Jewish philanthropy for a number of reasons. More and more women have significant assets, through labor force participation, living past or divorcing wealthy husbands, or inheritance from wealthy parents. These assets allow them to be major contributors and decision-makers. These same factors facilitate more women serving on boards of foundations, where more of Jewish philanthropy is taking place. Jewish women are also assuming more prominent and influential professional roles in federations and foundations. While not one of the 40 largest federations have a woman executive (clearly a major flaw in the current structure), a number of endowment departments have women directors. Given the changing structure of the federation, these positions are sometimes as important as the executive director position. Women are also the presidents or directors of a number of major Jewish foundations. Sometimes these women are the daughters of major Jewish philanthropists serving in professional capacities. Other times they are women with extensive Jewish or secular community experience.

Seventh, Jewish philanthropy is increasingly professionally driven. In the past, the system has depended on heavy lay involvement and direction. The complexity of the current system requires the consistency and managerial skills found in professional leadership. The growing role of the professional has left the lay/professional relationship in disarray. Professionals in the past were primarily implementers and managers. They are increasingly creators, guides and advocates. This leaves the lay role more uncertain, one that must be analyzed case by case, depending on the personalities involved, rather than through clearly defined tasks and responsibilities. Some philanthropists would rather withdraw from active participation than attempt to negotiate this uncertain terrain.

⁴⁵ Council on Foundations. *Evaluation for Foundations: Concepts, Cases, Guidelines, and Resources*. San Francisco: Jossey Bass Publishers, 1993.

Current Constraints in the Jewish Philanthropic System

New versus System Maintaining Programs

Donors struggle with sustaining their interest in system maintaining projects and purposes, when they often prefer innovative, interesting, and new programs. Some see themselves as creators, experimenters, and risk-takers. Others see themselves as pillars of existing communal structures. For many donors, maintaining the Jewish communal infrastructure is not as compelling as building or creating it. It is difficult to evoke continued passion for the funding of day-to-day operations, the ordinary tasks of maintaining older buildings, or raising teachers' salaries. Furthermore, over time the extraordinary and exciting can become ordinary. While bringing 50,000 Jews to Israel from the Soviet Union was new and exciting in 1990, it is part of everyday life in 2000. Donors have a difficult time maintaining peak levels of interest for long-term efforts. Since it is harder for Jews to philanthropically motivate themselves to maintain that which they have built, institutional loyalties become vital. Even if donors can not sustain their passion for a particular cause, if they are vested enough in the institution and believe in its work, they are likely to continue to give.

On the one hand, philanthropists and foundations want to be on the cutting edge, create interesting programs, and feel the excitement of starting something new. They like to solve a problem that has not been properly addressed. But on the other hand, new and exciting projects also carry risks with them — they may fail. Many tend to be ambivalent about their desire to fund innovative projects, contrasted with their loyalty to particular causes or institutions. Habitual giving may not generate enthusiasm, but it is comfortable and a known quantity: it reinforces the loyalty of the giver. A proposal for an exciting new project may elicit a response of great interest and enthusiasm, but also may produce anxiety and uncertainty.

Current Constraints In the Jewish Philanthropic System
<ol style="list-style-type: none">1. New versus system maintaining programs2. Concentrating on “core” versus “marginal” Jews3. Not enough information, too much information4. Need for peer groups5. Need for professional assistance6. Mistrust of fundraising institutions

Concentrating on Core versus Marginal Jews

The debate about funding “core” versus “marginal” Jews is a discussion about the identity of the Jewish people. Core Jews are defined by some sociologists and religious leaders as those who are already more highly identified with Jewish communal and institutional life as defined by

synagogue affiliation, ritual observance, and in-marriage.⁴⁶ Those at the margin are those who are less participatory. Some communal leaders argue that communal resources should be spent on those at the core, strengthening their identity and working outward, while others advocate outreach, spending community resources to help to develop the Jewish identity and participation of those who are less involved. Thus the philanthropic system becomes the facilitator or inhibitor of defining who is in and who is out — even using terms like core and marginal to suggest more authentic or inauthentic members of the group. But the debate tends not to focus on group membership vis-à-vis religious ideology, birthright or ritual practice as one might expect of a religious group. Rather it focuses on the communal strategy of raising and expending funds within the philanthropic system for particular sets of Jews. Therefore, even the very definition of who is a Jew becomes tied to the raising and allocation of funds through Jewish organizations and institutions. While rabbis may be debating who is a Jew and who is not on a religious basis, Jewish organizations and institutions define the core and the margin by how they distribute funds for various programs and initiatives.

Not Enough Information, Too Much Information

Jewish philanthropists and foundations feel that they do not have adequate knowledge about where to contribute to good programs, institutions, and ideas. Most foundations and philanthropists are unsure of what needs to be accomplished, what is important, and what the Jewish community is currently doing. They acknowledge that they do not have adequate knowledge about where to contribute their money and are seeking help. There is a tremendous need for increased support for information collection and dissemination about philanthropic opportunities in the Jewish community, locally, nationally, and internationally.

In many cases, the causes, purposes, and institutions already exist that donors and grantors would be interested in funding. But they have little access to them in terms of learning or engagement. Learning about organizations and institutions to the point of feeling comfortable is both time consuming, and intellectually and emotionally challenging. Since most philanthropists engage in their giving as a part-time activity, past methods of both informing and engaging including committee and board commitments, direct mail, and other past techniques are not suitable for those with intense business, family, and personal commitments. Without better techniques of engagement, information sharing, and trust building, Jewish causes may receive nominal support, even where they represent the mission and values of the donors.

On the one hand, potential contributions are limited by the lack of information and on the other hand, they are inhibited by too much information. A little information from a multiplicity of causes and purposes leaves donors overwhelmed. Major donors undergo something of an information lock-out as a way to protect themselves from the impossible task of trying to judge what is worthy, important, or purposeful from that which is not. Rather than risk making

⁴⁶ Steven Bayme. "Intermarriage and Communal Policy: Prevention, Conversion, and Outreach." In Avis Miller, Janet Marder, and Steven Bayme (eds.), *Approaches to Intermarriage: Areas of Consensus*. New York: American Jewish Committee, 1993.; Jack Wertheimer, Charles S. Leibman, and Steven M. Cohen. "How to Save American Jews." *Commentary* 101(1), January 1996, pp. 47-51.

mistakes in choosing the wrong cause or institution, the individual or foundation blocks out most or all information and continue to support past institutions, or limit new major giving.

The increasing ideological conflicts within the Jewish community contribute to a sense of confusion and disaffection when it comes to developing clear vision and purpose. Some major donors describe the process of deciding how to give money away as a “painful” experience. They are so uncertain and so beset by the number of choices and so far removed from the institutional structures that they feel that they are acting blindly in a system that has rules and procedures that they do not necessarily understand nor with which they feel comfortable.

Some donors have their own research projects or fact finding attempts to help them determine what programs they should support in the future because they are uncertain that their current set of organizations and institutions have the right program, or if the right programs exist. Many donors and grantors, especially through their foundations, are developing their own planning and allocation systems. This multitude of efforts takes place parallel to the community planning functions of the federation.

In addition to mapping community needs and resources, there is another critical need that has been identified: the capacity to identify individual programs or institutional best practices in terms of effectiveness and efficiency. Philanthropists want to know what works the best. What is the best investment of resources? How has the program impacted the larger community? Identifying best practices is critical for those who want to replicate particular approaches within their own communities, within a particular institution, or to address a specific issue.

Few mechanisms are available to assess and disseminate best practices. Therefore, many foundations and professionals have little awareness about innovative programs and institutions supported in the Jewish community. Few federations or foundations conduct program evaluations and, therefore, there is a dearth of information on whether or not grant recipients are successfully utilizing the monies they receive. Most foundations do not have sufficient resources to follow-up with their grant recipients. The larger foundations and those with professional staff may require grant recipients to build an evaluation component into their proposal or involve outside consultants in the evaluation process. But the quality of these efforts is very uneven.

Most often, however, philanthropists and foundations provide seed money, and move from one program or idea to another. Much of Jewish philanthropy is now characterized by impatience and fickleness, a trial and error process that focuses on the trial components, but is not persistent enough to evaluate successes and failures. Indeed, the trial and error system might work if there were actually some long-term attention to assessment. But the lack of evaluation mechanisms inhibits the systematic accumulation of knowledge. Therefore, funding can jump from one project, program, idea, or initiative to another.

Need for Peer Groups

The Jewish fundraising system was built on peer groups, one of the most successful models created in the non-profit sector. Jews gave to other Jews, with social, business and giving level divisions interwoven. Jews are now participants in a variety of American peer groups — geographic, cultural, recreational, educational, and professional, to name a few — that include

primarily non-Jews. Jewish peer groups still operate, but they have much less influence. Some new forms of creative philanthropy are developing to help involve donors and grantors in interesting partnerships.⁴⁷

Severe constraints of time do not allow for very active participation in the traditional roles of serving on committees and boards. Therefore, many are missing the mutually reinforcing benefit of the actions, thoughts, opinions, and giving patterns of their peers. Furthermore, there are a lack of forums for decision-making that involve engaging intellectual and emotional interchange. Moving in and out of organizations, individuals have hit and miss experiences, but not necessarily much opportunity to actively engage in thinking and feeling about their philanthropic participation. A lack of forums is partly a result of an absence of what would be considered “neutral space,” where issues of Jewish communal need and interesting ideas or priorities to be set are discussed in a way that does not adhere to the particular fundraising agenda of any particular institution. The need to engage emotionally and intellectually without feeling handled, pressured, coerced, guided or misguided is very important for those who are already feeling disengaged from the philanthropic system. Technology can play an increasing role in helping Jewish philanthropies connect to one another to build partnerships and helping people of like mind find one another,⁴⁸ but cannot address the need to form personal relationships.

Philanthropy is a part-time activity for most individuals, secondary to business and family, and often to recreation or hobbies. Jewish organizations have been slow to adjust to the needs of philanthropists who engage seriously but episodically, and to find new ways to help them participate. New modes of involvement are especially important for major donors who often feel more secure in making money than they do in giving it away. Furthermore, entrepreneurs want to “go it alone,” but they are also used to doing business through collaboration, interaction, and a variety of partnerships. They look to extend these experiences into their philanthropy.⁴⁹ Developing peer groups and imparting information must be done through processes and mechanisms that are not too time consuming and process-oriented.

The issues of finding the best grantees, developing partnerships, and gathering and sharing information are clearly issues in the world of American philanthropy as well as within the Jewish philanthropic system.⁵⁰ The Jewish community has similar needs for communication mechanisms that will facilitate the sharing of knowledge and the development of partnerships among foundations and philanthropists. There is a strong interest among foundations and philanthropists to work with other foundations and individual philanthropists, but there are few formal structures in place to facilitate this process. Some partnerships have emerged. However, they are the exception rather than the norm, and most philanthropists are not involved in networking or partnerships with other organizations or foundations on funding initiatives.

⁴⁷ UJA Federation of Greater Washington. “Jewish Venture Philanthropy Fund,” Offering Memorandum to Raise \$250,000, 1998/1999.

⁴⁸ Leslie Katz. “Web site helps discerning donors direct their dollars.” *Jewish Bulletin of Northern California*. 6 August 1999, 7.

⁴⁹ Community Foundation Silicon Valley. “Giving Back, The Silicon Valley Way: The Culture of Giving and Volunteerism in Silicon Valley.” taken from website: file:///C1/IN-OUT/finrpt8.htm.

⁵⁰ Michael E Porter and Mark R. Kramer. “Philanthropy’s New Agenda: Creating Value,” *Harvard Business Review*, November-December 1999, 121-130.

The Need for Professional Assistance

A primary need of the philanthropic structure is for a well-developed cadre of professionals to guide existing and emerging institutions, especially federations and foundations. Professionals not only guide the distribution of funds, but also the setting of the communal agenda. A professional cadre is critical to link resources to the causes in which donors and grantors are committed.

Professionals are needed with strong managerial, planning, communication, and coaching skills. Few individuals have the range of skills necessary to provide professional assistance to Jewish philanthropists. Additionally, because there are so few professionals involved in the Jewish philanthropic world, many must work in isolation and have few opportunities to network with other philanthropy professionals. A number of private enterprises are being developed to provide professional assistance to the growing number of foundations and philanthropists that need help in information processing and other grant-making areas.⁵¹

Mistrust of Fundraising Institutions

Jews give away billions of dollars for philanthropic purposes every year, to both Jewish and non-Jewish institutions. However, the Jewish community has accumulated tens of billions of dollars in foundation assets, with billions more likely to flow to the foundations in the near future. Vast resources could be expended for Jewish community-building. There is a contradictory mistrust of existing institutions, coupled with fear of new programs that creates a kind of paralysis.

Philanthropists may feel that older institutions are outmoded and inefficient, but are often mistrustful of new institutions as unproven and, therefore, more risky investments for precious Jewish communal dollars. Lack of trust in existing institutions or emerging institutions, limits the amount of investment that individuals are willing to make in the Jewish communal enterprise. This mistrust is bolstered by the lack of a relationship with Jewish community professionals. The sifting mechanisms that institutions used to provide, that is, determining what are worthwhile causes and purposes and which are not, are not necessarily available to the prospective philanthropists.

Conclusion

Jewish philanthropy is currently in a state of major flux and confusion, facing uncertainty in determining its mission, focus, and strategies. The fundraising messages are contradictory and blurred, reflecting transition within the Jewish community as a whole as it tries to redefine itself

⁵¹ Philanthropic Management Services, Inc. "PMSI: A New Choice in Philanthropic Management," Brochure, Berkeley, CA, 15 July 1997.

in an era of success and acceptance. What happens to a philanthropic structure that is used to motivating people through fear when there seems to be so much success?

The great challenge for Jewish philanthropy over the next decade is how to capture more dollars for specifically Jewish causes in a positive way. For the first time, Jews in America will face the need for self-help, the need to be righteous, and building a new religious/civic system in the absence of crisis. This blessing has thrown the Jewish philanthropic system into chaos. Can Jewish philanthropy acculturate the American value to which it is unaccustomed: building on the positive? While some human service philanthropies in America continue to emphasize threat and despair, most universities, cultural institutions, and health organizations are more likely to emphasize the good that they are accomplishing — the positive aspects of their institution and the privilege of being involved in a success story.

Crisis philanthropy has been a conditioned response in the Jewish community for a very long time. It will be an especially long arduous effort to move away from feeling bad, promoting fear, or being worried in order to increase philanthropic activity within the Jewish community. Furthermore, external threats have not disappeared, even if they have been lessened. Many Jews are still afraid, having shifted from the external to the internal threat of annihilation. Jewish philanthropy has attempted for the last ten years to motivate itself on the basis of the intermarriage crisis, too much assimilation, disappearance through attrition, and the need to prevent a demographic and spiritual disaster. Ultimately, these tactics will not work.

Most Jews do not loathe their freedom, independence, and choice. They like being Americans and all that comes with it. So much in the realm of American philanthropy is positive, joyful and rewarding. One's alma mater, one's professional life, one's recreational life, one's political life, one's cultural life, offer hundreds and thousands of philanthropic opportunities that emphasize that which is good and positive rather than attempting to build on fear and anxiety.

To compete with secular causes, Jewish philanthropy will have to begin the task of emphasizing the joys of Jewish education as a means of personal and communal enlightenment rather than as a preventative against intermarriage or group dissolution. Jewish organizations will have to support associations with Israel as a spiritually and culturally enriching experience for world Jewry. Promoting human services must build again on the principles and values of *tzedakah* — righteous obligation as a means of communal order, and being part of a covenant between one's self, one's God, and one's community. The Jewish philanthropic system, like the Jewish community, must actually come to terms with the positive achievements of Jewish life in America and Israel.

Most lay leaders and professionals are more comfortable discussing what programs should be implemented or funded and what techniques should be developed to help raise money than how to build a positive approach to Jewish giving. The focus in Jewish philanthropy will have to shift to ideology and structure. Jewish fundraising organizations are now forced to examine why they are raising money and for what purposes, the rationale for their fundraising efforts, the motivations for donor involvement and the emerging beliefs and myths concerning contemporary Jewish community. The Jewish community has matured beyond the current constraints of its own philanthropic system.

BIBLIOGRAPHY

Adelson, Evan M. "The Dirty Business of Charity: Raising Money, Reproducing Stratification, and Constructing the Jewish Community." American Sociological Association Paper, 1995.

Bayme, Steven. "Intermarriage and Communal Policy: Prevention, Conversion and Outreach" In *Approaches to Intermarriage: Areas of Consensus*. Edited by Avis Miller, Janet Marder and Steven Bayme. New York: The American Jewish Committee, 1993.

Berger, Gabriel. "Factors Explaining Volunteering for Organizations in General, and for Social Welfare Organizations in Particular" Ph.D. diss., Brandeis University, 1992.

Berman, Sara. "UJA Eclipsed by Targeted Gifts to Israel: 'American Friends' Generate a Shift in Charitable Giving" *Forward*. 6 March 1998.

Brodkin, Karen. *How Jews Became White Folks & What That Says About Race in America*. New Brunswick, NJ: Rutgers University Press, 1998.

Bush, Lawrence, and Jeffrey Dekro. *Jews, Money and Social Responsibility: Developing a "Torah of Money" for Contemporary Life*. A Guidebook with Supplementary Essays by Letty Cottin Pogrebin and Arthur Waskow, with a Forward by Jonathan Schorsch. Philadelphia: The Shefa Fund, 1993.

Campoamor, Diana, William A. Díaz, and Henry A. J. Ramos, eds. *Nuevos Senderos: Reflections on Hispanics and Philanthropy*. Houston: Arte Público Press, University of Houston, 1999.

Carson, Emmett D. *A Hand Up: Black Philanthropy and Self-Help in America*. Washington, D.C.: Joint Center for Political and Economic Studies, 1993.

Cimino, Richard, and Don Lattin. *Shopping For Faith: American Religion in the New Millennium*. San Francisco: Jossey Bass Publishers, 1998.

Clayton-Davis & Associates, Inc. "Religious Causes Draw Most Interest Among Charitable Contributors, Study Shows." From "Affluents Profile Study" conducted for Mercantile Trust. December 1997.

Community Foundation Silicon Valley, "Giving Back, The Silicon Valley Way: The Culture of Giving and Volunteerism in Silicon Valley." taken from website: file:///C1/IN-OUT/finrpt8.htm.

Council of Jewish Federations. *1990 National Jewish Population Study*. New York: Council of Jewish Federations, 1992.

Council on Foundations. *Evaluation for Foundations: Concepts, Cases, Guidelines, and Resources*. San Francisco: Jossey Bass Publishers, 1993.

Diaz, William A., "Philanthropy and the Case of the Latino Communities in America," in *Philanthropy and the Nonprofit Sector*. ed. by Charles T. Clotfelter & Thomas Ehrlich, Bloomington, Indiana University Press, 1999, pp. 275-292

Eisenberg, Pablo. "The 'New Philanthropy' Isn't New – or Better." *Chronicle of Philanthropy*, 28 January 1999, 31-32.

Elazar, Daniel Judah. *Community and Polity: The Organizational Dynamics of American Jewry*. Philadelphia: Jewish Publication Society, 1995.

Fernandez, Sandy M. "Hispanics Erase Myths With Money." *New York Times*, Wednesday, 18 November 1998, sec. G, p. 16

Gold, Steven J. "Women's Changing Place in Jewish Philanthropy," in *Contemporary Jewry*, 18 (1997).

Goldberg, J.J. "Whoops or Bad News: Things are Fine — A new study shows the 52 percent intermarriage rate was a mistake." *Jewish Telegraphic Agency*, column, 28 December 1999.

Greenberg, Richard. "I'll Give It My Way," *Moment: A Conversation on Jewish culture, politics, and religion*, Vol. 23, no. 6, December 1998, 50-59.

Hall, Holly. "The Lost Generation?" *The Chronicle of Philanthropy*, 11;11, 25 March 1999: 25-26

Hausman, Tamar. "U.S. Jews Refocus Donations to Israel, Shifting to Nongovernmental Causes," *The Wall Street Journal*, 5 October 1998.

Havens, John J., and Paul G. Schervish. "Millionaires and the Millennium: New Estimates of the Forthcoming Wealth Transfer and the Prospects for a Golden Age of Philanthropy." w & c revised paper taken from website: http://www.bc.edu/bc_org/avp/gsas/swri/m&m.htn, 19 October 1999.

Independent Sector. *Giving and Volunteering in the United States, 1999, Executive Summary*. Washington, D.C.: Independent Sector, 1999.

Johnson, Paul. *A History of the Jews*. New York: HarperPerennial, 1988.

Katz, Leslie. "Web site helps discerning donors direct their dollars." *Jewish Bulletin of Northern California*. 6 August 1999, 7.

Keirouz, Kathryn S., Robert T. Grimm, Jr. and Richard Steinberg, "The Philanthropic Giving Index: A New Indicator of the Climate for Raising Funds," in *Nonprofit and Voluntary Sector Quarterly*, 28, no. 4 (December 1999): 491-499.

Kent, Donald and Jack Wertheimer. "The Implications of New Funding Streams for the Federation System." *Journal of Jewish Communal Service: A Quarterly of Professional Trends and Developments*. 76, no. 1/2 (Fall/Winter, 1999): 69-77.

Kent, Donald and Jack Wertheimer. "A Revolution in Federated Giving," Opinion, *The New York Jewish Week*, 8 October 1999.

Lehavi, Dorene. "A Survey of Evolving Attitudes Regarding Charitable Giving to Federated Organizations in a Jewish Community," Ph.D. diss., University of Southern California, 1995.

Lenkowsky, Leslie. "Philanthropy and the welfare state: rethinking the partnership." *Philanthropy* 9 (Summer 1995): 5-7, 26-8.

McManus, William E. "Stewardship and Almsgiving in the Roman Catholic Tradition," in *Faith and Philanthropy in America*, ed. by Wuthnow, pp. 115-133.

Mount, Joan. "Why Donors Give." *Nonprofit Management & Leadership*, 7, no. 6 (Fall 1996): 3-14.

National Committee for Responsive Philanthropy. *Community Foundations: At the Margin of Change Unrealized Potential for the Disadvantaged*. Washington, D.C.: National Committee for Responsive Philanthropy, 1989.

National Committee for Responsive Philanthropy. *Community Foundations and the Disenfranchised: A Report on Ten Top Community Foundations' Responsiveness to Low Income and Other Historically Disenfranchised Groups In American Society*. Washington DC: National Committee for Responsive Philanthropy, 1994

Odendahl, Teresa. *Charity Begins At Home: Generosity and Self-Interest Among the Philanthropic Elite*. New York: Basic Books, 1990.

Philanthropic Management Services, Inc. "PMSI: A New Choice in Philanthropic Management," a brochure draft, Berkeley, CA, 15 July 1997

Philanthropy and the Black Church, ed. Alicia D. Byrd. Washington, D.C.: Council on Foundations, 1990.

Porter, Michael E., and Mark R. Kramer. "Philanthropy's New Agenda: Creating Value", *Harvard Business Review*, November-December 1999, 121-130.

Prager, Denis J. "Raising the Value of Philanthropy: A Synthesis of Informal Interviews With Foundation Executives and Observers of Philanthropy." Prepared for: The Jewish Healthcare Foundation of Pittsburgh and the Forbes Fund, 10 August 1998.

"Rabbi Nurtures Young Jews' Quest for Faith and Service." Special Report, Religion Section, *Chronicle of Philanthropy*, 14 January 1999

Raff, Lauren B. "1996 Jewish Population Study of Greater Cleveland." Cleveland: The Jewish Community Federation of Cleveland, February 1998.

Rosenberg, Claude, Jr. *Wealthy and Wise: How You and America Can Get the Most Out of Your Giving*. Boston: Little, Brown and Company, 1994.

Rosenblatt, Gary. "Can Federations Survive?" Other Voices Column, *The Jewish Journal*, 16-22 October, 1992: 35.

Sachar, Howard. *A History of the Jews in America*. New York: Random House, 1993.

Shaw, Sondra C., and Martha A. Taylor. *Reinventing Fundraising: Realizing the Potential of Women's Philanthropy*. San Francisco: Jossey Bass Publishers, 1995.

Smith, Bradford, Sylvia Shue, Jennifer Lisa Vest, and Joseph Villarreal. *Philanthropy in Communities of Color*. Bloomington: Indiana University Press, 1999.

Tarlow, Peter Everett. "Who Gives? Who Leads? A Study of A Voluntary Jewish Fund-Raising Organization," Ph.D. diss., Texas A&M University, 1990.

Tobin, Gary. "Between the lines: Intricacies of major donor communication." In *Communicating Effectively with Major Donors: New Directions for Philanthropic Fundraising*, edited by Dianne A. Brehmer, San Francisco: Jossey Bass Publishers, Winter 1995, 61-77.

Tobin, Gary "Effects of Administrative Cost Perceptions in Major Gift Decisions," in *Financial Practices for Effective Fund Raising*, James M. Greenfield, ed. San Francisco: Jossey-Bass, Inc., May 1994, 95-113.

Tobin, Gary, Joel Streicker, and Gabriel Berger. *An Exploration of Jewish Federation Endowment Programs*. San Francisco: Maurice & Marilyn Cohen Center for Modern Jewish Studies/Institute for Community and Religion, Brandeis University, July 1997.

Tobin, Gary. "The Future of the UJA-Federation of New York." *Guiding Organizational Change: The New York Federation (1986-1996)*, Michael J. Austin, ed. Maurice & Marilyn Cohen Center for Modern Jewish Studies/Institute for Community and Religion, Brandeis University, New York: UJA Federation. Fall 1996.

Tobin, Gary, Amy L. Sales, and Diane K. Tobin. *Jewish Family Foundations Study*, San Francisco: Maurice & Marilyn Cohen Center for Modern Jewish Studies/Institute for Community and Religion, Brandeis University, November 1996.

Tobin, Gary, Amy L. Sales, and Diane K. Tobin. *Jewish Family Foundations Study: Executive Summary*. San Francisco: Maurice & Marilyn Cohen Center for Modern Jewish Studies/Institute for Community and Religion, July 1996.

Tobin, Gary, Joel Streicker, Gabriel Berger, and Minna Wolf. "Jewish Federation of Las Vegas Community Study," Prepared for the Jewish Federation of Las Vegas, November 1996.

Tobin, Gary, Michael Austin, Meryle Weinstein, and Susan Austin. *Jewish Foundations: A Needs Assessment Study*, San Francisco: Institute for Jewish & Community Research, 1999.

Tobin, Gary, and Mordechai Rimor "Jewish Fundraising and Jewish Identity," *Changing Jewish Life: Service Delivery and Planning in the 1990s*, edited by Lawrence Sternberg, Gary A. Tobin and Sylvia Barack Fishman. Westport, CT: Greenwood Press, 1991, pp. 33-54.

Tobin, Gary, and Mordechai Rimor "Jewish Giving Patterns to Jewish and Non-Jewish Philanthropy," *Faith and Philanthropy in America*, Robert Wuthnow and Virginia A. Hodgkinson and Associates, Editors, pp. 134-164. San Francisco: Jossey-Bass Publishers, 1990.

Tobin, Gary, with Sharon L. Sassler *Jewish Perceptions of Anti-Semitism*. New York: Plenum Press, 1988.

Tobin, Gary. *Jewish Philanthropy: Patterns of Giving to Charitable Causes in Greater Philadelphia*. The 1996/97 Jewish Population Study of Greater Philadelphia, Special Report no. 4. New York: Ukeles Associates, 1998.

Tobin, Gary. *Opening the Gates: How Proactive Conversion Can Revitalize the Jewish Community*. San Francisco: Jossey Bass Publishers, 1999.

Tobin, Gary. "Planning, Allocations, and Financial Resource Development in the Federation System." *Journal of Jewish Communal Service*, Fall-Winter 1995-1996, pp. 12-21.

Tobin, Gary. "Potential Major Donors of the Greater East Bay." Prepared for the Jewish Federation of the Greater East Bay. San Francisco: Maurice & Marilyn Cohen Center for Modern Jewish Studies/Institute for Community and Religion, Brandeis University, February 1996.

Tobin, Gary. "A Qualitative Analysis of Contributors to Jewish Philanthropies," *Papers in Jewish Demography 1993; Selected Proceedings of the Demographic Sessions held at the 11th World Congress of Jewish Studies*, ed. Sergio DellaPergola and Judith Even. Jerusalem: The Avraham Harman Institute of Contemporary Jewry, 1997.

Tobin, Gary, and Mordechai Rimor. "The Relationship Between Jewish Identity and Philanthropy." in *Contemporary Jewish Philanthropy in America*, edited by Barry A. Kosmin and Paul Ritterband. Savage, MD: Rowman & Littlefield Publishers, Inc., 1991, pp. 33-56.

Tobin, Gary. *Trends in American Jewish Philanthropy: Market Research Analysis*. Maurice & Marilyn Cohen Center for Modern Jewish Studies, Brandeis University, Policy and Planning Paper 8, April 1992.

United Jewish Appeal. "Donor Acquisition Report: Summary of Results" Prepared by Heartland Marketing Group, Ltd. 4 November 1994.

UJA Federation of Greater Washington, "Jewish Venture Philanthropy Fund," Offering Memorandum to Raise \$250,000, 1998/1999.

Wagner, Lilya, and Ricardo Rodriguez. "Applying and Disseminating the Values of Stewardship and Philanthropy in Hispanic/Latino Institutions and Communities." Working Paper - Council on Philanthropy - get from Amazon

Wertheimer, Jack. "Current Trends in American Jewish Philanthropy." In *American Jewish Year Book 1997: A Record of Events and Trends in American and World Jewish Life*, edited by David Singer and Ruth R. Seldin, Volume 97, 3-92. New York: The American Jewish Committee, 1997.

Wertheimer, Jack, Charles S. Leibman, and Steven M Cohen. "How to Save American Jews." *Commentary* 101(1), January 1996, pp. 47-51.

Woocher, Jonathan. *Sacred Survival: The Civil Religion of American Jews*. Bloomington, IN: Indiana University Press, 1987.

Wuthnow, Robert. *Acts of Compassion: Caring for Others and Helping Ourselves*. Princeton, NJ: Princeton University Press, 1991.

Wuthnow, Robert, Virginia A. Hodgkinson, and Associates. *Faith and Philanthropy in America*. Washington, D.C.: Independent Sector, 1990.