

*Toward a Renewed
Ethic of Jewish
Philanthropy*

EDITED BY
Yossi Prager

Robert S. Hirt, Series Editor

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For the Poor and the Stranger: Fundraisers' Perspectives on Orthodox Philanthropy

Margy-Ruth Davis and Perry Davis

INTRODUCTION

We approach this assignment instructed that our combined fifty or more years as professional fundraisers are important, or at least instructive. In 1986, we started a fundraising consulting firm that we continue to run. It is from this experience that we are expected to draw conclusions about Orthodox philanthropy that carry the weight of “real world” experience.

This is a mighty expectation, but not one to be taken too seriously. Our client roster at Perry Davis Associates was not selected

in any scientific manner and may include significant gaps that will distort some findings and conclusions. We have not kept a journal recounting important lessons learned. For their part, the sociologists and halakhic authorities contributing to this conference have had their own extensive experiences within the community.

So it is important to make clear at the outset who we are and what we offer. Both of us are products of Yeshiva University education. We are self-trained in the work of fundraising, and we are Orthodox Jews who modestly make our own charitable contributions. We have had a lot of experience looking at nonprofit organizations and leaders—Jewish, Orthodox, and non-Jewish. We have also worked closely with donors large and small. Our goal, simply, is to reflect on these experiences as we respond to the questions presented.

This paper will begin by addressing general trends in Jewish philanthropy and move on to a discussion of Orthodox giving in particular. Similarities to overall charitable giving will be noted, and then the paper will focus on the unique positive and negative points of Orthodox philanthropy. Finally, we will raise some practical concerns, note new trends, and make recommendations related to Orthodox philanthropy.

What Are the Trends in Jewish Philanthropy today?

As a whole, Jews do not give more than anyone else.

Steven M. Cohen, a sociologist of American Jewry at Hebrew Union College–Jewish Institute of Religion in New York, offers what many would consider unexpected statistics on Jewish philanthropy. According to Dr. Cohen’s research: “Jews are no more charitable than the rest of the U.S. population—they give slightly less than 2% of their income to charity—and they’re increasingly giving to non-Jewish causes rather than Jewish causes.”¹

Still, we observe and are told that there is a disproportionately greater percentage of wealth in the Jewish community and a disproportionate number of Jewish philanthropists. In 2007, four of America’s five largest donors were Jewish—each committed or donated \$500 million or more—but, again, most of their money was divided among non-Jewish causes.²

This is confirmed by our own extensive research into Jewish foundation giving. Jews continue to be generous to charities, but not necessarily to Jewish organizations.³

According to the Institute for Jewish and Community Research (IJC) headed by Gary Tobin:

- Jews “accounted for 1,107 mega-gifts from 2001–2003, which amounted to nearly \$7 billion. Jewish giving represented 12% of total gifts and 16% of total dollars among all American donors.”
- This example is illustrative of the general trend; of the gifts over \$10 million, only 5% went to Jewish causes, down from 6% in the previous period. Jewish philanthropists made just 11 gifts of \$10 million or more totaling \$269 million to Jewish causes.⁴

Tobin added that \$269 million is probably a generous estimate, “as he and his researchers were lenient in classifying Jewish causes.” For example, they included a \$25 million gift to Mount Sinai Hospital and two \$32 million allocations from the AVI CHAI Foundation to its Israeli offices as part of the total.⁵

Unlike Orthodox philanthropists, non-Orthodox Jewish and non-Jewish mega-donors generally contribute to arts and higher education rather than for social services. According to another study by Gary Tobin: “Human services, federated charitable appeals, including Jewish Federations and United Ways and civic causes, combined for just over 1% of total dollars from gifts of \$1 million or more between 2002 and 2007.”⁶

Younger donors are not giving to Jewish causes, let alone established Jewish causes, and at the same time, they want to have much more decision-making power on where to give. This has led to a decline in Federation giving. According to a recent report by United Jewish Communities, Federation giving has declined “precipitously” among Jews under 50. The same report found that nearly half of Jews between 55 and 64 gave to Jewish causes, while less than one-third of those between 18 and 34 did.⁷

If established causes like Federation are not attracting younger Jewish donors, what is motivating their giving? Rabbi Jacob J. Schacter,

Yeshiva University professor of Jewish history and thought, speaks of the “religion of the sovereign self.”⁸ He credits Steven Cohen and Arnold Eisen, stating:

The principal authority for contemporary American Jews, in the absence of compelling religious norms and communal loyalties, has become the sovereign self. Each person now performs the labor of fashioning his or her own self, pulling together elements from the various Jewish and non-Jewish repertoires available rather than stepping into an “inescapable framework” of identity—familial, communal, traditional—given at birth. . . . American Jews speak of their lives, and of their Jewish beliefs and commitments, as a journey of ongoing questioning and development. They avoid the language of arrival. There are no final answers, no irrevocable commitments. There are no longer any norms that are compelling, there are no loyalties, no fundamental givens.⁹

Seen as a “black hole” by most Federations and many mega-donors, day schools and other more standard Orthodox causes are rarely the recipients of secular Jewish grants and donations. The AVI CHAI Foundation and the large foundations supporting the Partnership for Excellence in Jewish Education (PEJE) are the exceptions to this general rule.

Finally, as general Jewish grant making becomes more discretionary and personal, some donors have begun to approach philanthropy in a more systematic, critical, and businesslike fashion. This is perhaps the most instructive and useful lesson for Orthodox philanthropists and will be explored in greater depth below.

HOW DOES ORTHODOX PHILANTHROPY COMPARE TO GENERAL JEWISH/GENERAL SECULAR GIVING?

Orthodox donors are similar to non-Orthodox donors in many ways. Rabbi Adin Steinsaltz once quipped, “The Jews are like everyone else, only more so.” In that vein, one might also add, “Orthodox donors are

just like all other donors—only more so.” While it is true that Orthodox Jews are responding to the divine command of the halakhah, they are also driven by the same very human motivations that propel all giving, at least in our society.

The first question every donor asks, whether consciously or not, is “Will I benefit?” Benefit may be tangible; it may be psychological; it may even be spiritual or posthumous—but there is a quest for benefit nonetheless. The story is well known of the Orthodox donor who established a new yeshiva for his children because he was dissatisfied with the educational standards elsewhere. Other benefits abound as well: the recognition of one’s peers, a sense of satisfaction, relief from guilt (perhaps induced by the solicitor), the desire to leave a legacy for one’s children, and even the belief that one has somehow “earned” one’s vast fortune through giving back.

The most fundamental rule of fundraising—“people give to people”—also applies to the Orthodox donor. We know that the person making the “ask” is the most important element of a solicitation, and that the solicitor can inspire a reaction based on friendship, business, or social obligation. The benefit here lies in the mutuality of the relationship.

We also have learned that many prospective donors will react best to a solicitation that lays out a vision—and that being a part of a larger dream can be a great benefit to donors. The square footage of a new school building or the key elements of a new program are less important than the lofty goals for students that this new “home” will provide or the alleviation of pain and suffering that a new hospice can provide.

Benefits may be communal as well as personal. The Orthodox congregation Shearith Israel—also known as the Spanish and Portuguese Synagogue—is America’s oldest Jewish congregation. Its long and rich history is filled with stories that illustrate the congregation’s efforts at *darchei shalom*, the fine art of being a tiny and free minority in a new Christian environment.

[T]he Jews of New York also participated in charitable acts towards members of other groups. In 1671, Asser Levy

advanced money to the Lutherans of the city to enable them to establish their first church in New York. In 1693, the General Assembly of New York passed an act that levied assessments on all citizens in order to support the ministry of the Church of England at Trinity Church. In a spirit of communal cooperation, thirty-four Jews paid their share. In 1711, Trinity Church raised funds for the completion of its steeple. Seven Jews, including . . . the congregation's hazzan, Abraham Haim de Lucena, were among the contributors.¹⁰

But there is a deeper issue lurking behind the question “Will I benefit?” It is: Who is the “I” here? How do I see myself? As I make this contribution, am I doing so as an Orthodox Jew? As an American? Does this contribution fit into my view of who I am? When I give to save the people of Darfur, am I doing so out of a Jewish obligation—or am I reacting on a simple human level? For better or worse, many of us live bifurcated lives, seeking to satisfy several sets of obligations at once, whether real or imposed.

Alternatively, we may choose to draw a very small circle and define the “I”—the one who will benefit—in the narrowest of terms.

Rabbi Josef Ekstein is the founder of Dor Yesharim, an extraordinary initiative that has all but wiped out Tay-Sachs disease in our lifetime through the simple mechanism of pre-*shidduch* genetic testing. One might think there could be no greater cause than saving so many Jews from needless suffering. Yet Rabbi Ekstein tells us that when he approaches Orthodox donors, he is sometimes told, “I only give to Torah causes.”¹¹

The rabbi's prospective donors may not simply be brushing him off. Instead, they are saying that in their value system, nothing is more important than Torah learning—they see themselves as devoted to Torah, first and only.

Yet the members of Shearith Israel were among those who saw themselves as part of the larger world. On March 8, 1847, Chazzan Jacques Lyons addressed the congregation with an appeal to help victims of the great Irish potato famine. He said that all should continue

to contribute to the immediate needs of the congregation and the local Jewish community but added that there was one “indestructible” and “all-powerful” bond between the Irish victims and the Jews: “That link, my brethren, is Humanity! Its appeal to the heart surmounts every obstacle.”¹²

As we know anecdotally, and as is confirmed by a recent Pew study of religion in America,¹³ religious identity is very fluid in our times. It is not unusual for father and son, even in prominent Orthodox families, to define themselves quite differently. There is the generational story of Max Stern and his son Leonard. Max founded Stern College for Women and was one of the pillars of Yeshiva University. Leonard, too, is the pillar of a university and has named one of its colleges. The difference is that Leonard’s allegiance is to New York University, and his school is the Stern School of Business. The father gave to YU; the son gives to NYU. The move from Yeshiva to New York may be seen as the shift in identity from American Jew to Jewish American.

The question “How do I see myself” is at the heart of a vigorous debate about Jewish philanthropy and goes to the very status of Jews, and even Orthodox Jews, in our welcoming and generous society. Here is how Richard Marker, the former director of the Samuel Bronfman Foundation and now a professor of philanthropy at New York University explained the issue:

[I] think it is a definition of the way in which the Jewish community sees itself as an open society. A person who supports a university that has Jewish studies may feel they are better supporting Jewish life in America than they could by supporting a day school. If someone gives money to Harvard or the University of Pennsylvania . . . they can say, “My goodness, look at this university where people can get kosher food and be shomer Shabbat [Shabbat observant]. Why am I not supporting a vision of Jewish life in American society?”¹⁴

How is Orthodox philanthropy different?

Yet despite the similarities to larger trends in philanthropy, Orthodox giving is still very much a product of its own culture and circumstance. Several elements drive our tzedakah.

Above all, Orthodox philanthropy differs from secular philanthropy because it is impelled by a religious obligation. The obligation applies to rich and poor alike, and its origins are found in the Torah itself. When the Jews of the Exodus were each asked to contribute a half-shekel for the construction of the Mishkan, they were told, “The rich shall not give more, and the poor shall not give less.”¹⁵ Halakhah provides guidelines for how much we must give, what our priorities ought to be, and how we are to make the donations. For example, we are instructed that anonymous giving is preferred and that a double-blind gift is ideal. At the same time, the concept of a “giving heart” emphasizes the benefits of voluntary acts and sanctions the subjective and free-will aspects of tzedakah. But give we must.

In light of this religious obligation—and the way tzedakah has been defined over the millennia—the term tzedakah is more elastic for Orthodox Jews than it may be for others. In Orthodox terms, giving tzedakah is not necessarily synonymous with the gifts the IRS considers tax-deductible. Yeshiva tuition payments are not tax-deductible, even though the cost of educating one’s child is often considered part of the halakhic definition of tzedakah. The IRS will likely disallow the cost of supporting an adult child as he sits and learns in yeshiva; halakhic authorities may include this cost as part of *ma’aser*, tithing.

Other expenses associated with Orthodoxy are rarely journalized as *ma’aser*: the extra costs of kosher food and the mitzvah of hospitality that permeates our community on Shabbat or holidays. In addition, Orthodox Jews do not tally the economic value of the “opportunity-time” lost as they volunteer countless hours to fulfill mitzvot. Yet all of these instances of “giving” are part-and-parcel of the Orthodox ethos of philanthropy.¹⁶

Beyond its halakhic mandate, giving tzedakah is also reinforced culturally, and is indeed highly mimetic. Most of us remember being sent to school each day not just with lunch money but with some coins

for the *pushke* (charity box). The obligation is reinforced twice a day, six days a week, as the *pushke* is passed around during prayers. And the sense of obligation is “exploited” by *meshulachim* (solicitors) knocking on our doors on Sunday or calling in the evening—aware of the fact that the outstretched hand of the hungry or needy Jew may not be ignored. Even on Shabbat, the most sacred activity—reading the Torah portion—“takes a break” for fundraising at the *Mi Shebeirach* prayer and the most elemental activity, *Kiddush*, is often used as a memorial sponsorship opportunity for a *Yahrzeit*. Indeed, charitable giving is built into the liturgy of *Yizkor*.

We should point out that many non-Orthodox donors tell us that their early experiences in traditional homes are still fresh in their minds. However much they may now be part of the American mainstream, they still remember that their childhood and adolescent years were infused with table talk about Jewish crises and the need to—at the very least—make a generous contribution to the Jewish National Fund or the local synagogue. Sadly, this generation is disappearing from the scene; their children often do not have the same sense of history.

For today’s Orthodox families, however, that table talk—the focus and attention paid to Jewish concerns—is still very present. As they look around their communities, the Orthodox find that their giving is often motivated by sheer pragmatism and practicality, even beyond the halakhic and mimetic forces that we have just described. It is the very uniqueness of Orthodox communities that makes *tzedakah* so compelling. For example, Orthodox Jews must reside within walking distance of their synagogues if they wish to attend services on Shabbat. This proximity, this clustering, produces close-knit communities and local loyalties. Three communal centers of Orthodox Jewish life—the shul, the school, and the mikvah—are unsustainable without charitable support. And, in turn, the community itself cannot survive without these institutions.

In recent decades, the local Jewish Community Center has become another center of Jewish life, and it, too, seeks user support. All denominations, for example, contributed nearly \$100 million to

build the Manhattan West Side JCC. While many Orthodox Jews feel the compulsion to add the JCC to their “must-do” local charities, for non-Orthodox Jews it has often trumped the other three centers.

Institutional loyalty, especially at the local level, may be more important for Orthodox Jews than for other donors. Forced proximity often serves to reinforce community commitments. We greet one another as we walk to synagogue on Shabbat; we see one another in the butcher shop; we learn with each other in the *beit midrash*; and we send our children to the same schools that our neighbors do. These simple, neighborly acts reinforce our identities as members of a community, responsible for community institutions and “in it” for the long term.

For a different perspective, last year our firm was asked to help a Reform congregation in New Jersey complete a modest capital campaign. Our efforts were impeded by the synagogue’s revolving-door membership. Each year, about fifty new families join the temple, in preparation for their children’s bar and bat mitzvah celebrations. And each year, about that many resign their memberships as their children become teenagers and the temple is no longer needed. It became painfully clear that about half of those on the roster of this 500-family congregation were “consumers,” not members. They did not see themselves as part of an ongoing community whose purpose is larger than their own personal needs. Instead, the synagogue became a service contracted, much like a gym membership.

Judging by our anecdotal experiences, Orthodox wealth is growing, but there are still only two or three Orthodox mega-donors, in the American sense of the term. To take an almost random sample, of the 400 richest Americans—as listed in the 2007 edition of the *Forbes 400*—about 25 percent are Jewish or come from Jewish families. While Orthodox Jews comprise about 10 percent of all American Jewry, none of the approximately 100 individuals on the *Forbes 400*, as far as we can tell, is an Orthodox Jew, although one does have ties to Chabad.

Although we may have less, however, there seem to be more demands upon us, more claims on our charitable dollars from within our own communities. Orthodox Jews are faced with competing demands that find little parallel in general society. Charedi neighborhoods are

still among the poorest ones on the Jewish scene, and their needs are concomitantly greater: kosher food for Shabbat and holidays, dowries for brides, welcoming strangers and guests, emergency health needs, and, above all, the cost of education at every level. Some of the additional costs come from the socially approved high birth rate and from the communally endorsed practice of full-time learning. Both mean that parents and/or wives—who mostly have only high school or specialized degrees—are supporting large families. The strain can be enormous.

And it's not just Charedi Jews who are feeling the strain of competing priorities. According to a position paper developed by the Orthodox Caucus, "to 'tread water,' a modern Orthodox Bergen County family with three or four children in day schools needs approximately \$250,000 annually in pre-tax income. Family size seems to be rising as well, with many families having four or more school aged children." According to the Caucus, the single largest expense faced by these families is day school education. Over the past four years in Bergen County day school, tuition has risen by an average of 7 percent; scholarship funding has grown by 12 percent, and the number of children on scholarship has grown to 27 percent.¹⁷

The Orthodox community has responded in unique and very positive ways to these additional burdens. Local Orthodox agencies and their donors respond to physical and ritual needs. Tomchei Shabbos, the *g'machs* (charity centers) that provide everything from loaner wedding dresses to living-room furniture, free-loan societies, and scholarship funds—all these grass-roots, home-grown efforts are meant to help out one's neighbor.

Orthodox Jews also tend to blur the line between tzedakah and chessed, and when they do, their efforts often extend beyond the community. Contrary to some widely held beliefs, many Orthodox chessed organizations serve all those in need, regardless of denomination. *Bikur cholim* societies visit every Jewish patient at the hospital regardless of denomination; volunteers pack the food bags at Tomchei Shabbos for Charedi homes and for the homes of new immigrants who may not have any affiliation; and Hatzalah

paramedics help all those in distress, regardless of religious affiliation. Thousands of Orthodox Jews go far beyond writing checks and donate time, money, and emotional devotion in order to aid all Jews.¹⁸

The above examples all underscore the local nature of much Orthodox giving. Even so, local giving may have national policy ramifications. Specifically, yeshivot and Jewish day schools may be local, but Jewish education policy is a communal issue of national importance. It is primarily Orthodox Jewry that has shouldered the financial and communal burdens of the Jewish education network. As Marvin Schick has pointed out:

We now recognize that day schools are crucial to our communal well-being, to any prospect for Jewish continuity. This alone should induce gratitude for the Orthodox contribution to the larger community. They sustained the belief in day schools in the face of harsh neglect, and they established these institutions in dozens of communities through their personal giving and sacrifice. . . . The Orthodox schools have especially reached out to the needy, as well as to immigrant and marginal families, by maintaining scholarship policies that demonstrate concern for families that cannot afford full tuition or who are unwilling to pay it.¹⁹

These stellar virtues, however, are balanced by the limitations—in some cases, the flaws—inherent in Orthodox giving, as we see them.

Because so much of giving reflects how we see ourselves and how we want to be seen, Orthodox Jews tend to ignore those issues which seem to be an affront to the Orthodox way of life. Domestic abuse, the plight of the *agunot* (“chained wives”), mental disabilities, drug addiction among Orthodox teens: it is difficult to admit that we have these problems, and even more difficult to address them. Especially in locales where any flaw—whether real or perceived—might wreck a proposed marriage match, the pressure is to conform and to smooth over the rough edges of our humanity.

Orthodox giving is also often insular. It is true, as we have noted above, that Orthodox institutions, funded by Orthodox donors in the main, assist many who are not Orthodox. But it is also true that Orthodox Jews shy away from Federations and other charitable venues where they are not in control. When Federations are seen as the “other”—that is, belonging to non-Orthodox Jews—then their utility is measured by how much they help “our” causes. The larger picture can be lost. Has any effort been made to influence Federation policy? Is it simply seen as a “lost cause”?

So much of giving depends on how we define ourselves. Are the *ba’alei teshuva* (Torah-observant Jews who were not raised as such) “us,” or should they be seen as “other” because they do not share our experiences and backgrounds? In 2007, when the Novominsker Rav, Rabbi Yaakov Perlow, announced that the Agudah should focus more on *kiruv*, outreach to the non-Orthodox, some of our Charedi acquaintances objected. They cited the limited resources of communal dollars, and questioned whether they should be spent for outreach efforts that are not certain to show real results.

Other limitations of insularity—the flip side of community—lie in the ready forgiveness we show to the failings of our own. Orthodox Jews allow themselves liberties in their charitable endeavors that would never be tolerated in American business life, or in their lives on the “outside.” Orthodox giving is often sloppy; professional standards can be low—often because charities are founded “on the ground,” by individuals who see a need and want to respond to it, but do not have the training or education needed to sustain the organization’s growth. There is often a disdain for the donor—if I am doing God’s work, why should I tell you precisely how your money is being spent?

Some organizations are on the line—or over the line—of illegality. The same insularity sometimes suggests that it is okay to cheat other Jews, or the government—all seen, again, as “the other.” The Hasidic leader recently indicted for money laundering is only a recent example of this point, and other scandals can, unfortunately, be readily found through the decades.

Insularity leads some Orthodox donors and professionals to say “I am my charity”—for the founder to see his organization and

himself as one. That outlook leads, for example, to the blurred lines between dynasty and nepotism—hiring one’s relatives, handing over the leadership to one’s children without regard to their suitability. It also means that the founder often ignores the lay board and closest donors in the belief that she or he is the organization’s key shareholder and that the others have no say. Such an attitude may be at the heart of the scandal that rocked and helped unseat the Israeli prime minister at the end of 2008.

Finally, naive compassion by donors is hardly a virtue. Unwarranted trust translated into an unwillingness to ask tough questions of charity recipients does no favor for the recipient nor for the donor who might improve the value of his/her gift with prudent demands for accountability. Proper due diligence might also redirect the charitable dollar to a more appropriate and worthy recipient—all for the overall good of the community. Lax donor standards, however, are hardly a uniquely Jewish problem. A recent study by the Center for High Impact Philanthropy found that donors with a capacity of \$1 million annual giving or more had negative views of evaluation, relied on peers for advice on their giving, and worried that their investigation would indicate a “lack of trust” in the recipient or would overburden them. They did not want to be perceived as “high-maintenance donors.”²⁰

Finally, and ironically, in one respect at least we are not inward-looking enough. For all of the focus on community, Orthodox Jewry lacks the cohesiveness and the benefits of the earlier *kehillah* systems—times when the community as a whole undertook to care for its own, rather than leave it to wealthier Jews to pick and choose their own priorities. In effect, therefore, Jewish education—again an instructive microcosm of Jewish philanthropy—has gone from being communally supported to a user-pay system:

The system is broken. For millennia, the responsibility of funding Jewish education fell on the broad backs of the entire Jewish community—consistent with the idea of Jewish education as a communal need and the most important key to Jewish survival. The last 75 years in

America have seen a shift to a user-pay system. The burden falls on a much narrower—and inherently less financially able—group: the parents of young children.²¹

How can Orthodox giving be improved? **SOME QUESTIONS TO CONSIDER**

We have so far described the Orthodox donor and the milieu in which she or he lives. We have pointed out both the virtues and the flaws of Orthodox philanthropy. The question remains: How can we do better? Taking into account our halakhic imperatives and our place in American society, what can we learn from our own tradition and from the world around us?

Do We Behave in a Halakhically Modest Manner?

Are we wasting funds as we glorify ourselves? With all the discussion of halakhic imperatives, are we in fact behaving in accord with the ideals of Orthodoxy? Celebrations of charitable giving—better known as the annual dinner—have become increasingly lavish as Orthodox donors want to see themselves as part of society's upper strata. As an extreme, but by no means an isolated, example: a recent Orthodox fundraiser boasted both a 15-piece orchestra and three hours of speeches lauding two honorees.

Jewish billionaire William H. Gross, himself not Orthodox, recently commented: "A \$30 million gift to a concert hall is not philanthropy, it is a Napoleonic coronation."²² In our own terms, a \$10 million contribution toward a yeshiva building should not be cause for a coronation either. We might take a closer look to see how the laws of modesty, of *tzniut*, apply to Orthodox philanthropy and Orthodox private events (weddings, bar mitzvah celebrations, etc.). Attempts to promulgate and enforce sumptuary laws have largely failed.

Do We Sufficiently Support Our Own Orthodox Institutions?

The short answer is: not enough.

- There are more poor Jews in the United States than in Israel, and many of them are Orthodox.²³

- Our yeshivot and day schools continue to struggle—as do our young families as they face rapidly rising tuition rates. In addition to placing strains on these families, we lose the students whose parents cannot afford a Jewish education.
- And we continue to sweep unpleasant issues under the rug, preferring not to deal with such vexing communal issues as Orthodox domestic violence, single-parent families, drug abuse, and mental disease, among others.

Further, while we know the actual rate of giving among Jews as a whole, no study has yet been done on the rate of Orthodox giving. Are we really giving as much as we should?

Do Donors Care Enough About How Our Money Is Being Spent?

Once the dollar leaves your pocket, do you have an obligation to follow it until it is used as directed? Or is your halakhic obligation simply to give the funds? If we are investing funds in our community, shouldn't we track its return? We are missing the very essence of the mitzvah if we do not apply the same rigor to our tzedakah that we do in other aspects of our lives.

In many ways, this is the simplest of the questions to answer. The secular philanthropic world has much to teach us in this regard:

- *Research prospective charities.* If possible, visit the center where the money will be spent. Speak to beneficiaries. More and more frequently, American philanthropists employ giving advisers who will investigate an organization's structure and paperwork before they finalize their pledges.
- *Train fundraising professionals.* The high turnover in fundraising professionals is symptomatic of unrealistic expectations coupled with inadequate preparation and a fee structure that often relies on commission and contingency.
- *Make sure the funds are used wisely.* "With today's donors it is more of a business transaction," according to Stacy Palmer,

editor of the *Chronicle of Philanthropy*. “They want to know they are getting the most out of it.”²⁴

- *Face up to failures.* In a recent annual report, the Carnegie Corporation showcased its grant to the government of Zimbabwe and noted, “This is the anatomy of a grant that failed.”²⁵
- *Defund projects that don’t work* and shift funds to programs that are likely to have a greater return on investment.
- *Ask for—and evaluate—specific performance measures.* Israeli philanthropist Avi Naor advised, “There is no justification for investment that does not have a measurable and proven return.”²⁶
- *Consider mergers as a way to eliminate waste and duplication.* A managing director at Accenture, Walt Shill, commented, “This is a trend that is going to accelerate. . . . Many people on nonprofit boards have been through for-profit mergers and see the benefits.”²⁷
- *Increase the size and impact of free loan funds.* Much larger revolving loan funds, especially at the larger communal level (beyond the local *g’machs*) may be useful in helping indigent families meet extraordinary needs. Payback can be stretched over time, family budget planning services may be offered or required as part of the loan terms, and the fund could be automatically replenished. This will help us to aid many more families.

Do We Sufficiently Support the Larger Jewish and Non-Jewish Community?

As a whole our experience tells us that the centrist Orthodox community supports secular Jewish causes and, to a much lesser extent, non-Jewish causes.

Our own review of foundation tax returns—all of it public information and available online—shows that many prominent modern Orthodox donors give quite broadly—mostly to Orthodox institutions here and abroad, but also to secular Jewish and Israeli causes and to hospitals and medical research. The secular Jewish beneficiaries are often local community centers or social service agencies—again reflecting the local nature of Orthodox giving. Local Federations are

often included in the roster of major gifts. Younger Orthodox donors tend to give to more secular causes, and to target their giving, as do younger donors in general.

How Do We Choose to Give?

As noted above, how we define ourselves and how we want to be seen by others remain a pivotal element that influences our giving. In addition, Orthodox donors are influenced by inertia—giving patterns become habitual. So how are the patterns broken? There are always limited resources available. Tuition, poverty, and other crises in our local communities, in the United States, and in Israel present a barrage of new demands. How can limited resources be allocated? More starkly, how do we decide what to ignore? Can we afford to focus only on the closest concentric circles of demand?

The drumbeat of criticism against the insularity of the Orthodox donor is incessant. But consider this story. In the 1990s, the Detroit Jewish Federation (not an Orthodox group by any means) grudgingly did a census of its Jewish population. One of the most active Federations nationally, the Detroit agency felt a census was not really needed; it knew almost all 60,000 Jews in the area. The Federation did find those 60,000 Jews—but it found 30,000 more—Jews who were “hiding” in plain sight and were not affiliated with the community. A debate then ensued: did the Federation have enough money to increase its services by 50 percent? If those Jews had not wanted to be found, was the Federation obligated to serve them? *All* donors, Jewish, non-Jewish, and the Orthodox, face these dilemmas, and the concept of triage looms very large.

Assume—as many of us try to do—that we were able to develop a clear, thoughtful, and halakhically sound annual giving plan: would it prevail against the unexpected demands arising during the year—the dinner we have to go to because our friends are being honored, the synagogue boiler breaking down, the bloodshed in Israel? What if our income suddenly rises or drops?

Of course our plan would change.

But what about the less obvious “intrusions”? Might we be so moved by a hurricane disaster or the work of a innovative new local

non-Jewish anti-poverty association that our giving plan would change?

Will our hearts dictate to our giving hands? What will inspire our hearts? Will we listen to Chazzan Lyon's potato famine appeal—"Humanity"? Or will we say "Enough is enough; limited resources must be applied to the most needy, local, Jewish cause"?

It all depends on how we have been taught to interpret the words of Hillel—"If I am not for myself, who will be for me? But if I am only for myself, who am I? If not now, when?"²⁸

We have no dearth of good teachers to help us interpret Hillel—they have to begin teaching, and we have to begin listening. Our giving hearts will decide the rest.

CONCLUSION

Our experience as detailed in this paper is that Orthodox philanthropy has a great deal in common with general philanthropy. Many of our personal motivations for giving are similar to those of other Jews and of non-Jews. We could also do better. We can give more. We can be more discriminating and ask tougher questions of our recipient organizations—and this would result in a greater return on our philanthropic investment and increase the size of the charitable pot. Introspection will help change insular attitudes that are harmful (e.g., the sense that a school's support is only the responsibility of its current parent body—and not the broader community).

By and large, however, our past giving patterns—amounts, processes, openness, and overarching attitudes passed on to our children—remain a noble chapter in our history. In the face of perhaps the most expensive lifestyle governed by strict religious obligation, we seek few excuses to avoid giving. We need not beat our breasts too hard nor allow ourselves to be bullied by those who would heap scorn on us. We certainly have a lot to learn and can do better—but above all we have a lot to be proud of and some wonderful lessons to teach.

NOTES

The title of this paper comes from Leviticus 23:22. For recommending the title and for extensive content advice and editing, we thank our son, Moshe Shai Davis, Jerusalem, Israel.

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