Volume 88, 1/2
Winter/Spring 2013

A Periodical of Professional Trends and Developments

Journal of Jewish Communal Service



Big Ideas. Bold Solutions.

Despite diminishing interest and affiliation, there has been, over the past decade, a simultaneous burst of innovation manifesting itself in creative communities, organizations, and programs that reflect what many consider a renaissance in Jewish life. These initiatives are often driven by young people and characterized by a language that not only entices but also inspires and empowers them.

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Re-envisioning Aging through Asset Building and Collaboration
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Jewish Communal Service Association
JCSA
Connecting & Enhancing Professional Leadership

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A Periodical of Professional Trends and Developments

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The *Journal of Jewish Communal Service* invites submission of articles on practice, theoretical principles or research in Jewish communal service, the general field and any of its component divisions, or in related fields of practice and knowledge.

All articles submitted to the *Journal* must be sent via email as a Word Document, double spaced and, optimally, 3500–5000 words in length. The *Journal* accepts original articles, which become the intellectual property of the *Journal of Jewish Communal Service*.

The *Journal* uses the American Psychological Association reference style. All the works cited in the text are listed at the end of the article. References in the text are cited by the name-date system in which the author and date are enclosed in parentheses at the end of the sentence in which the work is cited. This style eliminates the need for reference footnotes within the text itself.

Every manuscript is given careful consideration by the editor and is submitted for a blind peer review, with the author's name masked. Therefore, a significant amount of time may elapse between an article's submission and notification to the author of the editorial decision that has been reached. Articles may be submitted to the Managing Editor at info@jcsana.org.

Published articles may express opinions that do not reflect the official position of the Jewish Communal Service Association of North America or the views of its membership. Members of the Publications Committee are acting in their personal capacities and their opinions do not necessarily reflect the views of their employers. Being a forum of opinion, the *Journal* also accepts letters and reviews from readers for publication.

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For wisdom is better than rubies; and all the things that may be desired are not to be compared to it. *Proverbs 8:11*

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for their leadership in promoting creativity in the Jewish community.





Letter from JCSA

This issue of the *Journal* is based on the JCSA's Annual Conference held in Baltimore in June 2012 on the theme, "Big Ideas, Bold Solutions."

Not wanting to limit the content of this issue to what transpired at the conference, we widely circulated a request for abstracts for papers that would present writers' ideas about "big ideas and bold solutions." In reviewing all the abstracts we noticed a pattern. Prospective authors offered interesting ideas. Many of them were about promising projects they had initiated or were responses to emerging trends; others argued for some new approach to an identified problem. A few imagined a new future and addressed it with provocative thinking.

Since the submissions presumably represent Jewish communal professionals' current thinking, they gave us much to consider in terms of colleagues' assumptions about current and future conditions. This led us to the question: How do today's Jewish communal professionals think about big and bold ideas? Here are a few hunches.

With the demands of today's work environment, with its constricted funds (and staff) and broadened agendas, there is precious little energy to devote to an unfettered consideration of the bold and the big. Doing this requires time to "get on the balcony" (a phrase popularized by Ron Heifitz, the prominent professor at Harvard University's Kennedy School in his book *Leadership Without Easy Answers*) to see what's happening on the dance floor below—to discern patterns that elude us when we are involved in the dance. When and how do professionals have opportunities for such reflection? Are there occasions to look beyond the pressures of today to consider alternate tomorrows? Perhaps preparing their abstracts provided an occasion for the writers to do that kind of thinking.

We also wondered whether using the word "solutions" in the call for papers immediately evoked programmatic responses. "Solutions" assumes the presence of a problem that can be "solved," whereas "bold ideas" might be decoupled from problem solving. The "bold idea" of Zionism, for example, addressed many problems faced by diaspora Jews in the 19th century, but it also emerged from dreams of what could be that related to different historical realities and prevalent ideologies. Had we asked for bold ideas without referring to "solutions," might we have seen ideas that were less bound by the problems that writers grapple with in their current work?

The submissions also caused us to think about how we are all affected by the pace of change and the concomitant sense that planning frameworks have to shrink. Several decades ago, "long-range planning" assumed a sufficiently stable environment so that one could make predictions, priorities, and strategies for the next eight to ten years. Today, strategic plans relate to as few as three years, sometimes to five. It is too hard, perhaps impossible, for most of us to think in bigger terms. As the pundits each new year remind us, futurists almost invariably make erroneous predictions. If that is the case, it is smart to avoid long-term predictions. But is that wise? Can we balance the bold and possibly audacious with the exciting and probably viable?

So in this issue you will find articles that take the balcony view, and then try to interpret what is seen from that perspective, as well as articles that propose solutions for old problems or describe new ones. We applaud all of our colleagues

who submitted their ideas for consideration, for it is through public consideration and discourse that we will advance our work and communities.

As you read the authors' ideas consider each writer's assumptions:

- Do they assume that the basic contour of Jewish life and Jewish identity is in flux? If so, how? How do their ideas address the changes that they see?
- What do they posit about the interaction of what is happening in the Jewish world with wider societal trends?
- What issues do they think it is most important for the Jewish community to attend to—and why?
- Are the ideas presented big and bold?
- Do the authors' analyses convince you that the ideas they offer will make a significant difference to people and the community?

We want to thank the generosity of The Associated: Jewish Community Federation of Baltimore, which provided underwriting for this issue and helped conceptualize the topic for our Annual Conference and this issue of the *Journal*. As we were working on this issue, the Jim Joseph Foundation posted their *Madrichim* papers online, and we are pleased to have their support in including their publication in these pages. They enrich and broaden the communal conversation as private foundations continue to play a prominent role in our community's future.

We expect that each reader will be provoked by this issue. Some of the ideas expressed by the authors may anger you; others may reassure you. They may stimulate you to rethink some of your own assumptions and move in new directions. We hope that they will cause you to ponder what is—and what should be. In the end, if some of the articles motivate you to get on the balcony to try to discern larger patterns and then return to your dance with new insights, this issue will have been a success.

Please share your reactions to the ideas explored in the articles with us and other readers. Email us with your comments at info@jcsana.org.

We thank members of our Publications Committee, co-chaired by Lyn Light Geller, for their thoughtful review of abstracts and articles, as well as acknowledge the considerable contributions of our Managing Editor, Gail Naron Chalew, who deftly edits this *Journal*, and the leadership of Brenda Gevertz, JCSA Executive Director.

Susan L. Shevitz, Ed.D.
Co-Chair, JCSANA Publications Committee

Toward Transparency

An Analysis of the 2012 Jewish Communal Professional Compensation Survey

Mordecai ***Walfish****, Avi* ***Herring****, Justin Rosen* ***Smolen****,*
Tamar ***Snyder****, Ruthie* ***Warshenbrot****, and Naomi Korb* ***Weiss***

As young professionals working in the Jewish communal sector, we entered the field with a certain degree of idealism; we chose this field because of the intrinsic benefits of working for causes in which we deeply believed. Although we knew it would not be perfect, we expected that this field would reflect our values and the ethical teachings imbued in our Jewish tradition. Early in our careers, we became privy to an ongoing conversation in the field about disparities in pay across genders, salary stagnation among mid-level professionals, and a lack of transparency regarding compensation in the sector as a whole.

As professionals who take pride in our work and our community, these concerns were disconcerting. Yet despite the impassioned conversation they spurred, there were little data to back up the anecdotes. To address this void, in the spring of 2012 we launched a compensation survey of the field. Inspired by the *Forward*'s annual salary survey of executives of Jewish communal organizations, this survey was an attempt to gather similar data about employees at several rungs of the Jewish professional ladder. The goal of this exploratory effort was twofold: to bring to light compensation trends in the Jewish communal sector and to model and advocate for increased transparency in how Jewish communal professionals are compensated.

This article presents and analyzes the key findings of this survey, which received more than 1,600 responses. The analysis highlights differences in how salaries are distributed across organizational lines, level of education, and gender. It also compares trends that emerged from the data with studies of the Jewish nonprofit sector by Cohen (2010) and Kelner et al. (2005), as well as research on the general nonprofit sector. These latter comparisons provide a window into how we fare in terms of compensation, which has significant implications for the Jewish communal sector's ability to recruit and retain top talent equipped to meet the needs of tomorrow.

A REVIEW OF THE LITERATURE

A Dearth of Data

There have only been two recent attempts to survey the compensation patterns of the field: Shaul Kelner et al. (2005) analyzed data from more than 1,400 employees of Jewish communal organizations across six communities in the United States, and in 2010, Steven M. Cohen and the Jewish Communal Service Association (JCSA) produced the study, "Profiling the Professionals: Who's Serving

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Our Communities?" Additionally, subsectors of the Jewish communal field (e.g., the JCC Association and the Central Conference of American Rabbis) have studied their own employment and compensation trends.

Pay Gap—Executives Versus the Rest

A key trend in the nonprofit sector is the significant pay gap that exists between executives and middle-management and entry-level staff. Young (1987) attributed this gap to the competitive market for high-performing executives, which dictates that organizations offer attractive salaries to retain them, while compensating the remaining employees at lower levels than their for-profit counterparts. Mesch and Rooney (2008) noted that salaries for nonprofit CEOs rose at twice the rate of inflation in 2003 and more than doubled for nonprofit CEOs at the largest nonprofits between 1997 and 2003. In Cohen's 2010 study, CEOs in Jewish nonprofits earned, on average, $125,000, in contrast to entry-level professionals who earned $45,000.

Pay Gap—Gender

There is no study of professionals—nonprofit or corporate, in the Jewish community or beyond—that does not draw a relationship between gender and salary. In almost all cases, there is a gap between men's and women's wages. The American Association of University Women (2009) defines the pay gap as "the difference in men's and women's typical earnings, usually reported as either the earnings ratio between men and women or as an actual pay gap." Although the discrepancy is most pronounced at the executive level, pay discrimination is evident at all levels in the Jewish communal sector when controlling for other variables such as years of experience, education, and organizational size. Mesch and Rooney (2008) cited previous research that found a pay gap of up to 50% for men and women in comparable executive jobs in the nonprofit sector. Overall in the United States in 2011, women working full-time earned 77 cents for every dollar a man earned, or approximately $11,000 less than men annually (AAUW, 2009).

Pay discrimination is evident at all levels in the Jewish communal sector when controlling for other variables such as years of experience, education, and organizational size.

In the Jewish communal sector, the underrepresentation of women in leadership positions further complicates the gender pay gap. For the past four decades, studies of Jewish communal professionals have consistently found that women lag behind men in salary and are underrepresented in the leadership ranks in Jewish organizations. In 1975, the National Conference of Jewish Communal Service (today's JCSA) conducted a survey of its affiliate organizations and uncovered salary differentials between men and women and an underrepresentation of women in top posts in each of the seven fields represented (Feinstein, 1975). A follow-up survey in 1981 by the same organization made a similar diagnosis. In 1987, the Commission on Professional Personnel at the Council of Jewish Federations (today's Jewish Federations of North America) discovered that female federation executives received lower salaries than their male counterparts (Quint, 1995). An American Jewish Committee study in 1994 also found women clustered at the lower end of the salary scale (Isserman & Hostein, 1994). In 2001, a study of JCC personnel found that 3% of female JCC professionals earned more than $100,000, in contrast to 20% of all JCC professionals (Cohen & Schor, 2001).

Since 2009, the national weekly newspaper, the *Jewish Forward*, has conducted an annual salary survey of senior executives of major Jewish organizations,

which has consistently found that women are paid much less than men; the most recent data found that a woman is paid 62.5 cents for every dollar a man makes (Eisner & Efrem, 2011). Describing the "net cost of being a woman in Jewish communal life," Cohen (2010) reported that women in Jewish communal service make $20,000 less than men when holding constant age, years in the field, level of responsibility, hours worked, and degrees earned.

SURVEY METHODOLOGY

The 2012 Jewish Communal Professional Compensation Survey (JCPCS) was a grassroots effort, undertaken by a team of young professionals in the Jewish community and supported by advisors who are experts in the field of survey design and data collection in the Jewish communal context. The survey questions were a mix of open-ended, multiple-choice, drop-down, and check-off formats, designed to capture the most accurate and usable data.

The survey was created using Google Docs, an open-source platform whose front end is public and whose back end is limited to administrators. Results were anonymous, though respondents were able to submit their names and emails through a separate form to receive results of the survey.

The survey went live in June 2012 and remained open for three weeks. It was advertised through various newsletters, Listservs, and social media and garnered 1,717 submissions. Following data clean-up, the total usable number of entries stood at 1,651.

It is important to note that this survey, like Cohen's 2010 study, used a nonprobability sample. Because there was no defined population or sampling frame, we do not make claims that this sample is representative of the population at large. However, in this article we do compare our findings to Cohen's study and comment on what is consistent and what differs. His survey gathered 2,435 eligible responses (nearly one and a half times the number of respondents to this survey).

SURVEY FINDINGS

In our findings, we present both descriptive statistics (crosstabs) and inferential statistics (regression).[1]

Clearly our survey skewed to younger professionals.

Age

Of the 1,651 people who completed the JCPCS, 48.7% were under the age of 32. An additional 15% were between the ages of 33 and 42. Nearly 19% of respondents were between the ages of 43 and 57. Only 6.5% were between the ages of 58–67, and less than 1% of respondents were between the ages of 68 and 77.

According to Cohen (2010), the distribution of age in the Jewish communal sector is from low 20s through age 64, and drops off after age 65. The median age is 48. Clearly our survey skewed to younger professionals.

The higher response rate from younger professionals is most likely because the survey was distributed via social media channels and without any "formal" endorsement or organizational affiliations. It is unlikely that our survey accurately

[1]We computed regressions using ordinary least squares (OLS). The highest R^2 value is .61. For the regressions, we can only say that these relationships are true for our sample, not for the entire population. We also do not use significance tests because they are not appropriate for nonprobability samples.

presents the age of most Jewish communal professionals, but it may be noteworthy that young professionals were eager to provide this information.

Gender

Female respondents outnumbered males nearly three to one. This aligns with the gender distribution identified in previous studies that have found that women comprise between two-thirds (Cohen, 2010) to three-quarters (Eisner & Efrem, 2011) of Jewish communal professionals.

Geography

The majority of survey respondents (31%) worked in New York City. Other cities with high response rates include Washington, DC (nearly 9%) and Boston, Los Angeles, and Chicago (all at 5%). It is noteworthy that 19% of respondents were dispersed throughout smaller cities in North America, with less than 3% of respondents working in Canada. With the exception of New York, where compensation is significantly higher, there was no significant variance in compensation city-to-city controlling for relevant factors.

Salary

The average salary of survey respondents was $66,044, with a median of $56,000. Twenty-five percent of respondents earned less than $40,000, whereas 25% earned more than $82,000. The top 1% earned $200,000 or more (see Figure 1).

The average salary of executive directors and CEOs in organizations with budgets between $500,000–$1,000,000 was $105,658. Comparable figures were $118,178 for those with budgets between $1–5 million; $177,416.20 for budgets between $5–10 million, and $185,517.70 for budgets between $10–25



Figure 1. Salary by position in the organization.

million. The average salary for the top professionals in organizations with budgets in excess of $50 million was $131,550, which goes against the correlation between executive pay and organizational budget that is a standard in nonprofit salary surveys. However, we speculate that the low salary figure for this bracket is skewed by the very low number of respondents in this category. Assuming an average rate of inflation of 3.24% per year (inflationdata.com), the salaries of top executives in Jewish organizations are well above average for the nonprofit sector.

Organizational Budget Size

More than 30% of respondents said they work for an organization with a budget between $1 million and $5 million. Almost 10% of respondents said that the organization they work for has a budget between $200,000 and $500,000, and another 10% worked for organizations with budget ranging from $500,000 to $1 million. Nearly 30% of respondents worked for organizations with budgets above $5 million. A small percentage (6%) worked for organizations with budgets under $200,000. It is noteworthy that a significant percentage (16%) of respondents did not know the budget of their organizations.

Marital Status

More than half (57%) of respondents were married, and 35% were single. About 7% said that they were living with a significant other. Those who were single had a median income of $45,000, whereas those living with a significant other reported a median income of nearly $50,000. Married respondents reported the highest median income ($66,000). However, when we controlled for related personal and organizational characteristics, marital status had no impact on salary.

Dependents

More than half (55%) of respondents reported that they do not have any dependents, nearly 14% cared for one dependent, and 20% cared for two dependents. About 10% reported between three and four dependents, and less than 1% reported five or more dependents. Median salary increased as the number of dependents increased. Respondents with one dependent earned a median income that was $19,000 higher than those without dependents. Median income stayed about the same for those with two to four dependents (about $72,000).

Years of Experience and Education

Among those who filled out the survey, the average number of total years of experience was 12 (with a maximum of 46 years, in one case). Respondents exhibited a high level of education. Nearly 50% of respondents had a master's degree (approximately the same amount as those surveyed by Cohen 2010) and another 16% had a PhD or rabbinical degree or graduated from medical or law school. Those with a master's degree earned, on average, $16,000 more than those whose highest level of education was a BA ($68,000 versus $52,000, respectively). The highest median salary of $85,000 belonged to those holding a doctorate, medical, law, or rabbinical degree (see Figure 2).

In his 2010 study, Cohen found that those with advanced degrees earned $25,000 more than those with only a BA—far more than the $16,000 differential that our survey found. When we further control for a variety of other characteristics

associated with salary (age, gender, years of experience, etc.), we found that a master's degree adds an additional $4,252 to an employee's average salary (compared with a BA), whereas a PhD, rabbinical ordination, or other terminal degree adds $13,709 (compared with a BA).

Salary Negotiation

Respondents were split almost in half in terms of whether they negotiated their salary: 49% did and 51% did not. Men were slightly more likely to have negotiated their salary. Among younger employees aged 23–37, the gap narrowed slightly—51% of men in this age group negotiated their salary, compared with 49% of women. Those who negotiated had an average salary of $73,966, whereas those who did not negotiate had a salary of $58,340. There are only limited data with which to compare this finding from other studies.

Gender Wage Gap

The wage gap among males and females was evident in every age cohort of survey respondents (see Figure 3). On average, male respondents earned $83,388, whereas female respondents earned $59,654. The wage gap was highest among those aged 53–62, with females earning, on average, nearly $57,000 less. Although the wage gap was smaller among young professionals, it was still notable. Among professionals aged 23–37, men earned $10,134 more than women. This comparison does not control for other factors, and there are several possible interpretations for this finding. It is possible that these younger professionals truly represent a different "cohort" and that, as they gain more experience, the overall gender pay gap could narrow. However, it is also possible that this narrowed gap is a "lifecycle" phenomenon—when these younger professionals advance in their careers, they will begin to exhibit the same large gender pay gap as currently exists. If this gender gap remains as large, it may be due to the vestiges of gender discrimination still alive in this sector and/or because women often dial back their careers as they devote more time to raising a family (a result of inflexible workplaces, among other factors).[2]

The survey results also revealed that men greatly outnumber women in executive-level positions. Although men made up 27% of all respondents, they

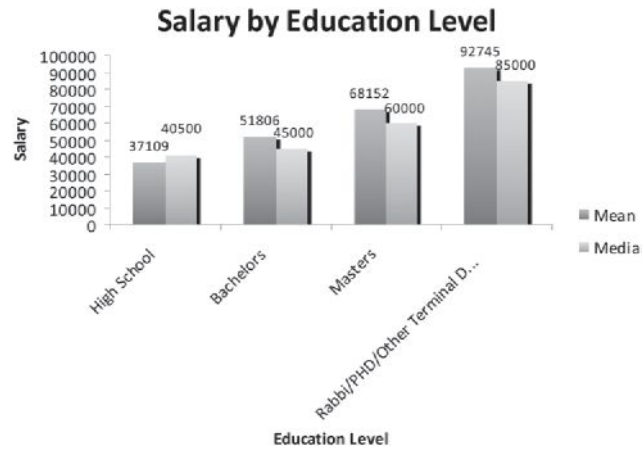

Figure 2. Salary by educational level.

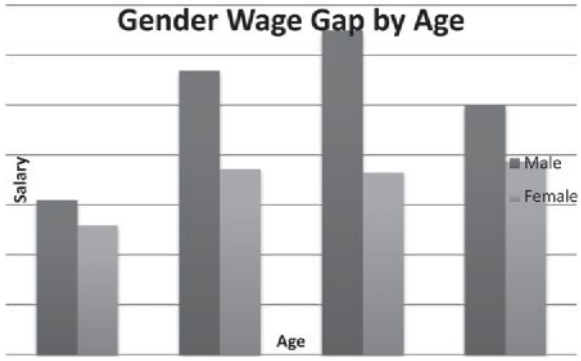

Figure 3. Gender wage gap by age.

were 45% of all CEOs and 39% of all COOs/assistant directors. Without controlling for other variables, this survey found that women CEOs make 72 cents for every dollar earned by men. The *Forward*'s annual salary survey—a major impetus for this study—found that women CEOs earn 62.5 cents for every dollar earned by men (Eisner & Efrem, 2011).

It is important to recognize that male and female respondents differed in ways other than salary received. For example, on average, men tended to report working more hours than women. Whereas 31% of female respondents reported working greater than 40 hours/week, 46% of men did so. Men and women also differed in educational attainment. Thirty-one percent of men held a terminal degree (rabbinic ordination, PhD, JD, etc.), in comparison to only 10% of women. Although more women than men had master's degrees (53–37%), terminal degrees have a much larger impact on salaries than a master's degree.

Both hours worked per week and educational attainment are associated with higher salaries.

Both hours worked per week and educational attainment are associated with higher salaries. As a result, when comparing the salaries of male and female respondents, it is necessary to control for other variables that affect salary. We did this using a statistical technique called multiple regression, which seeks to isolate the impact of gender on salary while holding other variables constant.[3] When we held a number of important organizational characteristics (organization size, seniority, position in organization, location of organization, hours worked, etc.) and personal characteristics (age, level of education, etc.) constant, we found that men still "out-earn" women by $8,681.

Because we cannot use our nonprobability sample to generalize these findings to all Jewish communal professionals, this finding (and indeed all of the findings discussed here) must be treated with caution. The wage gap discovered in our study was much smaller than in Cohen's 2010 study, which found a $20,000 discrepancy after controlling for other variables. It is difficult to know which estimate more accurately reflects the gender pay gap, but at the very least, we can hypothesize that the gap exists and is significant. Even if the pay gap is currently closer to our finding ($8,681), over a 40-year career, men would earn more than $350,000 more than women, controlling for all other variables.

[2]In this vein, our data found that men with dependents working full-time (35-40 hours+) make $107,030, whereas women with dependents working full-time (35-40 hours+) make $78,595.

[3]We controlled for organization size, hours/week worked, position in organization, direct reports, region, type of organization (e.g., federation, social justice organization, etc), age, family characteristics, level of education, years of work experience, and gender.

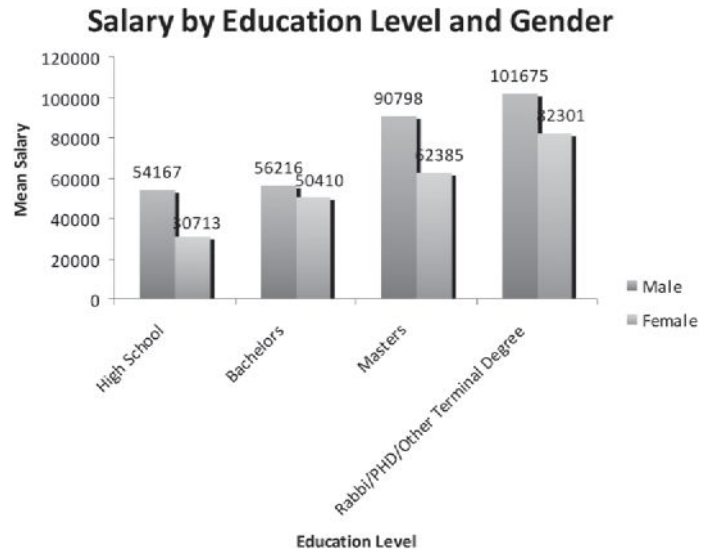

Figure 4. Salary by educational level and gender.

CONCLUSION AND RECOMMENDATIONS

Although the results of the 2012 JCPCS Survey may not have been surprising—particularly as they relate to the pay gap between executives and entry-level staff and between male and female professionals—the findings do bring to light several trends that may impair the Jewish communal sector's ability to attract and retain the talent that is necessary to lead the Jewish community in the 21st century.

After analyzing the survey data, we recommend the following actions:

- **Increase transparency regarding compensation levels and develop field-wide compensation standards**. In the corporate world, many companies provide employees with a salary range for each position, which includes an adjustment according to geographic location. Employees are also given the opportunity to earn a bonus (up to a stated percentage), along with a transparent overview of the factors that go into calculating that bonus. Such practices are helpful in opening the "black box" of compensation information. In fact, many Jewish communal professionals reported difficulty and frustration in acquiring relevant compensation metrics. We recommend that more research be conducted into how other nonprofit organizations and private firms structure their pay scales in a way that provides a measure of transparency and consistency to employees. We strongly believe that this type of transparency will benefit both employees *and* employers.
- **Institute written workplace flexibility arrangements at Jewish communal organizations**. Both men and women could benefit from a shift in workplace culture in which employees are measured primarily according to performance as opposed to face-time. The nearly $30,000 salary discrepancy between men and women with dependents reflects, in part, decisions women are making to reduce the number of hours worked per week in a workplace culture that seems to force Jewish communal professionals to choose between prioritizing a top-level career and raising a family. Flexibility could allow both men and women, with dependents or without, to live a full life in which work does not necessarily need to be completed during regular office hours.

- **Address the compensation gaps.** For nearly 40 years, researchers and practitioners have raised concerns regarding similar trends borne out in our data. As a sector, we need to take action to address these disparities that have existed for too long. We recommend convening a task force to confront these issues. To be effective, this task force would include representation from organizations across the field and would reflect the diversity of the Jewish professional workforce.

It is our belief that if we as the Jewish community take seriously the values we propose, then we must strive to fashion our professional workplaces accordingly.

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The $54,000 Strategy: A Bold Solution to Undervaluing our Jewish Professionals

Mark S. ***Young***

What if entry-level Jewish communal professionals earned $54,000 plus attractive health benefits, and received effective managerial guidance and visible opportunities for career growth? What if starting middle managers earned $108,000, plus meaningful opportunities to improve their professional, managerial, and leadership skill sets? What if?

If that came to pass, the field of Jewish communal service would easily attract and retain the best and brightest, and employers could then select and retain the most intelligent, creative, and productive professionals available. If these best and brightest were providing services and undertaking leadership roles, our institutions and shared future would have an an even stronger likelihood of long-term success.

MAKING THE CASE

The Jewish community is at a crossroads regarding the recruitment and retention of its professionals. Many exceptionally talented individuals whose hearts desire to serve the Jewish community professionally are choosing for-profit jobs or better compensated nonprofit positions, in order to survive and feel secure financially. Many other talented individuals dedicate their time, energy, and creativity to our important work in spite of sub-par compensation, supervision, and professional development, relative to other career paths.

In addition, we in the Jewish community send mixed messages regarding what we value from emerging adults. To excite and engage the next generations we pour enormous resources into day schools, Jewish camps, and programs such as Birthright Israel. We also provide substantial financial resources to top-notch graduate programs and scholarships to those preparing for Jewish professional careers—enabling individuals to pursue credentials without incurring mountains of debt. Yet, when graduates of these programs go to work for Jewish communal organizations they are frequently underpaid, poorly managed, and rarely provided *meaningful* career growth opportunities. Why does the *valuing* stop?

We in the Jewish community send mixed messages regarding what we value from emerging adults.

Finally, it is rare that we can identify Jewish organizations that effectively and with intentionality manage their talent by providing their employees with ongoing professional development to support career growth or offer substantive performance evaluations connected to compensation increases and promotions. This absence occurs partly because many senior professionals were never formally trained in management, evaluation, or supervision. Many practitioners are placed in management roles with no real guidance. Consequently, subordinates and organizations suffer, experiencing lower job satisfaction and higher turnover.

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THE $54,000 STRATEGY

Jewish organizations ought to be "employers of choice," inviting all talented professionals in our field as "the best place to work and where you will feel strongly valued." Therefore, I propose a big idea and bold solution: Compensate talented individuals pursuing careers in Jewish professional life well, *really well,* monetarily and otherwise. Do not force talented people to choose between earning respectable money and receiving strong career support vs. realizing their passion for service to the Jewish community. Why cannot they have both? It should be our collective priority that Jewish professionals feel *valued, appreciated, and nurtured* to excel and thus be encouraged to use their talents in the field of Jewish communal service. Implementing four strategies will help us accomplish this goal.

Set Higher Salary Levels With Increases Based on Performance

The symbolic salary figure of $54,000 demonstrates the value the community should place on the work employees will undertake. It is significantly higher then the $20K-$30K salary range of many entry-level professional positions. This or other significantly higher salary levels will have an immediate impact on our talent pool, attracting increasingly strong, creative, and well-prepared candidates. If it also becomes clear that promotion and pay increases are based on performance, with clear job descriptions and thoughtful performance evaluation programs administered by trained managers, young professionals will be increasingly motivated to stay and eager to pursue positions of progressively more responsible work.

How can we pay for these high starting salaries? Consider the cost of employee turnover. The lost time, advertising dollars spent to recruit a successor, and repeated training result in less productivity and higher expenses. Turnover costs, which can be up to 25-30% of a person's salary, could be paid to your talented employee instead! The increased motivation of staff who receive higher salaries can also lead to increased productivity and stronger products and services, which may ultimately generate more revenue from consumers of fee-for-service programs, higher donations, and stronger grant applications and awards.

Do not force talented people to choose between earning respectable money and receiving strong career support vs. realizing their passion for service to the Jewish community.

Train Supervisors to Be Effective Managers

Each Jewish communal institution should require supervisors to complete management training programs that cover motivation and recognition strategies and how to properly evaluate performance and provide constructive feedback; these elements of supervision maximize the value of what should be weekly (yes, weekly!) meetings with subordinates. The old adage holds true: *People stay (or leave) because of their bosses more often than because of their role or the organization*. Supervisors should be a reason to stay, not leave.

Providing this management training will be expensive, but slashing training budgets feels contrary to a Jewish community that values learning. This training can also be an opportunity for institutional collaboration. Organizations can pool resources to deliver joint training programs, saving funds and increasing cooperation. The local JCC or Federation is an optimal place to stimulate these collaborations.

Demonstrate Value by Compensating Beyond the Dollar

If Jews value education and ongoing learning, then professional development should be a staple of all employees' job experience. Require all employees to attend seminars or courses to improve professional skill sets on a quarterly or bimonthly basis (at no cost to the employee!), demonstrating that we value their professional growth and development of their talents. This will increase current performance and yield a noticeable return on investment.

Compensate Managers So That They Choose to Stay Long Term

Many industries (particularly for-profits) provide substantial increases in salary and/or bonuses to mid-managers, mostly based on performance and their assumption of progressively greater responsibilities. We should not try to match for-profit salaries. Jewish organizations as non-profits have limited revenue streams. However, we should commit to salary levels that motivate mid-level managers to remain in the field.

How do we pay for salaries that are much higher than current salary scales? We hire only when necessary and provide ongoing training and support that increase job satisfaction. This will greatly reduce turnover costs. In addition, hiring and keeping the best talent – attracted by these smart compensation strategies – will yield stronger productivity and will likely also increase revenue, as argued earlier.

COMMENCING A CONVERSATION

I imagine this article will generate dissent and controversy. That is the point. I hope that this begins a larger conversation among the leaders of Jewish organizations. In an economy yet to be fully re-energized, increasing salaries, adding training programs, and implementing new managerial systems may be currently out of reach, but we cannot put off these strategies indefinitely. Valuing our Jewish professionals in significant and meaningful ways, just as we value our Jewish youth engagement and graduate programs, is essential and will make a significant positive impact on our community. It is also the strategically sound and morally right thing to do.

Incorporating Sustainability Into Jewish Communal Organizations Through Dedicated Staff

Aleeza ***Oshry***

Sustainability (noun): withstanding, maintaining, providing necessities for, keeping/affirming the vitality and justice of.

The American Heritage® Dictionary of the English Language

Sustainability is a word that can be applied to almost every aspect of our lives. Google "sustainability" and you will get 125,000,000 hits in 0.25 seconds. It is used in multiple contexts such as sustainable government, sustainable job growth, sustainable energy, and sustainable development. Everyone seems to be concerned with making whatever they do sustainable. After all, who would purposefully want to be **un**sustainable? Yet sustainability is not just a catch phrase; it is the principle that "everything we need for our survival and well-being depends, either directly or indirectly, on our natural environment" (EPA, n.d.). Sustainability functions as the means by which the basic tenets of society—social and economic—coexist harmoniously within the natural world for future generations.

What has happened in human history that has made the way we live so unsustainable that we need a whole discipline to address it? A life of fast progress and modernity has led to overconsumption and not enough stop checks to assess these questions: How long can we sustain our operations (or lifestyle) in this fashion? What are the consequences to our actions? What is the impact we are having on the world around us? Are our dollars being wisely spent and invested? Dire economic projections and environmental calamities brought about by continuing along our present path have focused attention on the need for a sustainability focus, and opportunities are opening up in related fields of construction, energy, finance, education, conservation, and management. Slowly businesses, municipalities, and governments are working to stem negative impacts on unsustainability and to implement policies to increase public awareness and program effectiveness. It is time that the nonprofit sector—especially the Jewish communal service sector—follow suit.

WHAT IS JEWISH ABOUT SUSTAINABILITY?

Protecting and preserving the environment is a value deeply rooted in Jewish texts and traditions. Our calendar and holidays track the cycles of nature. Our holy books bid us to preserve and protect G-d's creations. Jewish law teaches us to avoid destruction and waste of natural and human-made resources. The Talmud greatly expands on the biblical prohibition of *baal tashchit,* forbidding the

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destruction of fruit trees with an ax during wartime, to include other objects and methods of destruction—the rationale for this principle being that, if it is to be applied during the difficulties of a wartime situation, then how much more so should it apply during other times.

The anonymous work *Sefer Ha-Chinuch*, based on the writings of the famous 12th-century rabbi and Torah scholar Maimonides, describes the mitzvah of *baal tashchit* as "the way of the righteous and those who improve society," of those who oppose all destruction and waste. Likewise, a prominent Orthodox leader of 19th-century Germany, Rabbi Hirsch, saw *baal tashchit as* the most basic Jewish principle of all, because it is an acknowledgment that the world is created by G-d and that its elements are lent to people to use wisely (COEJL, 2006).

Indeed, Rabbi Hirsh seems to be echoing the message taken from the Midrash Ecclesiastes Rabbah. While leading the first humans around the garden after their creation, G-d says to them, "See My works, how beautiful and excellent they are! For your sake I created them all. See to it that you do not spoil and destroy My world; for if you do, there will be no one else to repair it" (Ecclesiastes 7:13). Solutions to our current environmental dilemmas reflect our biblical teachings and frame the context for the Jewish value of *tikkun olam*, repairing the world. Our protection of the environment must be a priority of and a shared responsibility within our community and be reflected in our operational practices and behaviors.

Alignment of these Jewish environmental tenets with high standards of organizational operations and behaviors is the very essence of sustainability best practices. These best practices are modeled after the sustainability "triple bottom line": ecologically sound, socially just, and economically viable (Speer, 2012). Not only do these modern concepts around sustainability echo the Jewish value of preserving the earth for future generations but they also serve to increase the long-term profitability and viability of our Jewish community and communal services, thereby enhancing communal organizational missions.

Alignment of these Jewish environmental tenets with high standards of organizational operations and behaviors is the very essence of sustainability best practices.

Jewish communal work is naturally geared toward imbuing social responsibility not just within the services provided for our communities but also within their very operations. To effectively do so, there needs to be a purposeful and strategic plan to incorporate mission-driven, environmentally conscious practices within our Jewish nonprofit organizations. It behooves our Jewish organizations to address and integrate sustainable best practices as a way to embody Jewish values and their alignment with communal service operations. Dedicated staff are required to manage and direct the integration of applicable and feasible sustainable opportunities.

ACHIEVING SUSTAINABILITY THROUGH DEDICATED STAFF IN THE CORPORATE WORLD

The corporate world is motivated to achieve sustainability to save money, respond to pressures from consumers, and to do the "right thing." As tracked by the environmental analysis firm Verdantix, an increase in the number of executive-level sustainability positions is directly correlated to operational improvement by decreasing environmental impact and business risks. Additionally, a recent survey found that 68% of consumers are becoming more energy and environmentally conscious and are actively taking measures to reduce their own energy

consumption; they expect that the businesses they work in and the organizations they support to be doing the same. Although most companies cite cost savings as the impetus for adopting more environmentally sound operations practices, 53% of the companies surveyed created sustainability best practices because it was "the right thing to do" (SustainableBusiness.com, 2011). Ultimately, these efforts are anticipated to bring about system-wide savings that can be redirected to enhance programs and community services.

An article in the September 2011 issue of *CFO Magazine* states that despite a slumping economy, nearly 70% of businesses anticipate spending even more on sustainability initiatives this year. Contrary to the stereotype that people who embrace sustainability are "tree-huggers" or "die-hard" environmentalists, executives are not forgoing profits in favor of environmental initiatives; the majority report that their sustainability actions and decisions actually increased profits (O'Sullivan, 2011). Sustainability initiatives have been shown to create an influx of resources and a venue to share best management practices that improve company outcomes.

Yet according to a study published by TRIRIGA, an IBM subsidiary, of the 92% of organizations that have established environmental sustainability policies and goals, barely one-third have bridged the "sustainability chasm" and achieved their sustainability objectives. The study identifies what separates the "achievers," those companies that have successfully established environmental policies and goals, from the "planners" and "stragglers," which have yet to do so: the ability to integrate sustainability throughout the organization. To successfully bridge this "sustainability chasm," executive management must be involved and organization-wide internal teams must be used to evaluate and implement sustainability strategies. Additionally, sustainability, especially related to energy efficiency, needs to be ranked as a top priority and have dedicated budgets to support its initiatives (IBM Corporation, 2011).

MIT's *Sloan Management Review* identifies these successful organizations as "harvesters"—those that embrace sustainable activities that directly result in operational benefits. These organizations have changed their business model to one that distinctively supports sustainability rather than attempting to impose sustainability into a preexisting structure. A key component in this design shift is clearly articulating that the responsibility for sustainable initiatives is not marginalized to the sustainability manager alone, but rather is a collective process with support from CEOs and cross-functional senior management who all support the objectives of the sustainability plan. This collaborative approach with internal stakeholders often leads to successful collaboration and networking both inside and outside the organization (MIT, 2012).

Sustainability initiatives have been shown to create an influx of resources and a venue to share best management practices that improve company outcomes.

Over time, sustainable business practices become standard best management practices. They address long-term profitability and vision by establishing procedures for routine evaluation and benchmarking to assess operations and behaviors. The focus on sustainability can not only save money but also have a positive impact on our environment.

PUTTING THEORY INTO PRACTICE: ACHIEVING SUSTAINABILITY THROUGH DEDICATED STAFF IN JEWISH NONPROFITS

Being attuned toward social trends is particularly important in the Jewish nonprofit world, because our organizations are lay-led and attracting a healthy donor

base is essential to continue providing services. In a customer opinion study published by the Nielson Company in 2011, 83% felt that it was important for companies to have an environmental program (MIT, 2011). Through a focus on sustainability, Jewish organizations can excite and inspire their donor base as well as identify other potential stewards through a hallmark of responsible and sustainable practices. It can transform the way the public thinks about charity, about giving, and about how change gets made. Sustainable operations also can attract additional sources of funding through grants from government, local utilities, and other organizations with a focus on environmental restoration and community revitalization. By acting on and responding to sustainability issues, Jewish communal organizations can demonstrate excellence in operations, while emphasizing the Jewish values inherent in these sustainability best practices.

The missions and visions of our nonprofit organizations focus on providing for the welfare and needs of those in our community. Rarely do our organizations, however, actively focus on the need to recruit and expand the staff talent to make the organization successful in implementing those missions. The general misperception of donors is that low overhead costs maximize the effect of their donation (Pallotta, 2012). In contrast, to make the case for "smart giving," we need to invest in increasing our own internal strength to role model best practices.

Creating a strategic plan for pursuing sustainability-focused operations is not intuitive: One must seek the most suitable resources and make changes in the most efficient manner. "Even if one has the desire, it takes time. With everything else that the members of our Jewish communal leadership have to do, they often don't have time to learn this new discipline," explains Rabbi Nina Beth Cardin, founder and director of the Baltimore Jewish Environmental Network (BJEN). Addressing environmental and sustainable issues can seem overwhelming and insurmountable without knowledgeable and dedicated staff.

Through a focus on sustainability, Jewish organizations can excite and inspire their donor base.

Employing a Sustainability Manager can have a far-reaching positive impact. Sustainability management, used as the conduit for cross-collaboration and communication both in and outside an organization, can fulfill these functions: benchmarking products used/purchased and evaluating their economic and environmental impact; educating and engaging employees to help the organization realize and achieve its sustainability goals; identifying community stakeholders and collecting their feedback about the effectiveness of initiatives; pinpointing key partners to collaborate on projects and share resources; creating sustainability metrics for evaluating and demonstrating progress and outcomes; and responding to new opportunities as they are discovered (Klafter, 2010).

In a demonstration of its commitment toward integrating sustainability with organizational best practices, The Associated: Jewish Community Federation of Baltimore established the Sustainability Initiative in July 2011. It is led by a full-time professional, guided by a steering committee led by two co-chairs—a past chair of the board of The Associated, and Rabbi Cardin, founder and director of BJEN. Representatives of several Associated agencies and many prominent community stakeholders serve on the Sustainability Initiative committee and its five related work groups and task forces, helping govern, guide, develop, and integrate sustainability measures throughout The Associated and local Jewish community.

The Sustainability Initiative brings together sustainability enterprises and efforts for internal operations throughout THE ASSOCIATED and its agencies, as well as from synagogues and day schools. It has three main functions: implementing sustainability benchmarking and institutional goal-setting, developing sustainability best practices through facilities management, and increasing community awareness and engagement. In just over a year, the Sustainability Initiative has significantly contributed to and continued the momentum already in progress in Jewish Baltimore, including:

- *Increased agency and organizational engagement* via integration with programs such as Agency Excellence Organizational Review, Green Synagogue Initiative (in which 14 synagogues are involved), and the Day School Initiative, funded by a two-year grant from the AVI CHAI foundation to foster participation of nine day schools in energy efficiency assessments and projects.
- *Waste reduction through single-stream recycling program improvements*: THE ASSOCIATED agencies have diverted approximately 2,150 cubic yards of waste from landfills annually, the equivalent of 7,275 full bathtubs worth of trash! To ensure the use of the most effective methods for front end collection and back end disposal, we engaged a consultant, recruited through one of our agencies, to conduct a thorough waste audit for two of our largest buildings. Data generated from this assessment are helping inform improvements and standardization of the recycling program across THE ASSOCIATED system.
- *Promoting energy efficiency projects and funding procure*ment for THE ASSOCIATED system, day schools, and synagogues
- *Increased volunteer opportunities and engagement through communal events and environmental projects*: In one project, THE ASSOCIATED, in partnership with a local environmental group and synagogue, received funding from a statewide environmental NGO and a community foundation to remove almost 5,000 square feet from the synagogue parking lot and 1,500 square feet of invasive plants and replace them with a continuation of the stream corridor lined with native landscaping.

The Sustainability Initiative anticipates launching a comprehensive sustainability web portal in 2013, which will help further the adoption of more sustainable practices for individual households, organizations, institutions, and businesses across the community.

CONCLUSION

No longer is the question, "should we?" but "how can we" reduce our environmental impact and integrate the Jewish values that reflect social responsibility into mindful operations of our Jewish Communal Service organizations. THE ASSOCIATED recognizes that sustainability is not a one-time project, but an ongoing effort using dedicated, professional staff to lead the development and execution of a strategic initiative that will help enhance our community vibrancy and quality of life.

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Consumers and Stakeholders

Becoming a Welcoming Organization

Erica ***Brown***

With so many nonprofits to support and the economy not quite at recovery, more Jewish organizations are including customer service training for professionals and lay leaders so that they can stand out and be noted for a high level of efficiency and effectiveness, politeness, and warmth. Each of our organizations wants to offer the elegance and friendliness of a Ritz-Carlton, the flexibility of an L.L. Bean, and the return policy of Nordstrom's—all leaders in the business of customer service. When we offer mediocre service and fail to smile through it, we are aware that lay leaders can and will offer their time elsewhere and that donors have many other places to invest their philanthropic dollars.

But the term "customer service" does not feel right somehow; we do not want customers to treat us merely in a transactional fashion because with transactions that are more business-like, we risk losing people after one bad encounter. We do not want people to complain, exchange, or return what they perceive as a bad experience, to use language familiar to customers. Instead, we want stakeholders: individuals who are highly engaged, informed, and committed. A stakeholder does not leave us after one bad experience. A stakeholder understands that in all relationships mistakes happen. In transactions, one bad interaction spells doom, whereas in relationships, one bad interaction is an accepted norm and an occasion for learning and improvement. Customer service is too shallow a term to create and cultivate the kind of relationships that will ultimately make the difference in our work.

At the same time that we want stakeholders, however, our professionals are often too busy creating and reinforcing consumer-like relationships. If we want stakeholders, then we need to treat people like stakeholders. Contacting a "customer" once a year for a donation, sending a thank-you that is really a request for more money, and offering only one way to be involved—by check—is not going to create a cadre of supporters, volunteers, and leaders. Neither will scripting every speech, rubber-stamping decisions, or e-mailing every "conversation" instead of meeting face to face and talking. The breakdown in the lay/professional partnership is hardly a surprise when you consider how far this once engaged partnership has moved for many from a relationship to an obligation to a chore.

If we shifted our orientation from transactional to hospitable, we might notice a sea change in relationships.

One word that best captures the relationship we are trying to create is not service but *hospitality*. If we shifted our orientation from transactional to hospitable, we might notice a sea change in relationships. If I treat everyone like a guest in my own home every time they come into my office, I am signaling to them that I care in a more intense and profound way about them and about the organization where my office sits. One business guru who has mastered what he calls legendary hospitality is Danny Meyer, the head of a conglomerate of restaurants

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known for the way they treat guests; his restaurants include Gramercy Tavern, Union Square Café, and Eleven. In his 2008 book, *Setting the Table: The Transforming Power of Hospitality in Business*, Meyer makes the case for hospitality:

Hospitality is the foundation of my business philosophy. Virtually nothing else is as important as how one is made to feel in any business transaction. Hospitality exists when you believe the other person is on your side. The converse is just as true. Hospitality is present when something happens for you. It is absent when something happens to you. These two simple prepositions—for and to—express it all.

He makes a key distinction between service and hospitality and the importance of knowing the difference between the two:

Understanding the distinction between service and hospitality has been at the foundation of our success. Service is the technical delivery of a product. Hospitality is how the delivery of that product makes its recipient feel. Service is a monologue—we decide how we want to do things and set our own standards for service. Hospitality, on the other hand, is a dialogue. To be on a guest's side requires listening to that person with every sense, and following up with a thoughtful gracious response. It takes both great service and great hospitality to rise to the top.

Elsewhere Meyer suggests that service is what people expect, but that hospitality is what they get that they did not expect—the gifts of kindness and graciousness that have staying power and make a customer return again and again. In the category of legendary hospitality for Meyer is the experience of the couple who came into one of his restaurants to celebrate their anniversary. Knowing this, the waiter offered them each a complimentary glass of champagne. Since this offer was expected, it falls in the category of service rather than hospitality. But when the husband asked the waiter if an expensive bottle of champagne that he put in the freezer and forgot to remove would explode, and the waiter said yes, the husband panicked and told his wife he would have to excuse himself. The waiter calmed him down, asked for his address, and then sent someone to remove the bottle of champagne from the freezer, leaving a card and a small gift on the kitchen counter—all at no charge. Meyer's attitude about this encounter is that it was the cheapest advertising he could hope for because he knows that legendary hospitality is what people remember, what people share with others, and what makes people return.

We have our own tradition of legendary hospitality; it is called the mitzvah of *hakhnasat orkhim*, welcoming guests. Technically speaking, the word "welcoming" does not fully capture the true meaning of this mitzvah. To welcome is merely the way that we make our initial encounter—it is the doormat rather than the sustained relationship over time. Instead, the infinitive *lehakhnis* means to help one enter, to bring someone in, to take someone who is on the outside of our orbit and put him or her within our universe of concerns.

There are many laws and traditions that help us accomplish this mitzvah. Welcoming guests is not merely about inviting someone to dinner; it is about making our table into a place of safety and comfort for those most vulnerable, particularly strangers. Newcomers, those not in nuclear families, and people suffering loneliness should be on the top of our guest list according to Jewish law. Our most important meal of the year, the Seder, emphasizes this by inviting all

who are hungry to come and eat. This invitation graces the pedestal of the Statue of Liberty in Emma Lazarus's poem and is from a talmudic passage about a special scholar, Rabbi Huna:

Raba said to Rafram bar Papa: "Tell me some of the good deeds which Rabbi Huna has done." He replied: "Of his childhood I do not recollect anything, but of his old age I do. When he had a meal he would open the door wide and declare, 'Whosoever is in need let him come and eat'" (Babylonian Talmud, Taanit 20b).

According to an ancient rabbinic text, we should take pleasure in being able to provide a sense of welcome and belonging: "Be happy as you sit at your table and the hungry are enjoying your hospitality" (Derech Eretz Zuta 9).

But we need to go further back from the Talmud, all the way to Genesis, where Abraham becomes the primary model for the commandment to welcome guests:

The Lord appeared to Abraham near the great trees of Mamre while he was sitting at the entrance to his tent in the heat of the day. Abraham looked up and saw three men standing nearby. When he saw them, he hurried from the entrance of his tent to meet them and bowed low to the ground. He said, "If I have found favor in your eyes, my lord, do not pass your servant by. Let a little water be brought, and then you may all wash your feet and rest under this tree. Let me get you something to eat, so you can be refreshed and then go on your way—now that you have come to your servant." "Very well," they answered, "do as you say." So Abraham hurried into the tent to Sarah. "Quick," he said, "get three seahs of fine flour and knead it and bake some bread." Then he ran to the herd and selected a choice, tender calf and gave it to a servant, who hurried to prepare it. He then brought some curds and milk and the calf that had been prepared, and set these before them (Genesis 18).

If you read this text carefully, you notice a few critical details that help us understand the key to welcoming guests. Abraham sits outside of his tent in the heat of the day, not a particularly comfortable time to be out in the Near Eastern sun, specifically on the lookout for those in need. We all recognize people with that Abraham-radar; they make it a point of reaching out to new employees, new neighbors, new faces. They do not worry about the embarrassment of a "no" when they ask, "Are you new here?" They care more about connecting and communicating warmth than saving face.

Abraham oddly bows low to his guests, a gesture that suggests humility. A humble posture makes sense in response to the stranger because in actuality, it is the stranger who feels humble. Those who do not know the language, the inside jokes, the mannerisms of the citizens and residents of a place can feel the indignity of ignorance. Abraham lowers himself as if to suggest that he has no upper hand merely because he is of the place. He puts himself on equal standing with three people he has never met.

The text also emphasizes speed. Abraham insists that his guests rest themselves, wash, and allow him to feed them. He rushes his household to prepare an elaborate and expensive meal. He does not offer his guests a snack, but the best of what he has. There is a Jewish custom that the owners of a home should be the one serving guests because they are least likely to be stingy with their food.

We learn from Abraham that one must accompany guests out of our homes a distance of four cubits—the equivalent of about six feet. We are not rushing

them out or slamming a door in their faces when a meal is done. In fact, *hakhnasat orkhim* has little to do with food, but has everything to do with welcoming people into our space, embracing their presence when they are with us, and ushering them out with a nurturing hand by moving our feet in consonance with theirs. We are sad when our guests leave.

Contemporary scholar Blu Greenberg writes about the importance of teaching children this fundamental Jewish value in *How to Run a Traditional Jewish Household* (1988):

Hachnasat orchim [welcoming guests] is a wonderful mitzvah for children: a) it is a concrete model from which to learn the art of sharing; b) children have an opportunity to become acquainted with all different kinds of people, including non-Jews; c) it reminds them, periodically, that they are not the center of the universe.

You cannot be a Jew alone. Community is at the heart of our people, and we build communities one relationship at a time, moving people from the outside of our world to the intimacy of our lives. When we educate people about this value we are communicating to everyone—not only children—that we are not the center of the universe. The tension between self and other need not be a tension at all.

Using Abraham's legendary hospitality as a precedent, we begin to understand the difference between service and hospitality, between a customer and a friend. Abraham sat at the threshold bringing guests into his tent. Too often, we stand behind doors and now, security desks, complaining that not enough people are members, joiners, or participants. That is different from placing ourselves on the other side of the threshold, looking out for strangers and ushering them into our spaces or letting go of the language of insiders and outsiders, buildings and builders altogether. We often believe that if we could just get someone through the doors, we would have a customer for life. That is different from believing that if we could just reach out to meet people where they are, then we might have a friend for life who will accompany us to programs and services simply by virtue of being part of a relationship of meaning.

Community is at the heart of our people, and we build communities one relationship at a time.

Any conversation about *hakhnasat orkhim* must also consider what it means to be a good guest, not only a good host. In the traditional grace after meals, the guest blesses the host: "May the Merciful One bless the heads of this household, their entire family, and all that is theirs." This is a public, formalized statement of thanks. The Talmud also mentions some private conversations or gossip that guests might think or say to others. All hosts take a risk when they invite a guest into their homes and into their lives. Others can and do inspect, reflect, criticize, and judge us in our most intimate spaces. For this reason, the Talmud offers us some guidance:

What does a good guest say? "How much trouble my host has gone to for me. How much meat he has set before me. How much wine he has given me. How many cakes he has served me. And all this trouble he has gone to for my sake!" But an inconsiderate guest, what does he say? "What kind of effort did the host make for me? I have eaten only one slice of bread. I have eaten only one piece of meat, and I have drunk only one cup of wine! Whatever trouble the host went to was done only for the sake of his wife and children" (Babylonian Talmud Berakhot 58A)

Good guests notice and praise in detail all that a host does. Inconsiderate guests diminish a host's selflessness and minimize a host's efforts. The noted

scholar of ethics, Rabbi Joseph Telushkin (2000), observes this dilemma in his own house:

I know that when my wife and I entertain, we spend hours preparing the house and planning the event so that our guests can spend as pleasant an evening as possible. The thought that some of them might afterwards dissect us critically pains me. And I don't think I am being paranoid in suspecting that many of them do so; I realize how often I have acted that way myself.

When we put ourselves out for others, especially strangers, it is painful to be skewered or be the subject of malicious conversation. Instead, we might take a recommendation from Miss Manners:

It is easy to be the perfect houseguest. All you have to do is to remember everything you've learned in the last few years about being totally honest, in touch with your feelings, able to communicate your needs and committed to doing what makes you feel comfortable. And then forget it.

She mentions that the best gift a guest can offer is silence and a thank-you note. Maybe this fear of guests was the inspiration for something my Zeide, of blessed memory, used to always say about company: "Put a dollar in the *pushke* (the tzedakah box) when they come and two dollars when they go!"

In a culture of entitlement, sometimes we extend legendary hospitality only to be met with criticism and dissatisfaction. It is hard to maintain the enthusiasm and energy needed to provide great hospitality when nothing we do is good enough to make someone else happy. For this reason, it is important that we help educate people about what it means to be a good guest. Some people lack the self-awareness to understand when their incivility or rudeness is dampening any chances of creating a relationship.

Legendary hospitality can have legendary consequences. In the story of Abraham, it is only later that his mystery guests reveal themselves to be angels delivering a message of relief and redemption for Abraham and Sarah. After decades of barrenness, Sarah would finally become a mother, and Abraham would finally get his long-awaited heir. We cannot always expect such results from our efforts, but we can remove from the story its mythic dimensions and appreciate its most basic lesson, one seminal to the ethos and Jewish values that should permeate our nonprofits. Sometimes when we bring strangers into our lives we turn them into friends. Sometimes, they even become angels.

Sometimes when we bring strangers into our lives we turn them into friends. Sometimes, they even become angels.

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Big Ideas, Bold Solutions for JCSA

Charles ***Edelsberg***

Never have I seen the Jewish community as turbulent—but also as generative—as it is today. Change—social, political, and certainly technological—is happening at an unprecedented rate. Let us consider the cycle of innovation and the attendant disruptions that change foists on us all.

The innovation chain proceeds something like this. First, an idea for a new product, invention, or service is contemplated as being **possible.** Then, we find the innovation **present** in our lives. If successful, the idea grows to be **popular**. It may actually become **pervasive**. And the most widely accepted of these products/inventions or new services work their way into our lives, gaining an almost **ubiquitous** presence.

So is there a big idea out there that can rejuvenate JCSA?

I am told that many of you would be surprised to discover that the organization needs an infusion of life blood—new members, substantially more operating revenue, and a plan for its future that evidences promise for sustainability. Yet that is the case, and that is why your participation in the JCSA Annual Meeting is critically important. You are professionals who appreciate that your work is part of a greater whole:

- a resilient Jewish community with an extraordinary history of organizing itself to take care of its own
- a woven tapestry of institutions and individuals whose values, faith practices, and shared history conjoin us as people who endure and prevail despite persecution, genocide, exile, and persistent anti-Semitism
- a community aspiring all the while to be an *ohr l'goyim*—a light unto the nations

The question is not whether Jewish communal service will change; the question is will it survive.

You are the vanguard of your peers, looking for connection with other professionals, interested in continuing education and skill building, and cognizant that a broader awareness of Jewish demographics and insight into our community's sociology will make you a better professional.

But do you have the status of a professional in the organization that employs you?

Samuel Silberman, past president of a prominent New York Jewish agency, once remarked that "to be a profession, Jewish communal service must be more than Jewish workers working with Jews in and through Jewish-sponsored institutions." He further asserted, "As the Jewish community matures, it tends to lose its blind faith in institutions and starts to demand defined objectives, effectiveness, and accountability. The question is not whether Jewish communal service will change; the question is will it survive. If it doesn't change, it can't survive."

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Plenary address given to the JCSA Annual Meeting, Baltimore, June 5, 2012.

How surprised are you that Sam Silberman offered these predictions in an article in the JCSA journal 40 years ago!

More than a quarter-century after Silberman's article, Professor Gerald Bubis opined in another JCSA journal article that "there is still no agreement, except in counseling settings, as to what staff are supposed to know, how they are to apply their skills, and how to measure their competencies." In other words, the profession of Jewish communal service did not exist.

In that same 1999 essay—titled "The Jewish Communal Professional in the 21st Century"—Dr. Bubis observed that JCSA "as a standard-setter for the field and a representative for its members at a multiplicity of levels has never been given sanction."

Here we are, 13 years later, and nothing much has changed.

Yet the independent sector in which we all work is a growing part of the American economy, representing about 12% of our annual gross national product. In philanthropy, the proliferation of both information and funding intermediaries has dramatically changed the face of charitable giving. Those of us who enjoy the privilege of influencing how foundations award their grant dollars, as well as the responsibility for providing wise counsel on the strategic use of precious philanthropic resources, recognize that these intermediaries create new market dynamics. Knowing what these intermediaries are, why they were formed, and what their effects are constitutes a burgeoning body of knowledge that I must learn and master if I am to function effectively as executive director of a billion dollar Jewish foundation. It is but one aspect of the professional role I assume in leading the Jim Joseph foundation.

And so I pose this nagging question: Are we fundamentally ***service providers*** in a field? Or bona fide ***professionals*** by virtue of our command of knowledge, acquisition of skill sets, adherence to articulated standards of practice, commitment to relevant continuing education, and cultivation of expertise?

It should come as no surprise that I subscribe to the latter view.

Are we fundamentally service providers in a field? Or bona fide professionals...

I recognize, however, that if you approach your daily work as a job and not as an opportunity to develop a career as a Jewish professional, the question of whether you are a service worker or a Jewish professional may be irrelevant. I also acknowledge that practitioners who are the line labor force in the Jewish community confront a different set of questions about employment status than do senior management and chief executives.

Nevertheless, I want to challenge you to think about mutual interest. Is it advantageous to us, to the clients, and to the members of the institutions whose lives we endeavor to improve with our work, as well as to the board of directors who govern the organizations that employ us, to do the following?:

1. Codify a body of knowledge that represents, across our diverse settings, the core of what Jewish communal professionals should know
2. With such a corpus of knowledge identified, create a system of continuing professional education, participation in which leads to CPE credit
3. Establish mechanisms by which CPE credit earned leads to workplace rewards
4. Craft a universally accepted Jewish code of conduct for boards of director that, if violated in any egregious way by individual lay leaders, would result in sanctions for misconduct

I do not know whether we can accomplish these four daunting challenges, but I am convinced we need at long last to set about to do so—not with a blue-ribbon panel, but with a contemporary Sanhedrin; not with national summits, but with a genuine jewish *kehillah* (community); and not by producing a "Contract With America" type document, but by crafting a communally endorsed covenant of principles and standards that would carry import, clout, and moral authority.

And although I am not clear that it is JCSA's job to lead this effort—I am, in fact, skeptical that JCSA could do so without reengineering itself—I see this as an opportunity on which it is imperative for the organization to capitalize.

Envision just one scenario whereby a revitalized JCSA could facilitate your continuing education. I imagine a curated website containing profiles of and ratings on institutions of higher education that offer certificates and degrees in nonprofit philanthropy, written by Jewish professionals who are graduates of the programs you might be contemplating pursuing. How helpful would it be to you to have a hub to go to learn about these multitude of options—and not by conducting a series of Google searches?

I see a future in which JCSA becomes a real Jewish communal professionals' network—**a JCPN**. The JCPN would be a hub of job information and a link to sources of both Jewish and not-for-profit learning. The hub would offer its members details on courses, workshops, and webinars germane to their work; access to mentors; guidelines for enhancing their online professional presence; and opportunities for Israel experiences with a cross-section of Jewish professionals.

This reinvented organization would have formal relationships with career sites like jewishjobs.com and links to such sites as kveller.com and myjewishlearning.com that are customized to the user, referring him or her to recommended topics of interest based on that individual's previous choices and preferences.

However, I have little confidence that my vision of a JCPN is either big or bold enough to be the solution I propose we seek—that of a single national organization possessing power and authority to shape goals, delineate essential knowledge (both Jewish and secular), facilitate continuing education, and sanction training for Jewish professionals.

People get smarter in networks.

No one individual alone is up to this task. The JCPN or JCSA needs your involvement if it is to flourish. The current JCSA leadership—all highly experienced Jewish communal professionals who are committed passionately to the future of this organization and are laden with good ideas—do not represent a sufficiently broad or deep enough sample of the Jewish professional stakeholders from throughout **your** networks to get us where we need to be.

Here is what young Jewish professionals have taught me: People get smarter in networks. As Steven Johnson notes insightfully in his 2011 book, *Where Good Ideas Come From*,

The truth is, when one looks at innovation…environments that build walls around good ideas tend to be less innovative in the long run than more open-ended environments. Good ideas may not want to be free, but they do want to connect, fuse, recombine. They want to reinvent themselves by crossing conceptual borders. They want to complete each other as much as they want to compete.

Permit me to conclude where we began: with *limmud* (learning) for me and for JCSA. I would like to ask for your wisdom. It exists in this "crowd," I am certain.

Please share one big idea you would like your organization, JCSA, or the Jewish nonprofit communal world to explore; post it on www.facebook.com/Jewishcommunalserviceassociation. The idea can relate to anything: a benefit pool for all Jewish communal professionals; sabbaticals for managers and chief executives; cross-institutional Israel experiences for Jewish employees; a national Jewish professional training institute housed in a state-of-the-art retreat center.

We share common bonds, but I do not believe we pay enough attention to fostering "bridging capital" by crowdsourcing more of our innovation work, which in turn would animate spillovers of creativity and ingenuity.

I want to challenge you with a *mantra* that has become popular in the Bay Area. We used to say, "If it isn't broke, don't fix it." Today, we might be better advised to contemplate that "if it works, it's obsolete."

The Association of the Social Scientific Study of Jewry (ASSJ)
Announces the 2012 Berman Service Award and the 2012 Marshall Sklare Award

☛The Association for the Social Scientific Study of Jewry (ASSJ) is proud to announce the inaugural recipients of the **Berman Service Award**. Named for Mandel "Bill" Berman, a great philanthropist and supporter of ASSJ and various other research entities, the Berman Service Award recognizes the work of leaders in many sectors of the Jewish community whose efforts have advanced the social science of Jewry. This year's award goes to **Arnold Dashefsky** of the University of Connecticut in recognition of his distinguished commitment to the social scientific study of Jews through service to ASSJ, the North American Jewish Data Bank, and numerous other venues.

☛The ASSJ is also proud to announce the 2012 **Marshall Sklare Award**, which is given annually to a senior scholar who has made a significant scholarly contribution to the social scientific study of Jewry. This year's honoree is **Leonard Saxe**, Klutznick Professor of Contemporary Jewish Studies and Director of the Cohen Center for Modern Jewish Studies and the Steinhardt Social Research Institute at Brandeis University. His Sklare address, "The Science of the Scientific Study of Jewry," will be published in a forthcoming issue of ASSJ's journal, *Contemporary Jewry.*

The Association for the Social Scientific Study of Jewry is an international, cross-disciplinary organization of individuals whose research and interests concern the Jewish people throughout the world. For more information on ASSJ or to join, visit the website www.assj.org or contact exec@assj.org.

From Programs to Platforms

Eight Ways to Capitalize on the Changing Value Offered by Institutions

Lisa ***Colton****, Bill* ***Robinson****, and Miriam* ***Brosseau***

Glancing through the mission statements of so many Jewish organizations—from synagogues and schools to JCCs and Federations—it appears that we all share the vital goal to "create and support community." But what exactly is "community," and what can organizations and professionals actually do to strengthen it?

Martin Buber offers an understanding of community by distinguishing it from collectivity: "Collectivity is not a binding, but a bundling together; individuals packed together, armed and equipped in common, with only as much life from man to man as will inflame the marching step.… Community… is the being no longer side by side but *with* one another of a multitude of persons.… [While] collectivity is based on an organized atrophy of personal existence, community [is based] on its increase and confirmation in life lived toward one another" (Buber, 2002, pp. 31–32).

Businesses and sports teams are examples of collectivities. People come together to pursue goals that are extrinsic to the relationships between themselves. The ways in which I should act in a business or on a sports team toward my fellow members are primarily geared to achieving the goals of making money and/or winning. In contrast, an actual community is driven by a set of core values, which define how members should act. Even if a community needs to make money to survive (as many do), openness, caring, and mutual responsibility (as examples of core values) would drive my behavior toward other community members, over immediate financial goals. As Buber (2002) also writes, "The purpose of community is community."

FOUR TYPES OF SOCIAL ORDERS

Max Weber (1968), the founder of modern sociology, offers another useful perspective. Weber distinguished between four ideal ways or types of social order in which people come together:

- **Traditional,** where our being together seems normative, as a given
- **Charismatic,** temporary experiences where emotional bounds are at the center
- **Instrumental Rational,** where specific rules and procedures guide how we interact
- **Value Rational,** where shared values and vision guide how we relate to one another

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If we examine Jewish institutional life, we can see all four of these approaches at play, often in combination with one another. Embodying the *traditional* approach, Jews in the South often congregated in their own Jewish versions of country clubs and debutante-style balls. These ethnic enclaves were seen as a given, as a natural aspect of existence in the American South (and elsewhere). They were just the ways things were, given cultural norms at the time.

Many immersive Jewish experiences such as Israel trips and camps, are best described as *charismatic* and emotionally infused. Youth and young adults come together for a liminal experience, in which the traditional norms of their lives are suspended. In these moments, they are more open to experiencing the power of Judaism and the camaraderie of being with other Jews. In Weber's typology, a charismatic social order does not need a charismatic leader; it is defined by the essential quality and nature of relationships among the participants.

Although today's Jewish organizations often combine elements of all four types, they, along with modern society in general, tend to focus on the *instrumental rational* rules and procedures that range from paying a la carte fees for specific programs to annual membership dues to get access to an on-call rabbi, High Holiday seats, and a Bar/Bat Mitzvah (though additional charges may apply). They have increasingly gravitated toward a model of "transactional Judaism," which as Weber points out is a perfectly rational way for an organization to behave. Using Buber's formulation, this transactional Judaism limits us to a collectivity, because what is understood as rational is how our actions are the means to achieve an external end, such as the synagogue bottom line. By reinforcing structures of a collectivity, we build our own communal glass ceiling.

None of these examples—the country club, the Israel trip, or synagogue—are by themselves an actual community, in which values are at the core of decision making and how individuals relate to one another. In community (which is Weber's *value-rational* social order), people are bound together primarily by a *shared sense of mutual responsibility toward one another* (as an intrinsic value)—not because they have to, not only during transitory liminal moments in their life, and not based primarily on a transactional relationship.

Although society is filled with transactional relations, Jews are not seeking more transactional opportunities, and in fact what Judaism has to provide is the respite from a transactional world. Recently, the Jewish Education Project has undertaken research to learn more about the desires, needs, and concerns of families with young children. In the course of several focus groups, families with young children strongly expressed their desire for more than play dates and programmed activities. They wanted actual community where they would feel closeness and commitment to other members. For example, they envied those informal communities where families self-organize to bring food all week long to their friends with newborns. Yet they did not know how to create these kinds of communities intentionally, for themselves.

The challenge for Jewish organizations today is to understand how to guide and support families in creating the experience of actual community.

The challenge for Jewish organizations today is to understand how to guide and support families in creating the experience of actual community (with the understanding that organizations still need to be rationally instrumental and attend to the bottom line). This means shifting our models from designing and offering programs that meet the concrete needs of families to building platforms where families can self-organize to realize their aspirations.[1]

In the past, organizations provided a critical organizing function that individuals alone could rarely achieve. More recently, digital communications and collaborative tools have empowered the masses to create, coordinate, and collaborate in previously unheard of ways. These new tools have empowered the Occupy Wall Street movement and those who have overthrown governments around the world. These tools have also made possible indie minyanim and Moishe Houses, among many other examples in the Jewish world.

Clay Shirky, professor at New York University and author of *Here Comes Everybody* (2009), describes this shift by acknowledging that "organizations no longer have a monopoly on organizing." In the past, Jewish organizations may have been the coordinators of Jewish community, but that does not necessarily mean that they created the community. In today's individually empowered world, the traditional role of organizations is becoming obsolete. Thus, to continue to have purpose, value, and viability, organizations must identify and adapt to fill a modern void. They need to move from providing programs to being platforms for communal self-organizing and connectivity.

In the technological world, a platform is the hardware and software that allow applications to run. It provides all the necessary elements to facilitate purposeful and successful human activity. An organization acting as a platform is much the same: It is a structural framework—logistical and technical—built to support a specific purpose. The platform organization, like the technological platform, is incomplete without the human activity, and it is open and flexible, allowing humans to infuse their own creativity and adapt and evolve the platform as needed.

As many organizations have found in the past decade of change, the ability to adapt—culturally, financially, and technically—is essential for survival and growth in today's rapidly changing landscape. Although often scary and intimidating, this pressure to change is in fact incredibly healthy. It is forcing us to ask deep questions about the legacy and future of Jewish life, identity, knowledge, and community. Through inspiration in some areas and exasperation in others, it is pushing us to clarify where professional expertise and effort can support and catalyze the things we value. Conversely, this pressure to change also indicates where over-functioning professional staff—who take over and do for individuals—may in fact be disempowering individuals, stifling community, and limiting ourselves to a collectivity.

GUIDING PRINCIPLES

Thus, to help organizations adapt, we present eight guiding principles to enable organizations to shift from program providers to platforms for self-organizing and connectivity based on shared purpose and values.

1. Listen, Trust, and Empower.

When we professionals and institutions take full responsibility for visioning, planning, and bringing to life the assets of the community, we disempower individuals,

[1] For those in early childhood, this will be familiar as a switch from teacher-directed learning to a child-centered approach, associated with social constructivism and notably the schools of Reggio Emilia. As always, there is much we can learn from the early years.

sever the ties of the I–Thou relationship, and stunt the shared sense of mutual responsibility toward one another that is the basis for true community. Therefore, professionals and institutions need to empower those within the community to take responsibility, so they can manifest those values and vision through Jewish holiday celebrations, Shabbat observances, and life-cycle rituals, as well as (*chevruta*-style) learning and a deep commitment to one another and the Jewish tradition.

On a practical level, it means that we must carefully listen to hear where the community has shared interests, goals, and energy to invest and then trust in the community members to take leadership. At one congregation, a mother complained to the early childhood director about the lack of an infant play group for kids younger than two and a half. She felt excluded from the community until her child reached this age. The director's response to her was, "Want to help create one?" With a bit of support and the offer of an open room on Thursday afternoons, together they launched a synagogue-based infant/parent playgroup that has engaged several new families in its first year.

2. Practice *Tzim Tzum* Leadership.

Empowering others means letting go. It will require practicing new forms of collaborative and distributive leadership that may seem strange and awkward at first. Boards, staff, and committees may need to redefine their roles and how they function. Traditional leaders will need to contract—*tzim tzum*—to make room for others to step in and lead in both small and large ways. The transition from hierarchies to flatter leadership means that those in every role need to listen carefully to the needs and interests of the community and be more open in their planning and decision making. The old control-and-command model does not work effectively in this connected age.

It also means that the entire community is responsible for the success of the shared communal mission. Organizations thus need to be more transparent, giving all stakeholders the information and insight to feel shared ownership and mutual responsibility. Future leaders should share this vision, shifting the culture and the actions of the organization over the coming years.

The old control-and-command model does not work effectively in this connected age.

3. Weave Networks.

The specific roles, skills, and uses of staff change in this new paradigm. Rather than doing the work in a fee-for-service model or executing programs and recruiting people to participate, many staff will need to be network weavers, intentionally connecting people to one another where the connection would be valuable to the individuals and to the strengthening of the community (see the article by Fishman in this issue).

In a 2011 issue of the *Journal of Jewish Communal Service*, Rabbi Rachel Nussbaum, founder of the Kavana Cooperative in Seattle, shared the centrality of network weaving to her work:

Many of Kavana's most successful programs have community building as a core goal, and use some degree of social engineering as a means to this end. Our home-hospitality Shabbat program, for example, is deceptively simple in that it requires no space, rental (partners host small groups in their own home for Shabbat dinner on designated dates), no programming supplies or food (meals are potluck), and no

formal curriculum (each host family is encouraged to share how it celebrates Shabbat). But behind the scenes, this is one of the more complex (and administratively labor-intensive) programs that Kavana runs.... As the rabbi of the community, nothing is more gratifying to me than knowing that the matches we make sometimes lead to genuine friendships and a true sense of social connection (Nussbaum, 2011, pp. 106–107),

4. Try New Financial Models.

In 2010 Chris Anderson wrote *Free: How Today's Smartest Businesses Profit by Giving Something for Nothing*, describing the economic benefit to customers and businesses as prices fall to zero. Businesses increasingly are finding powerful and viable indirect routes from product to revenue, such as freemiums[2] and open source software development and customization. These innovative—and profitable—business models were unthinkable just a few years ago, but are making possible new kinds of businesses as well as providing access to a whole new range of consumers.

In many Jewish communal settings, our current financial models reinforce transactional Judaism and function to exclude (either emotionally or functionally) many people from participating in Jewish communal life. Perpetuating these models further denigrates (or limits) the community we are seeking to build. Therefore, we must question assumptions that have driven our business models for decades, seeking efficiencies to reduce costs (less over-functioning, more collaboration), opening the peripheries of our communities to invite in new participants, and exploring new models and sources of revenue.

The JCC of Manhattan has launched the Jewish Journey Project (http://www.jewishjourneyproject.org), an educational opportunity that brings together students from nine institutions (seven synagogues and two JCCs) and the expertise of many more local organizations. In Westchester, New York, the Jewish Education Project is piloting a community-wide collaboration of more than a dozen congregations to offer innovative teen learning. These collaborations are providing more flexibility and opportunity, together with great efficiencies, than any one institution could achieve alone.

Our current financial models reinforce transactional Judaism and function to exclude ...many people from participating in Jewish communal life.

In the synagogue field, at least two congregations (Temple Israel in Sharon, Massachusetts (http://ejewishphilanthropy.com/scrapping-synagogue-dues-a-case-study) and Temple Kol Ami in West Bloomfield, Michigan (http://www.thejewishnews.com/from-the-heart) have recently dropped their dues structures completely, opting for a more voluntary and empowering approach. Temple Kol Ami's pledge system is called *t'rumot halev* or "gifts of the heart." "It is about making a pledge from the heart, rather than paying a bill," explained Paul Gross, Kol Ami's first vice president. The name originates from the book of Exodus. "Moshe asked the Israelites to bring *t'rumot* (offerings) to the tabernacle," explained Assistant Rabbi Ariana Jaffe Silverman in an article in the *Detroit Jewish News*. "There was not the same assigned amount for everyone, but they were asked to bring what they could afford and to pay as their hearts moved them. They brought so much that it was too much."

[2] Freemium is a business model by which a product or service (such as media, games, or web services) is provided free of charge, but users may opt to pay a premium for advanced features, functionality, or access.

5. Become Agile.

Originally used in the software development field, the quality of being "agile" is becoming a norm across many disciplines, and for good reason. Researching, planning, funding, developing, beta testing, and launching a product take too long. Instead, being in "perpetual beta" mode (http://en.wikipedia.org/wiki/Perpetual_beta) encourages us to develop a product in the open, allowing for constant updates and adjustments in response to feedback and user testing and leading to a more successful (and profitable) product. Publisher and open-source advocate Tim O'Reilly was years ahead of his time when he proclaimed in 2005 that "users must be treated as co-developers" and that we will achieve our goals by "harnessing collective intelligence" (O'Reilly, 2005, p. 4).

For the next several years, if not decades, we will see much change. To successfully navigate this change, it is critical that our leaders, institutions, and policies remain nimble and able to adapt to new information, data, and societal shifts. As we have already seen during the last few years of economic strain, the most rigid organizations are at the greatest risk of collapse.

6. Measure What Matters.

In a model in which organizations run programs, we often measure success by the number of *tushes* in the seats. This form of evaluation generally captures our efforts to attract and transact with the greatest number of people, for the success of the program, the organization, and (we like to think) the Jewish people. Yet in the new platform model, what we measure, how we measure, and what we do with the data are entirely different.

In a recent initiative, Sustainable Synagogue Business Models, overseen and funded by UJA-Federation of New York and facilitated by Measuring Success consultants, congregations collected and analyzed data to help synagogue leaders address some of today's toughest questions: Is our current dues-based funding model financially sustainable? Can we more effectively engender the sacred community we envision? They learned that they were grossly over-investing resources in some areas and under-investing in others. "Our congregation's leadership engages in ongoing discussions regarding how to best spend our resources to fulfill our mission," reported participant Rabbi Michael White from Temple Sinai of Roslyn Heights. "I now understand that we have been acting in a bubble, often divorced from the needs, desires, and perspective of our membership" (*Vision and Data*, 2012).

The foundation of community—meaningful social connections—is a top driver for synagogue membership satisfaction.

Across the congregations, the top three drivers for overall satisfaction and personal growth of members (in order of relative strength) were (1) vision and values of synagogue that resonate with the members; (2) rabbi's vision of Jewish life that resonates, and (3) the development of meaningful social connections. As the data show, the foundation of community—meaningful social connections—is a top driver for synagogue membership satisfaction. How that translates programmatically is not straightforward, however. "We had tried social programming in the past but never got the turnout we hoped for, which led us to conclude (wrongly) that people did not want to make social connections through the Religious School," reported Barri Waltcher, vice president and chair of the Religious School Committee at Temple Shaaray Tefila. "A targeted follow-up survey to probe deeper about social connections … led to an 'aha moment' when we learned that

people do want to make social connections; they just do not want us to add new events to their calendars. When we realized that, we took steps to build socializing and community-building into existing events."

7. Get Out of the Box.

Organizations have invested deeply in (generally nonagile) physical spaces to house their programs. For example, some Hillels have raised millions of dollars to build first-class facilities—complete with gyms, rooftop areas for barbecues and sukkahs, and kosher cafes—yet program professionals are seeing far better results when they take their efforts outside those boundaries. In recent years Hillel has launched the Campus Entrepreneur Initiative and its sister program, the Peer Network Engagement Internship, which have affected student involvement in both Hillel activities and general Jewish life on campus both qualitatively and quantitatively. In these programs, Hillel hires "uninvolved Jewish students to engage...fellow students and advance their Jewish journeys together" (2011 Hillel Annual Report). These students work closely with a Senior Jewish Educator to guide their work, which takes them anywhere from coffee shops to soup kitchens to concerts. Although organizations often speak of "meeting people where they're at," too many tend to wait until they come inside their own four walls before enacting that mantra.

Social media, too, challenge the role of physical space. Although there is no substitute for face-to-face encounters, many social technologies offer worthy approximations or at the very least enable us to connect with more people more often in between our in-person connections. Several Reform congregations have begun live-streaming their services (http://blogs.rj.org/blog/2011/10/26/how_we_can_strengthen_the_refo/), opening up the communal prayer experience to those congregants who are unable to attend due to distance, health, or any number of constraints. Some congregations are using social media to augment traditional opportunities; for example, asynchronous, decentralized Torah study throughout the week, such as Rabbi David Levy's "social sermon" (http://njjewishnews.com/article/metrowest/rabbi-taps-into-social-media-to-write-new-kind-of-sermon). These models remind that, although technology is a powerful force, it is only with a thoughtful human touch that it truly comes alive to foster community.

Although technology is a powerful force, it is only with a thoughtful human touch that it truly comes alive to foster community.

8. Articulate an Epic Vision.

Jane McGonigal, game designer and author of *Reality Is Broken: Why Games Make Us Better and How They Can Change the World* (2011), writes about the importance of having an "epic" element to the games we play, which ultimately comes down to the human search for meaning:

We crave meaning, or the chance to be part of something larger than ourselves. We want to feel curiosity, awe, and wonder about things that unfold on epic scales. And most importantly, we want to belong to and contribute to something that has lasting significance beyond our own lives.

Games, McGonigal argues, provide that epic context, which is part of why they can be so engrossing and fulfilling. But the broader thesis of *Reality is Broken* is that gaming principles can—and should—be applied to real life to make the world a better place. The epic vision, therefore, is one of the key elements of the

platform organization. It is that immersive quality that binds the whole operation, providing a sense of meaning and purpose to the people who come in contact with it.

In *Tomorrow's Synagogue Today: Creating Vibrant Centers of Jewish Life* (2012), Hayim Herring outlines for his readers a fictional synagogue, Temple Torah, that has completely reimagined itself for success in the connected age. One of the first things that Temple Torah sets out to do is revise its ailing vision and mission statements. The redacted version reads as follows:

Temple Torah aspires to become a model of a perfected world. You are invited to participate in the temple on your terms, with others who seek to add meaning to their lives and the greater world by turning this aspiration into reality (Herring, 2012, p. 16).

Turning a temple into a "model of a perfected world" is truly an epic vision. Inviting individuals to contribute to that vision on their own terms makes a compelling call to action for this imagined synagogue-as-platform.

We are living in a very exciting time of change. This is not a time to tinker around the edges, hoping for profound impact. The change we observe today and predict for tomorrow necessitates a bold rethinking of the purpose, structure, and function of our communal organizations. Now is the time to think big, adapt thoughtfully, and design anew.

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Network Weavers

How to Weave Together Jewish Communal Life

Deborah **Fishman**

The idea that disparate individuals can come together to become something larger than themselves—whether you call it a tribe, a movement, a people, or a network—has been part of Jewish DNA for millennia. We intuitively understand that banding together gives us not only a practical support system to help us achieve our goals but also enables us to find meaning in life through striving toward shared values, dreams, and identity. For generations, Jewish communal professionals in particular have assumed a leadership role in imbuing this sense of togetherness and working tirelessly to create more synergy in our communities. It has been called community organizing; working with lay leaders and volunteers; facilitating groups; and engaging your alumni, young Jews, or other target populations. Now, there is an additional lens through which this work can be considered: network weaving, connecting others to human, informational, and financial resources, making each person more effective than they could be alone.

Although Jews have been building networks for a very long time, changing paradigms in technology and communication have profoundly influenced some of the rules of engagement. For instance, in the past, factors such as the geographic concentration of a constituency, one's position of authority, or access to an organizational framework were regarded as key to the success of a network or moment. Today, these factors may no longer be necessary at all. Instead, network weavers require the ability to seek out those who identify with one's cause, no matter where they are or when they can contribute; to develop personal, authentic, and give-and-take relationships with and among them; and to engage them in processes that are meaningful to them and move toward concrete goals. At the same time, especially as cultural norms around technology and communication continue to evolve, we are now beginning to see some codification of network-weaving practices, at least outside the Jewish world.

A year ago, I set out on a journey to understand the role of Jewish professionals who are acting as network weavers in this complex environment. What does the role of network weaver really look like in this context? Where are they stuck in executing their assigned tasks, such as engaging young Jews or building an alumni network? What are the challenges inherent in seeking to weave networks inside or amidst the landscape of Jewish organizations that may not have internalized the new way of engagement in their structure and culture? How and to what extent are they understanding—and making the case for—a more networked approach to engagement? Are there challenges and opportunities

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common to those operating in these positions throughout the Jewish organizational world?

I decided that the best way to delve into these complex questions was through adopting a networked approach myself. This meant developing a process by which anyone with productive information to contribute—or who knew someone who did—could get involved; where I could have detailed dialogue and develop relationships with each of them; and where I could share transparently what I learned for the benefit of others seeking to do this work and for the community at large. I interviewed more than 30 network weavers with positions as diverse as Director of E-Communities at the Lookstein Center for Jewish Education, Social Action Coordinator at JHub, and Chief Kehillah Officer at the United Synagogue of Conservative Judaism; 26 of these interviews are published on my blog, hachavaya.blogspot.com. Several were also cross-posted on eJewishPhilanthropy.com and in the network-weavers' organizations' blogs and newsletters. Most importantly, a form on my own blog allowed any reader the opportunity to contact me and share their own experiences.

I learned first and foremost that there are so many intelligent Jewish professionals passionate about their work—and about the opportunities that working during this time of new network-weaving paradigms can afford. Although there was some confusion of terms—What exactly is a network? How is it different from a community?—there was also an overwhelming feeling of identification with the concept of a network weaver as descriptive of their work, as legitimizing their work by virtue of its appellation, and as signifying that they must not be alone in doing it.

Through my process of discovery with this initial group whom either I identified or who identified themselves as network weavers, I realized the deep importance for the Jewish world of not just network weaving as a theoretical concept but also of the individual network weavers themselves. Their skills, personalities, and dedication were in many cases what was enabling their networks to take off and certainly greatly informed the ways in which they developed.

For Jewish communal institutions, the lesson is the importance of building internal capacity to work with networks to achieve their goals.

For Jewish communal institutions, the lesson is the importance of building internal capacity to work with networks to achieve their goals. This means having staff members who have the skills to be network weavers—and also who are given the necessary time and authority in which to perform this role well. Organizations may need to reexamine the staffing requirements for positions already engaged in this work, such as in communications or alumni relations, as well as to look at who may have a different formal role but who naturally keeps in touch with, convenes, and connects members, past participants, or other constituents. By making this aspect of the organization's work more explicit through examining who is doing it, what the goals are, and whether they are being achieved, the organization can better develop a focused strategy to improve results.

My network-weaving conversations led me to wonder whether a networked approach could be used not only to learn about this area but also to effect change in how it is practiced. I perceived two real opportunities to connect Jewish network weavers to information and to people in such a way that they could practice in a vibrant, collaborative, and, in short, a networked environment. First, because many Jewish organizations are just beginning to imagine what it would mean to operate in this way, it is necessary to go outside of the Jewish world where there

exists a wealth of academic theory as well as best practices from nonprofits and foundations. We can adapt this knowledge for the Jewish context instead of imagining ourselves in a vacuum. Second, there are many Jewish professionals working in similar roles—such as those I interviewed and many more—who would benefit tremendously from sharing best practices among themselves, thereby increasing their networks' connectedness and effectiveness.

Even as each Jewish organization is working to make itself strong and to build its own network, the Jewish community as a whole is a beautiful and complicated overarching network of all of these networks. In realizing the extent to which we all can learn from and concretely benefit from our interactions with the collective, there is much we can do together, such as building connections, sharing and unpacking information within and outside the Jewish context, and, in doing all of this, fostering leadership through the professional development of our network weavers.

HARESHET ("THE NETWORK")

In my role as Director of Communications for The AVI CHAI Foundation, a private foundation endowed by Zalman C. Bernstein, I am creating a laboratory for experimentation around how to bring these opportunities to life. In HaReshet, I will bring together selected AVI CHAI grantees from November 2012 to August 2013 to learn together about network weaving; develop and practice skills in a guided and reflective way; and benefit from sharing lessons from each other's work, including both challenges and successes.

In HaReshet, I want to bring alive a vision of network weaving not just as content to be learned but also as a viable structure explaining how and why organizations can embark on a journey of learning with and from one another. In the next section I outline this vision to explain how network weaving may be applicable to any individual organization's context as well as how we as a community will benefit from being woven together, with philanthropies especially well positioned to facilitate this role. This discussion focuses on three components that are both important to the design of the program and instructive to network weaving: the curricular units of the program, learning together, and network leadership within the context of holistic organizational support.

Curriculum: Learning About Networks

The lack of shared definitions of terms associated with network weaving, which I observed in the interviews described earlier and in other contexts in the Jewish world, can be a basic impediment to communication around its practices. Some agreement and awareness of precise definitions are essential to the Jewish community's recognition of network weaving as an important area of Jewish communal work and, conversely, to preventing it from becoming an overused buzzword.

Fortunately, we can turn to expertise outside of the Jewish world to provide a baseline for such definitions. June Holley, who has been working with networks since 1981, created the term "network weaver." In the Appalachian region of Ohio, Holley started a microenterprise network that enabled hundreds of small businesses to start and expand and mobilized dozens of local organizations to collaborate, self-organize, and create an environment so that those businesses

could work together. She directed the Appalachian Center for Economic Networks until 2005, when she retired. Holley recently wrote the *Network Weaver Handbook: A Guide to Transformational Networks* (2011) to share her expertise and guidance with network weavers everywhere.

In this handbook, Holley discusses both the terminology and the hands-on applications of network weaving. A network is simply any set of people connected by relationships. We all are in a multitude of networks, whether or not we think of them in that way; for example, networks of fellow alumni who went to our college or members of our synagogue. However, networks—particularly of the organizational variety—will not build themselves. Network weavers are those who assume leadership within a network to make sure it is well connected, active, and has other healthy network indicators. They may be paid to do this work, or they may simply be passionate about this group of people and want to connect others to human, informational, and financial resources, perhaps the same that others in the group have given them.

It is certainly true that individuals are perfectly capable, without outside help, of networking, of reaching out to connect with others in the network potentially of interest to them. But network weavers work in a very intentional and strategic way toward achieving certain goals, through activities such as building relationships, providing and facilitating a framework through which members can contribute, and mobilizing others to become leaders in the network as well. Although some are born "connectors," and innate "people skills" are indeed helpful for network weavers to have, other skills, such as moving relationships to action through a framework of facilitation and project management, can—and should—be developed. In this sense, a network has a different connotation than a community, which is also a group of connected people, but which is not necessarily working toward specific and concrete goals.

A network-weaver position affords a "bird's eye" view of the network because of the opportunity network weavers have to be in touch with many people in it. Therefore, a network weaver has an enhanced understanding of trends, needs, and strengths in the network as a whole. Equally importantly, the work requires an altruistic perspective, from which network weavers act not out of any one person's self-interest, but rather with the interest of the entire network in mind. Therefore, a network weaver can bring in the perspectives that will truly move forward the network's thinking—and action.

Network weavers are those who assume leadership within a network to make sure it is well connected, active, and has other healthy network indicators.

The curricular units of HaReshet, based on Holley's network-weaving handbook, are not only intended for learning about network concepts but also require hands-on work building a vibrant and sustainable network. Their implementation includes activities in which the network weavers engage the network, facilitate internal organizational conversations, and reflect personally on progress through self-assessment and through the construction of case studies.

Learning Together

For several reasons, HaReshet focuses not only on learning but also on applying the concepts of network weaving. First, this topic is very difficult to study on one's own—these are social networks, after all. It is necessary to experiment, share, and report back to truly begin to learn how networks work. Second, the cultivation of relationships is itself a central principle of a networked approach.

Finally, network weaving is an emerging field. Even though much has been written, tried, and discussed, practices continue to evolve and there are no easy answers.

In Judaism, the epitome of a peer relationship is *chevruta*, a traditional rabbinic approach to talmudic study. It entails partners studying together with an emphasis on challenging each other to analyze text and answer each others' questions, rather than rote memorization. Ovadiah Seforno, a 16th-century Italian rabbinic commentator, cites the following biblical verse in referring to the benefits of *chevruta* study (http://www.myjewishlearning.com/practices/Ritual/Torah_Study/How_to_Study_Torah/Havruta_Learning_in_Pairs_.shtml) : "Two are better off than one, in that they derive greater benefit from their efforts. For if they should fall, the one will raise up the other, as opposed to if one falls when there is no one to raise him" (Ecclesiastes 4:10–11).

HaReshet's design in which a cohort works through the curriculum together and each participant works with a designated *chevruta* partner reflects this principle. Matched by their experience with and vision and passion around network weaving, these *chevruta* partners discuss, challenge, and troubleshoot the participants' work toward specific goals outlined in a jointly produced work plan. Although they might also be labeled mentors, it is the idea that those with all levels of expertise stand to gain from learning together that animates the *chevruta* partner language.

Network Leadership Within a Context of Holistic Organizational Support

A final principle important to the program is that, although it is difficult for an organization to weave networks without having staff whose job function includes this task, it is also next to impossible for an individual to weave a network without having an organization or a cause around which to weave. Furthermore, just as network weavers need skills as individuals, their successes also hinge on the structure, functioning, and outlook of the organizations in which they reside.

The critical importance to a network's growth and success of a savvy network weaver armed with specific goals is reflected in HaReshet's two criteria to determine whether grantees are currently positioned to be successful in the program. First, the organization must conceive of working with a network as an important part of its mission, and its leadership must articulate what some of the goals of working with that network are or might be. Second, it has someone on staff with the job description, interest, and available time to devote to these network-weaving goals. The idea is to work with grantees for whom engaging constituencies in a networked way is currently on their minds and agenda—whether or not they are articulating it as network weaving. The goal of HaReshet is to build on the resources that organizations are already allocating and to maximize impact through professional development for network weavers. No monetary grants are being given to the selected grantees toward this work.

It is critically important that the work of the organization be tied into the work of the network weaver, and vice versa. Throughout the HaReshet program are opportunities to share learnings with colleagues internally, solicit their input and ideas, and otherwise benefit from their perspectives as to how the units are applicable to their particular organizational context. In addition, part of the *chevruta* partner's role is to consult with the network weaver about this specific

context and how the process can be tailored more specifically to fit his or her needs. This close integration recognizes that network leadership is not about one leader—the network weaver or anyone else—making all of the decisions unilaterally. Rather, network weaving recognizes the value of productively engaging the expertise of many from different perspectives and encouraging each to take leadership roles in his or her own right. Through this integration, the network weaver, together with colleagues, ideally can start to apply the lessons of working in a networked way to other parts of the organization internally, in addition to the external network.

No network weaver functions in a vacuum. There are informative lessons, examples, and opportunities for collaboration to be gained from dialogue with other network weavers, in other organizations, with differing levels of experience, and outside the Jewish context entirely. Even closer to home, it is critically important for network weavers to collaborate with colleagues to implement a network that suits their organization's context and can inform work beyond that external network.

THE ROLE OF A FOUNDATION IN NETWORK WEAVING

I am especially fortunate to have the opportunity to create the HaReshet experiment within my role at The AVI CHAI Foundation because foundations' unique position in a nonprofit landscape lends itself to network weaving in several ways. First, they have a bird's eye perspective of the fields in which they operate. As a result, they are positioned to identify trends and challenges in those fields, as well as to understand which players might have resources to offer others. Second, they are endeavoring to make an impact on their fields through tackling complex social challenges. Network weaving is one way in which foundations can take action based on their field-wide vantage point and work toward creating that change.

The AVI CHAI Foundation invests in a wide range of initiatives that further Jewish literacy, religious purposefulness, and peoplehood/Israel at Jewish day schools and summer camps. Although grantees are united around these three core values, they each represent a different path toward making them come to life. Given that AVI CHAI is sunsetting in 2020, it is especially important to the foundation that it leave a legacy of strong organizations that can consciously articulate and promote its values to future generations. It can create this legacy by bringing together these grantees who perceive themselves as operating in very different contexts and helping them understand the ways in which they are working toward similar goals. HaReshet may be the one place where some grantees can realize not just how to make each individual network more effective but also begin to think about how they are part of a bigger picture and how to enhance that greater whole.

Network weaving recognizes the value of productively engaging the expertise of many from different perspectives and encouraging each to take leadership roles in his or her own right.

Some of the ways foundations can work with networks, which HaReshet exemplifies, have been identified in the general literature, for instance in "Catalyzing Networks for Change: A Funders' Guide," by the Monitor Institute and Grantmakers for Effective Organizations (GEO):

- *Catalyst*: Establishing the value propositions of network-weaving through acting as a thought leader in this emerging area; setting a precedent for both how to support grantees and affiliates in this way.

- *Weaver*: Acting as a convener; helping grantees find new connections both for their individual networks to grow and between networks; and expanding the network to new participants. This helps all parties visualize the fields in which these grantees operate and contributes to their connectivity and development.
- *Assessor*: Diagnosing the network's progress and what it needs next, through documenting the functioning of different types of networks and the outcomes of different conscious strategies and decisions. In addition, writing case studies increases our understanding of network-weaving, its challenges, and its potential for success.

MOVING FORWARD

At its core, HaReshet provides those in Jewish network-weaver positions with professional development. At the same time, it does not just develop the network weaver but also fosters holistic support throughout the entire organization; beyond that, it can help the entire field to learn together. This progression serves to highlight our interconnectedness as Jewish professionals and as that quintessential network, the Jewish people. Although these principles of network weaving were gleaned from a general rather than Jewish source, they truly are applicable to our organizations and community and all we stand to gain from weaving a more vibrant Jewish people together.

HaReshet may serve as one opportunity to begin translating this theory into practice and to provide some much-needed documentation and data for this emerging field. Such data may help us begin to answer the following questions: What is realistic to expect for a Jewish organizational network's growth in this time frame? What metrics will be most useful to understand a network's growth, and which are not as helpful? How will different organizational and personal factors affect different networks' progress? How will having models of very intentionally and successfully operating networks in the Jewish world affect the conversation, understanding, and practice of network weaving, and where will they take us in the future?

The discovery and implementation of big ideas and bold solutions for the Jewish people require an awareness of how our organizations and our constituencies are already changing, together with a vision of how to not only respond to these changes but also to harness them to achieve new heights in Jewish engagement and vibrancy. Drawing on trends in communications, technology, and engagement both inside and outside of the Jewish world, network weaving may provide one way forward. At the same time, our knowledge base of how to harness networks in a Jewish communal context is currently in its infancy. I hope that embarking on this journey together with many network-weaving colleagues will enable us to better understand and realize the promise of Jewish network weaving and look forward to where it leads us next.

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Training Educators to Use Technology in the Jewish Classroom

Hana ***Bor***

Throughout history, the value of *kehillah* (community) has been a defining and necessary part of Judaism's survival. With the ever growing assortment of technological tools available to synagogues, schools, and agencies serving the Jewish community, our goal as a *kehillah* is to ensure that technology will enhance Jewish communal life, not replace it. We are at a crossroads where we must integrate technology into Jewish tradition and use this myriad of new tools to continue building our communities. The global Jewish community is moving into an aggregate society in cyberspace: a "community without propinquity" (Calhoun, 1998) that bridges geographic distance and allows participants from around the globe to unite in all aspects of Jewish communal life.

Technology is now a standard element of Jewish education not only in conveying information but also in enabling students to complete their assignments. Gone is the time when students were assigned simple book reports or presentations. Today, even in the primary grades, students are expected to make presentations using PowerPoint. SMART Boards are becoming regular classroom tools, and both students and teachers prepare interactive presentations to share with their classes. A short time ago, laptops were seen as tools to be assigned to students with special needs; today laptops and tablets have become requirements in many schools.

Day school websites are portals to parent-teacher communication, admissions, and fundraising. For instance, Baltimore's Krieger Schechter Day School uses SOIN ("Schools-On-I-Net") to offer up-to-date information about school programming, assignments, and grades. Teachers upload information for parents, who no longer have to rely on their children as reporters of their daily tasks. Parents track their children's homework assignment and classroom participation; they communicate directly with classroom teachers, who have time built into their day to log on, making teacher/parent accessibility greater than ever before. In addition, pictures of special activities and projects are posted on these password-protected sites, so that parents and grandparents can feel more connected to the program for which they are paying tuition.

Johns Hopkins University Professor Ralph Fessler sees the next 25 years as a time of dramatic transformation in education, largely because of technological advances—and he welcomes these changes. "Schools should continue to embrace technology not only as a source of information, but also as a vehicle for communication, networking, socializing, and experiencing simulations . . . that broaden students' experiences" (Fessler, 2009).

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OBSTACLES AND OPPORTUNITIES

Technology is expensive, making financial limitations the most obvious obstacle to its implementation. Because of advances in programming and devices, there is also the need to invest in frequent upgrades. Teacher training is another continuing expense.

Not everyone shares a vision of a wired classroom (Cepeda, 2011); some argue that technology is detracting from the educational experience. Equipment with poor sound or video quality, slow download speeds, frequent hardware failures, and outdated product licenses can waste valuable classroom time (Brinkerhoff, 2006). Financially disadvantaged families may have difficulty accessing the Internet and e-mail; those with disabilities (particularly visual impairment) also need expensive adaptive technology to upgrade ordinary computer systems. These programs consume large amounts of virtual memory in the computer, necessitating the need for the latest models.

Even simple technology such as PowerPoint is meeting with some objections by professionals. Although educators find it to be a useful tool in presenting large amounts of information to a group of learners, many students see PowerPoint presentations as the filmstrips of the 21st century. The American Historical Association advises history teachers to remember that "PowerPoint is a tool; that less is more, and to keep it simple" (Flamm, 2008).

Another concern is the element of distraction that technology introduces into the classroom. If the entire class has cell phones that allow texting, surfing the Internet, and playing games, then classroom management becomes more difficult. One Religious School dealt with these challenges by designing assignments that require students to use cell phones as learning tools. To level the playing field, students worked in groups so if someone did not have a phone, he or she was still included. Activities included a scavenger hunt throughout the synagogue facility, during which students used snapshots to decipher clues. They texted other team members, and in the end, all the pictures were uploaded to a website that captured the activity for the entire school. Innovation and creativity turned a challenge into an opportunity.

Using technology as a teaching tool therefore requires projects that engage students in the lessons, whether the activity takes place in the physical or the virtual classroom.

Using technology as a teaching tool therefore requires projects that engage students in the lessons, whether the activity takes place in the physical or the virtual classroom. Educators must go beyond duplicating written materials into electronic form, which may only have the effect of distracting students: They must attract students' involvement by creating activities that foster interaction.

A HYBRID BOLD SOLUTION: THE INSTRUCTIONAL LEADERSHIP INSTITUTE (ILI)

Jewish teachers need instructional leadership training and professional development. They also need to be trained in using technology so that it becomes a "a tool towards learning, and must not be the endpoint of learning" (Hoare, 2009). The Center for Leadership in Education at Towson University in Towson, Maryland, developed the week-long Instructional Leadership Institute (ILI) to merge those two areas of training. It is a hybrid course beginning with a face-to-face (F2F) seminar peppered with medium- to low-tech applications (i.e., PowerPoint, screen projections) and concluding with an online component based around BlackBoard® lessons, online cafés, and webinars.

More than 40 Jewish educators including principals and teachers, from a broad spectrum of schools in Maryland and New York—including day schools, religious schools, and early childhood centers—participated in the 2012 ILI; Modern Orthodox, Centrist-Orthodox, Chabad, Conservative, and Reform movements were represented. In the week-long professional learning community, they connected and networked with colleagues with whom they would not ordinarily interact.

The theme of the ILI was the seven "*C*'s" of instructional leadership: *C*ontinuous Improvement, *C*ulture, *C*ollaboration, *C*oaching, *C*aring, *C*hange, and *C*ommunity. Viewing their schools and goals through this lens, participants focused on critical evaluations of their school's vision and mission, examined their approaches to caring in the classroom, collaborated on action plans, and identified the components of professional development that contribute to successful change in their schools.

All of the ILI lessons used technology to enhance the learning experience while also modeling ways in which it can be incorporated into the classroom in a meaningful and engaging manner. The initial ILI concentrated on low-cost technology with which many of the educators were familiar.

The use of discussion boards, along with e-mail, fostered interaction and the sharing of information. Discussion boards are the virtual equivalent of a face-to-face exchange of ideas. They are generally closed – that is, only members (or in this case, ILI participants and panelists) may participate in the discourse. A host—an instructor or student—posts a topic of interest to which others may respond. A thread is generated that is saved online for future reference and can also be uploaded to a hard drive or external drive.

For example, the theme for the third day of ILI was "Continuous Improvement," which covered data collection for use in instructional decision making. The online discussion board on data collection offered participants the opportunity to review additional material on the subject, reflect on their notes from Day 3, and follow up with personal experiences and current practices in this area.

Discussion boards are the virtual equivalent of a face-to-face exchange of ideas.

The ILI modeled how discussion boards could be used in the classroom to broaden students' interactions and ability to engage people they might not otherwise have met on subjects and points of view they might not have considered. Their use also challenged educators to experiment with how to control or influence student interactions and how to teach students the implications and practices of personal responsibility in wide-open interactive environments.

One of the highlights of the ILI was the Privilege Walk, an exercise that enables participants to explore the intricacies of social upbringing. A series of 30 statements are projected onto a big screen and read aloud as well, giving both auditory and visual learners equal access to the information. In response to statements about family history, values, and socioeconomic status, participants express their relevance to them by moving forward or back from a central starting point. Statements covered a broad spectrum of ideas, including personal experience with anti-Semitism and bigotry, immigration status, academic achievements, and extracurricular interests. A post-Privilege Walk discussion centered on the themes of community and caring, and the results were recorded for inclusion in a PowerPoint presentation.

Another exercise engaged participants with considering the implications of a "Cultural Iceberg" (Hall, 1977). The portion of the iceberg above water

displayed observed behaviors such as bullying, sarcasm, or clowning in the classroom. The underwater portion asked participants to list what other conditions might contribute to the observed behaviors, such as hunger, illness, or absentee parenting. This exercise helped participants see their classroom and community with a more detailed view and to consider what their colleagues and students are bringing to school. Throughout the ILI, an interactive Cultural Iceberg appeared on the BlackBoard, where ILI participants could continuously add new observations and notions, with an eye toward troubleshooting classroom issues as they arise.

Using technology heightened the power of these exercises by enabling participants to share their ideas more easily. The exercises helped create immediate communities, encouraging members to reflect on group dynamics, individual identity, and behavior. Educators benefit from establishing communities of practice through which they can collaborate on academic advances and improvements (Solomon 2010) and reach out to involve their greater communities of parents, students, and neighbors. The use of technology during the ILI thus supported the exploration of one of its key questions: Do you still hold by your previous definition of community or has your definition changed, and if so, how?

The ILI used survey tools to elicit participants' questions and gather their feedback for both an overall analysis and of specific individuals' responses. Part of the registration process included taking an online Belbin® Self-Perception Survey, which assesses those team roles that the individual prefers playing. Based on this data, the ILI participants were assigned to teams to complete tasks during the week.

Each day of the ILI ended with a brief set of survey questions. Feedback was analyzed for presentation the following morning in a PowerPoint recap. The purpose of the surveys went beyond gathering praise; we collected ideas, comments, and requests for elaboration; for example, one participant asked for more clarity on an activity that provided "a lot of information without enough process."

Following the successful F2F weeklong learning experience, ILI participants are continuing to take part in an online asynchronous discussion (OAD), which allows them to continue the discourse with the ILI faculty through blogs, an educational Wiki, and webinars. Topics covered during the ILI were conceptual and abstract; through OAD postings and correspondence with educational mentors, those abstract notions are brought to life.

CONCLUSION

As part of the ILI, participants completed a technology survey to assess their current use and proficiency across several technological domains. The overwhelming majority of participants rated themselves as having moderate to expert levels of knowledge in the use of cell phones, e-mail, PowerPoint, and popular websites such as Facebook and YouTube. In contrast, the majority reported limited or no knowledge in using newer, more "complicated," and interactive resources such as Blackboard, Skype, Oovoo, WebEx, Wikis, Google Groups, and Google Hangout. Nearly all participants expressed interest in learning new technologies, though most were unsure of which ones would be the most useful to incorporate into their educational roles, probably due to their lack of exposure to these

programs. A substantial number were unsure or did not believe that a greater use of technology would be beneficial to their professional roles.

This is where school administrators must step in, to embrace and inspire this eagerness to learn new technologies, decide what areas of technology would be the most useful in their learning environment, provide necessary resources and training, and demonstrate how technologies can positively contribute to the Jewish education community.

Jewish educators can apply technology to Jewish education in a holistic manner whether they see themselves as leading or responding to these technological demands. As Jewish educators we are contributing to a new generation of practicing and believing Jews. We are also driving student achievement across the board. The skills that our students develop in the Jewish classroom carry over to their secular pursuits. Therefore, adding technology not only enhances the Jewish classroom: it reaches students wherever they are—making every moment count.

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Re-envisioning Aging through Asset Building and Collaboration

Renée ***Dain*** *and Michael* ***Hoffman***

Jewish institutions are not alone in struggling with today's battle of tough economic times; organizations across the nation are facing limited resources and are working hard to find the mechanisms to meet the growing demand for services and expand their reach. The Jewish community can no longer afford to work in a vacuum to address emerging social and human service needs; there simply are not enough resources to meet the demand. Through collaboration with other nonprofits, faith-based organizations, and grassroots groups we can more effectively tap into a collective group of expertise, strengthen our ability to secure new resources, and achieve greater social impact. Although some components of service delivery are "uniquely Jewish," we also have to recognize that much of what we do is also "generic."

This article describes how the Baltimore Jewish community is embracing consumer-directed care by tapping into the assets of the Baltimore Jewish community and community at large to develop new grassroots initiatives with support from the Jewish community infrastructure. This approach is re-envisioning aging services to better meet the growing and diverse needs of older adults, one of the priorities that emerged from the 2010 Baltimore Jewish Community Study. The Associated: Jewish Community Federation of Baltimore is serving as a community convener to leverage community partnerships and develop broad-based coalitions both from within and outside the Jewish community to drive our senior agenda, and advance communal priorities. As a result, the naturally occurring retirement communities (NORC) model is being phased out and replaced by a new model—the Supporting Community Network—that incorporates grassroots culture and draws on aspects of the village movement in the United States and of supportive communities in Israel.

Although some components of service delivery are "uniquely Jewish," we also have to recognize that much of what we do is also "generic."

SERVING THE AGING "BOOMER MARKET"

It is no surprise that one of the greatest demands facing society in general and the Jewish community in particular is meeting the needs of the growing number of older adults—specifically, the large Baby Boomer population reaching elderhood—and the lack of adequate and appropriate infrastructure and services to meet the need. According to the Pew Research Center, "for the next 19 years 10,000 people will 'cross the threshold' every day; this means that the 79 million baby boomers, about 26% percent of this country's population, will be redefining what it means to be older and placing greater demands on the social safety

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net" (Barry, 2011).The burgeoning aging population in the United States has led to the proliferation of new aging services providers that are seeking ways to support and/or profit from serving the growing numbers of elders. The challenge, however, for organizations and "companies considering the boomer market" is that they "must grapple with a powerful dichotomy. On the one hand, this group has enjoyed more opportunities than any other generation in US history" and "on the other…research indicates that many are anxious, frustrated, and more concerned about their future than were the members of previous generations" because "only about a quarter of boomers are financially prepared for their twilight years" (Court, Farrell, & Forsyth, 2007).

A recent AARP survey found that nearly 90% of respondents aged 45 and older plan to stay in their current residence as long as possible. Aging services providers will need to explore new ways to aid older adults who wish to age in place in the community and to do so in a way that will not compromise their well-being. What better way to accomplish both goals than by allowing seniors to choose the services and programs they want? Consumer-directed services are based on the principle that consumers have the right to decide who should provide their care, when the care is needed, what help they need, and how much responsibility they want in directing their own care. And although consumer-directed care may not be for everyone, research has shown that it is an effective method to help older adults age in place. According to a study conducted by the National Resource Center for Participant-Directed Services of Boston College, programs such as Cash and Counseling, which promotes consumer-directed care, had a positive impact on consumers' quality of life, improving physical health and emotional well-being while reducing state health care expenditures: "Fewer emergency room visits represented reduced care cost to the state," and "family members also benefited especially by decreased level of reported stress" (Norstrand et al., 2009).

So what does this mean for service providers? For the Baltimore Jewish community, it means that we need to explore new models of service delivery that involve the consumer and that reach a broader audience because aging does not discriminate by denomination, income, or neighborhood. Those with means and those without, Jews and non-Jews, all of us will reach a point in our lives where we will need the support of a community to help us age with dignity.

REIMAGINING THE AGING-IN-PLACE SERVICE MODEL

In 2011, The Associated embarked on a strategic planning process to reimagine our aging-in-place service model. The launch of this process was spurred by four concurrent events: the completion of the 2010 Baltimore Jewish Community Study, the economic downturn, the demographic explosion of the baby boomer population aged 46–64, and the challenges of funding and sustainability faced by our NORC and Senior Friendly Neighborhoods (SFN) Program.

The planning process began with an analysis of the relevant data and trends outlined in the 2010 demographic study, as well as an evaluation of existing programs and services. Simultaneously, our leadership felt that it was important to learn how non-Jewish providers were serving the needs of older adults and to identify ways in which those key organizations might work together with agencies of The Associated to meet the growing needs of older adults in Baltimore and,

in the process, help re-envision the aging-in-place service model. Recognizing that we were not alone in this challenge of how best to serve older adults, the leadership helped put together a blue-ribbon think thank of senior professional leaders from the following organizations: Associated Black Charities; Association of Baltimore Area Grantmakers; Baltimore Community Foundation; Catholic Charities; Easter Seals; Erickson Living Foundation; Erickson School on Aging at the University of Maryland-Baltimore County; Johns Hopkins Center on Aging and Health, School of Nursing, and School of Medicine; Towson University Gerontology Program; and the University of Maryland School of Social Work.

Although each organization has its unique mission, vision, values, and established set of goals, we realized that we all shared a concern for and appreciationof having elders remain in the community. It became clear that we needed to develop a platform for a community-based dialogue about how to establish public/private partnerships to advance aging services. The result was the creation of the Baltimore Senior Life Leadership Summit, a day-long opportunity for key stakeholders—providers of aging services, funders, advocates, policy leaders, and regionally based representatives of public and private organizations that address the preferences and needs of older persons as part of their scope of services—to come together to begin a dialogue on the most pertinent issues facing our community.

This ground-breaking Senior Life Leadership Summit was an important first step toward working together and exploring these issues as a shared priority. Roundtable discussions were held on the following topics: transportation—making community involvement accessible; service coordination and management in affordable and/or public housing communities; linking older adults to benefits and services—the concept and practice of community-based service coordination for older adults; civic engagement, wellness, and life-long learning for older adults; and ensuring economic security through encore careers, retirement planning, financial literacy, and the greater use of public and private resources. More than just a sharing of best practices, these discussions provided the opportunity for organizations to identify potential solutions on how to improve the access, options, and experiences of Baltimore's older adults. The transportation roundtable, for example, gave organizations who already worked together the time to identify improvements to the existing system, as well as the opportunity for others to dream about new collaborations that might result in a community-wide approach to transportation. The Associated agencies are currently exploring how they might partner with some of these organizations to establish more efficient, affordable, and flexible models of transportation than what is currently in place.

The Summit keynote speaker, James P. Firman—president and CEO of the National Council of Aging—emphasized the importance of collaboration and taught participants tools and strategies for building and sustaining partnerships. Dr. Judah Ronch, dean of the Erickson School at the University of Maryland-Baltimore County, who moderated the Summit, urged participants to work together and to realize that "our goal as a community must be to weave all of the separate pieces and programs, current and future, into an ecosystem in which people can flourish as they age. Our community has to work in a synergistic manner to identify and mobilize our strengths in order to age well."

BENEFITS AND OBSTACLES TO COLLABORATION

According to Firman (2011), although agencies may recognize the benefits of collaboration, they may be reluctant to work together because they hold the following perceptions: (1) We are competitors because resources are scarce and it is a zero-sum game; (2) we are competitors because we provide similar services or programs or target a similar population; (3) our organization needs or desires to maintain its identity and "get credit"; (4) trying to collaborate consumes time and resources and is often of limited value; and (5) we get mixed messages from our donors.

Firman recommended that agencies reframe their thinking and offered three strategies for moving collaborations forward: (1) begin with strategic clarity, (2) think and act abundantly, and (3) master the science and art of collaboration. Strategic clarity is achieved by first asking questions such as the following. What is the organization deeply passionate about? What is its mission, vision, values, and goals? What does it do best? Knowing the answers to these questions gives a better sense of what the organization can bring to the table. The website, www.chartingyourimpact.org, provides a helpful resource in enabling organizations to better understand their mission.

Thinking and acting abundantly are essential because all too often organizations decide not to move forward because they believe there are not enough resources. Very often this is a short-sighted view. One of the most overlooked resources is human capital. In meeting the needs of elders, Firman suggested that—in addition to assets such as consumer disposable income, Medicare and Medicaid reimbursement, and grants from corporations, foundations, and government grants—organizations consider the assets that other agencies and individuals (e.g., older adults) can bring to the table.

Another way to "think and act abundantly' is to take an asset-based approach, which is "a growing movement that considers local assets as the primary building blocks of sustainable community development…. Building on the skills of local residents, the power of local associations, and the supportive functions of local institutions, asset-based community development draws upon existing community strengths to build stronger, more sustainable communities for the future" (http://www.abcdinstitute.org). This approach was developed by the Asset-Based Community Development Institute (ABCD) at Northwestern University.

Mastering the art of collaborations requires "a common agenda, shared measurement systems, mutually reinforcing activities, continuous communication and background support" (Kania & Kramer, 2010). Laying the groundwork takes time and commitment, and collaborations and partnerships require continuous nurturing. The roles of each partner need to be defined, and all parties need to be accountable, but at the end of the day, someone needs to take responsibility for ensuring that the partnership is being maintained and managed effectively. "Coordination takes time, and none of the participating organizations has any to spare. The expectation that collaboration can occur without a supporting infrastructure is one of the most frequent reasons why it fails" (ibid.). Ideally that person is someone separate from the participating organizations who can "plan, manage, and support the initiative through ongoing facilitation, technology and communications, etc" (ibid.). However, if that is not feasible, that individual can

"The expectation that collaboration can occur without a supporting infrastructure is one of the most frequent reasons why it fails."

be someone whom all organizations agree is the appropriate person to take on this responsibility and is given support from the leadership of his or her own organization.

DEVELOPMENT OF THE SUPPORTIVE COMMUNITY NETWORK

These important lessons and the realization that consumer-directed service is a trend that community-based organizations cannot ignore motivated our decision to develop a new initiative that would more effectively enable seniors today and in the future to remain in their homes and communities for as long as possible. A 30-member Senior Life Task Force, including several members of the think tank, as well as lay and professional leaders from Jewish and non-Jewish organizations in Greater Baltimore, was created and charged with the design of this new model. After analyzing data, trends, and existing models of service delivery in the Baltimore Jewish community, the Task Force decided to focus on two innovative models: supportive communities in Israel and the village movement in the United States.

JDC-ESHEL (the American Jewish Joint Distribution Committee) is responsible for the development of the supportive community model in Israel. It initiated this community-based program together with Israel's Ministry of Labor and Social Affairs, in cooperation with local associations for the elderly, municipalities, and private organizations. The program provides medical services (physician house calls and an ambulance service), an emergency call service, home repair, social support, and recreational activities. At the heart of the model is a neighborhood facilitator, called a "community father," who regularly interacts with members of the community by providing simple home repairs and social support. He or she is trained to respond as a community connecter when a member of the community is in need of additional services. The program is also intended to encourage volunteerism among its members to build community. An example of how this model has been implemented in the United States is the "Help at Home" service at the Kansas City Jewish Family Services.

The village movement originated as a grassroots effort in Boston's Beacon Hill neighborhood in 2001 when a group of neighbors came together to develop services that would enable older adults to remain in their home and community. Since then, it has been replicated around the country; there are currently more than 60 villages across the country, with another 120 or so in development. The basic tenet of the village model is that it is a membership-based model, in which neighbors help neighbors to live in the comfort of their own home surrounded by the ones they love—friends, family, and community. Typically services are provided by members or other volunteers, and when this is not feasible, members are referred to vetted, often discounted vendors. This model is primarily being implemented by grassroots communities; however, organizations such as hospitals, continuing care retirement communities, and social service providers are developing similar models and are all a part of the Village-to-Village Network, a national organization that supports local villages.

These two models sparked the Task Force's interest in creating a hybrid model: the Supportive Community Network. This new model embraces both consumer-directed services, promoting a grassroots model to aid older adults in their quest for support to age in place, and the infrastructure of the Jewish

community and community at large, which can offer an array of needed professional support services.

The Supportive Community Network (SCN) was launched in February 2012 and is being run under the auspices of CHAI (Comprehensive Housing Assistance, Inc.), an Associated agency that develops and supports thriving, stable communities in neighborhoods with a substantial Jewish population in northwest Baltimore. Currently, SCN is helping northwest Baltimore residents organize the first of several supportive communities (also referred to as "villages"). A professional community organizer hired and supervised by CHAI serves at the SCN director responsible for getting each new community off the ground; a stipend community volunteer, who is a member of the community, serves as the Village Liaison working with the SCN director to organize the village.

Essential to the development of the first village was the community organizing process put in place by the SCN director. At the heart of this model is leadership development, which is not an organic process, but rather an intentional one: Instead of the most likely leaders rising to the top, the director invests resources and time into every member to build leadership and broad ownership of the project. What is unique about SCN as opposed to other villages is that the SCN director ultimately is not responsible for running the village, but rather for developing the leadership and infrastructure to sustain itself. Once the village is fully operational the SCN director will provide continued support, but the focus will shift to establishing a second village.

SCN's first village currently under development, Northwest Neighbors Connecting (NNC), was established through cooperation among the SCN director, the SCN Advisory Board, the NNC Village Liaison, and an initial group of 30 interested members. Community organizing techniques were implemented to identify and cultivate potential members, leaders, and volunteers living within the defined catchment area in Northwest Baltimore. The core of 30 members has grown to more than 80 individuals (baby boomers, seniors, and even a few young adults), thereby facilitating the development of NNC. The participants, soon to be paying members of NNC (sliding scale of $5– $50 per month based on the ability to pay), have established subcommittees responsible for coordinating services, developing partnerships, advocating for other members, providing intergenerational experiences, holding social events, managing finances, and establishing membership fees, as well as planning a launch event. A board of directors is currently being established and the launch event is planned for mid-March 2013. In addition to the 80-plus future paid members of the village, NNC has worked to identify more than 100 volunteers to fill the future needs of the village.

The SCN director ultimately is not responsible for running the village, but rather for developing the leadership and infrastructure to sustain itself.

The first services to be offered by NNC is the coordination of volunteer-run transportation services and telephone reassurance. Other services that will soon be offered by members of NNC or other volunteers living within the catchment area include home repairs and modifications, computer assistance, friendly visits, food shopping, and the development of contracts with local service providers to address needs that members or other volunteers cannot meet. The Supportive Community Network's role will be to provide consultation on village development, leadership development, and volunteer recruitment and training; facilitate coordination with service providers; and handle "back office" functions such as resource development and fiduciary oversight.

Contributing to the success of the Supportive Community Network will be the partnerships it is forming with neighborhood groups and associations, schools, synagogues, churches, Jewish agencies, and other providers of services throughout Northwest Baltimore. Some examples of these collaborations include working with schools to provide reciprocal services between students and seniors, co-hosting Sukkah Tours with neighborhood associations, and engaging city agencies (e.g., the Community Emergency Response Team) to train village members in emergency preparedness. To increase diversity among its membership, SCN and NNC are working with the African American members of NNC to partner with local church leadership to identify opportunities for outreach and exchange of services. In addition, NNC has developed partnerships with local senior buildings and condominium boards to bring events to their buildings, with the goal of increasing membership and exposure for NNC and improving residents' quality of life. Within the national Village to Village Network, a national organization that provides support to villages throughout the country, the SCN director has created a working group to address the needs and challenges of villages that engage low-income communities.

Partnerships on the horizon include working with hospitals that are looking to reduce readmissions and social service providers that can provide a deeper level of support to help village members age in place. It is important to note that timing is an essential strategy for partnership. If one's infrastructure is not adequate to sustain the partnership, it is necessary to hold off on forming that alliance. SCN and NNC plan to embrace Firman's recommendations for advancing partnerships, but only when the timing is right. "The more we expand our imaginations for collaboration, and the more organizations we bring in to add new aspects to NNC, the more attached our community members feel to the model and each other," observes Lane Levine, the SCN director for northwest Baltimore. "Every time we introduce a new collaborative opportunity, our members say, 'Now THIS is the heart and soul of the Village.'"

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The Foundation for the Jewish People

Its Role in the Future of International Jewish Philanthropy

Stephen G. ***Donshik***

In 1929 the Balfour Declaration called for "the establishment of a Jewish agency" to further the development of a homeland for the Jewish people. The Jewish Agency for Israel (JAFI) was founded in response to that call. Since its founding, JAFI has metamorphosed into an international Jewish organization based in Israel with professional staff and board members living all over the globe. Its accomplishments certainly deserve to be heralded. However, the time has come for the Jewish Agency to reengineer itself to meet not only the present needs of the Jewish people but also to provide an infrastructure for responding to their future needs. This article proposes just such a reengineering through the creation of a Foundation for the Jewish People.

JAFI: INCEPTION AND GROWTH

In its early years, JAFI in many ways was the "government without a country," administering essential services such as education and health care to the incipient state. In developing the country's physical infrastructure, it was largely responsible for the growth of the Jewish presence in pre-state Palestine (Stock, 1988).

Since its inception, the Jewish Agency has also been a leading force in bringing millions of new immigrants to Israel from around the world. During World War II, JAFI operated clandestine operations in several European countries and rescued Jews from the Holocaust. After the establishment of Israel, it saved Jews from persecution in North African countries, and more recently, it facilitated the immigration of more than a million Jews from the former Soviet Union. It continues its work today by facilitating the aliyah of Ethiopian Jews. Alongside these efforts to provide a safe haven for Jews facing persecution, JAFI has made it possible for those in Western democratic nations who choose to live in Israel to settle in the Jewish state.

Over the years, JAFI has gone through several transitions in response to the emerging needs of Israel and the Jewish people. From the 1930s to well into the latter half of the 20th century, it established dozens of agricultural communities in the *yishuv* (pre-state Palestine). In the 1950s, after the establishment of the state, the agency built schools and community centers throughout the country through its Israel Education Fund. Then it spread its wings even further: Following Prime Minister Menachem Begin's call for a new partnership between Israel and the Jewish communities around the world, it created Project Renewal, in which Israelis and Diaspora leaders worked together to confront issues facing socioeconomically challenged communities in the Jewish state.

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About 25 years ago, JAFI stepped into the void that was created with the emergence of a new generation of young Jews who seemed to lack a connection to Israel and a strong sense of their Jewish identity. Mort Mandel, a well-known Jewish communal philanthropist and volunteer leader, and Seymour Fox, *Z"L*, a professor of Jewish education, joined forces to lead the Committee on Jewish Education; this work led to a new focus for JAFI: strengthening the Jewish identity of young Jews around the world and their relationship to Israel. Out of the discussions and research efforts spearheaded by this group sprouted Birthright, an innovative program sponsored by the government of Israel, the Jewish Federations in North America, and private philanthropists that provides young adults from Jewish communities around the world with an all-expenses-paid trip to Israel to strengthen their connection to Israel and the Jewish people. Also among JAFI's efforts in this area was a program that sent Israeli emissaries to communities around the world to work with young people, teach in their schools, and serve as counselors in Jewish summer camps; JAFI also published books, pamphlets, and educational materials (JAFI, 2005).

The uniqueness of JAFI lies in its governance structure: It is responsible not only for raising funds to meet the needs of the Jewish people both in Israel and around the world but also has the difficult task of allocating those funds. Leaders from around the world sit on its board of directors, a very precious characteristic of this historic institution of Jewish life.

Today, however, JAFI finds itself at a crossroads. Once again, it must redefine its purpose, as it has done over the last 25 years in an attempt to reengineer its purpose and function in the Jewish world. The core of the issue is this: To what extent should JAFI be involved with providing direct services to meet the present and emerging needs of Jews today? Is this type of involvement really necessary to accomplish that goal, or could it best meet those needs through a different organizational structure that is more appropriate for 21st-century Israel and Jewish communities around the world?

JAFI must now refocus its resources ...to take advantage of its unique governance structure without the burden of a staid infrastructure.

There is no longer a need for JAFI to implement programs that could be outsourced to innovative and creative organizations. It must now refocus its resources in a way to take advantage of its unique governance structure without the burden of a staid infrastructure that does not always respond to the need for innovation.

THE FOUNDATION FOR THE JEWISH PEOPLE

JAFI's uniqueness lies in its global representation on its board of directors. Chinitz, in *The Common Agenda*, describes the development of the agency's globalization, and he captures the unique role Max Fisher played in bringing the leadership in Israel together with the Jewish leadership of communities around the world (Chinitz, 1985). This structure enables JAFI not only to provide a forum for the discussion of issues confronting Israel and the Jewish people but also to respond to identified needs. It should be preserved but redeveloped in a way that is more appropriate for supporters, partners, and those who receive its services.

While retaining the present representative governance structure, JAFI should be reengineered into the *Foundation for the Jewish People*. It would shift from an organization that owns and operates programs to a foundation that

provides direct funding to nonprofit organizations in Israel and around the world so that they might implement their own programs. In some cases, it would fund existing organizations; in other cases, the foundation would provide the initial funding for establishing a nonprofit if there is no instrumentality to provide those specific services. The foundation would have the flexibility to determine when it would act as an initiator of an organization and when to provide funding to support an established program.

The Governance Structure

The structure of the Board of Governors would essentially remain the same, composed of both representatives of Jewish communities around the world and Israelis who represent various sectors in Israeli society. New board members would be recruited who understand the new purpose and function of JAFI. They would be expected to lend their political and financial support to the redeveloped board. The board would focus on the development of the foundation's policies, the identification of potential board members to represent Israel and the Jewish communities around the world, and the creation of new financial resources from the member communities.

The board members would sit on committees that parallel the three departments (governance plus the two described later), with each committee in charge of a department. Subcommittees would be responsible for specific areas that the Research Department identifies and to which the Department of Grants and Allocations would allocate funds.

The committees would include delegates from around the world, maintaining the global character of the present agency. As representatives of the global Jewish community, they would be uniquely suited to confront the challenges that communities in Israel and around the world presently face. Through their participation in the foundation and the programs it will fund, they would serve as a beacon for Jewish peoplehood.

In addition, the existing JAFI-Israel Government Coordinating Committee, which brings together JAFI's senior professional and volunteer leadership with representatives of the Israeli government, would be integrated into the new structure and would continue to play an advisory role. However, when there were joint JAFI–government funded projects, as in the case of Birthright or Masa (a one-year long-term Israel educational program), representatives of the government could be asked to serve on a committee allocating funds or monitoring the project. Thus, in addition to facilitating ongoing communication between the government and the members of the Foundation board, this committee would identify when it is appropriate to encourage the government of Israel to continue to be a funding partner.

As representatives of the global Jewish community, they would be uniquely suited to confront the challenges that communities in Israel and around the world presently face.

Research Department

The Jewish People Policy Institute (JPPI), an independent professional policy planning think tank now incorporated as a private nonprofit company in Israel but founded by JAFI, would be an integral part of the Research Department. According to its website, JPPI's mission "is to ensure the thriving of the Jewish People and the Jewish civilization by engaging in professional strategic thinking and planning on issues of primary concern to world Jewry."

Because the JPPI was founded by JAFI, it would be appropriate to redefine its mission in line with JAFI's new mandate. It would be charged with providing the background research and information on the challenges faced by Jewish communities around the world and in Israel. Its function would be expanded to not only conduct and coordinate research studies but also to develop possible responses to the issues it identifies as crucial to both the present situation and the future of the Jewish people.

The Research Department would be responsible for analyzing data and developing policy statements based on its understanding of existing conditions in various Jewish communities. It would focus on providing all of the background information necessary to substantiate the communities' concerns. It would carry out studies in individual communities to document each issue and, when appropriate, to develop quantitative or qualitative analyses.

Department of Grants and Allocations

The Department of Grants and Allocations would be responsible for developing an allocations process for providing grants to nonprofit organizations and subsequently monitoring the grants. It would allocate the grants on the basis of the needs and issues identified by the Research Department, thereby supporting voluntary organizations in local Jewish communities, which have a unique understanding of their specific issues, and enabling them to meet local needs effectively.

The allocation of funds to local communities also has the potential to leverage funds from local donors who may not be supporting their local community campaign for overseas needs. There is also an opportunity here to develop challenge grants; for instance, the agencies might be required to seek out additional donors to maintain the funded programs.

To illustrate, let us examine the services provided to potential new immigrants from the United States, Canada, and England, particularly to young adults who emigrate without their families and then serve in the Israel Defense Forces through the Lone Soldiers Program. Presently these services are being outsourced to a nonprofit, Nefesh B'Nefesh. It was a difficult decision for JAFI to outsource aliyah promotion, but after a lengthy process of negotiation with Nefesh B'Nefesh, it became apparent that the nonprofit could provide the services more effectively and efficiently. It was also able to raise funds to support its services and supplement its allocation from JAFI.

Replicating this model would encourage more local nonprofits to become involved in Israel-related activities. The communities that provide the services would be more connected to Israel and be more willing to assist with other issues that are of concern to the Jewish people.

The Department of Grants and Allocations would address other areas of concern, such as Jewish identity, Jewish camping, Jewish education, Israel experiences, and people-to-people programming. Of course, there are many existing organizations that have implemented programs in these areas. Birthright, whose focus is strengthening Jewish identity, is a model of outsourcing to a nonprofit agency that has been successful in both implementing its programs and in raising funds from committed donors.

In addition to outsourcing to other nonprofit agencies, a number of JAFI programs could be transformed into independent nonprofit organizations. JAFI's

Partnership2Gether program promotes the connection between Israel and Jewish communities around the world. It is described on the JAFI website as

> an extraordinary global platform connecting some 550 communities around the world in 45 partnerships…building living bridges among these communities. Sharing ideas, strengths, challenges and models of success; and empowering BOTH communities to generate waves of change. But the impact of these projects go far beyond the community level—each of us has the opportunity to become directly and personally involved.

There is no reason that this program cannot become an independent nonprofit that receives allocated funds both from the Foundation for the Jewish People and also from partners in Israel and the Jewish communities connected to the program.

Another example is the Youth Futures Program, which is also described on the JAFI website:

> The Jewish Agency's Youth Futures program empowers disadvantaged Israeli youth, providing them with an equal opportunity to develop their academic and social skills. Youth Futures is operated in Partnership with overseas Jewish Federations and Keren Hayesod/UIA communities, with Israeli philanthropists, and with the Government of Israel. The program serves nearly 10,000 youth in 32 localities, primarily in the Negev and Galilee. The innovative Youth Futures model is based on "Trustees"—some 300 young adult Israeli social pioneers—who work full time to build a strong relationship with children and their parents. The Trustees tailor an annual work plan for each child, based on his/her strengths and needs. The work plan is developed in coordination with parents, teachers, school counselors, social workers and other professionals.

This program could also become a free-standing nonprofit that would receive a start-up grant or challenge grant from the Foundation. It would have its own board of directors and would be established as an innovative start-up with the intention of developing its own financial sustainability.

There are many other programs that are "owned and operated" by JAFI that could be independent nonprofit organizations. Once they are operating on their own these programs might work to strengthen their local communities. Imagine, for example, if the summer camps run by JAFI throughout the former Soviet Union were developed as nonprofits to be supported by a partnership between the Foundation and the local Jewish communities there. We have seen the rise of wealthy Russian Jews in many of these communities. If they felt some "ownership" of these camp programs, there is no doubt they would be prepared to provide the financial backing for these and other local community organizations.

The Department of Grants and Allocations would be charged with evaluating and reporting on all funded programs. There is no shortage of sophisticated approaches to monitoring grantees, but evaluations would certainly be required on a regular basis for deciding whether the grants should be renewed.

CONCLUSION

Consider how much could be accomplished if the energy and resources that are presently being expended to keep JAFI's programs relevant and operating were

used instead to bring Jewish leadership together for the sole purposes of identifying crucial issues and empowering people to provide the necessary resources to deal with the challenges. This would alleviate the need for investing large sums in the organizational structure that is necessary for maintaining its own programs. Instead of engaging in another strategic planning process, of which there have been several during the last 15 years (Pearlstone, 2010), it would be more meaningful to focus on a process that would renew JAFI in a way that is more appropriate for the needs of Israel, the Jewish people, and the Jewish communities today.

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Community Renewal After Disaster

New Orleans After Katrina

Michael J. ***Weil***

It doesn't have to take a hurricane.

In August 2005 Hurricane Katrina's devastation rocked the Jewish community of New Orleans, shaking the very foundations of communal relations, the way institutions were structured and functioned, and the policies they staunchly defended. Ultimately, resilience and working together prevailed, with greatly successful outcomes. By understanding that disaster brings opportunity and through a strategic planning effort led by the Jewish Federation of Greater New Orleans, the community has rebuilt and transformed itself. Aggressive recruitment of young newcomers complemented by extensive social programming has rejuvenated the community and replenished lost population. Unusual collaborations and mergers across denominations have resulted in bold initiatives and strange alliances.

Before Katrina struck, New Orleans, despite a thriving tourist industry and a large port, had been losing population steadily. Once the third largest city in America, it was losing economic ground to forward-looking cities such as Atlanta and Houston. New Orleans leadership seemed to be content with its past rather than reinventing itself for future opportunities. It is against this backdrop of a slowly declining and decaying city, with problematic and ineffectual leadership, that Hurricane Katrina's impact and subsequent recovery should be evaluated.

This article describes the New Orleans Jewish community's transformation from 2005 through 2012 in the context of a conceptual understanding of the nature of post-disaster recovery. It also raises the question whether such a positive transformation would have been possible without a hurricane and its effects.

PATTERNS OF DISASTER AND RECOVERY

Disasters are very different in form and impact (Albala-Bertrand, 1993). Most are unexpected; for example, earthquakes and terrorist attacks. Others like hurricanes come with advance warning. Some are narrow and focused in impact like 9/11 or tornados, whereas others such as volcanoes can affect a wide area. Some are deadly, causing major loss of life and injury, whereas others have an impact mostly on buildings and infrastructure. There are natural disasters and human-generated disasters, such as terrorist attacks, nuclear accidents, and economic failures.

From my experience working in urban planning and development in Israel and Britain, I have come to learn that there are eight laws of disasters:

Copies of the Jewish Federation of Greater New Orleans, *Strategic Plan for Rebuilding and Renewal 2007–2012,* are available by contacting michael@jewihsnola.com.

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1. Disasters can and will happen.
2. Most disasters are unpredictable in time, place, and impact (except hurricanes and snowstorms).
3. We learn from the past, but are never fully prepared for the next disaster.
4. The more developed a region, the greater the physical impact and cost of repair, but the lesser the cost in human life and injury.
5. Less developed regions are more prone to disasters and have lower levels of physical and human resilience.
6. Disasters are different in impact depending on their origin and nature.
7. People care initially and then forget as the next big story (or tragedy) hits the news. Hence, there is a limited window of opportunity to secure outside aid and support.
8. Disaster recovery patterns are surprisingly similar, regardless of the nature of the disaster.

Katrina followed these eight laws. Although its approximate landfall on the Gulf Coast was predicted, the extent of its damage was not anticipated. It wreaked the greatest damage on buildings and infrastructure, damaging more than 80% of all structures in the city and surrounding areas. And although 1,833 people died in Katrina, this loss of life was very low compared to natural disasters in developing countries; consider that close to 200,000 people died in the 2010 Haiti earthquake. In another comparison, the estimated cost of repairing Haiti's disaster was not more than $20 billion compared to as high as $125 billion in New Orleans. The price tag on repairing the earthquake damage was relatively low because Haiti had very little infrastructure and few large or multi-story buildings. Even Super Storm Sandy was fairly limited in damage, with most estimates in the $60 billion range. This amount of damage is relatively small, considering the enormous swathe of the storm across the Northeast coast.

Law #8—disasters take very different courses and have very different impacts, but the recovery processes are very similar—also held true for Katrina. The recovery process undergone by the New Orleans Jewish community has followed the same sequential, three-phase pattern occurring after other disasters: (1) immediate and urgent response, (2) intermediate recovery, and (3) long-term rebuilding and renewal.

Disaster recovery patterns are surprisingly similar, regardless of the nature of the disaster.

However, the length of the entire process and the individual phases can vary considerably from disaster to disaster. In the case of the Asian tsunami, the earthquake in Haiti, and Katrina, the first phase took many months, and the involved areas are still in the third phase of long-term rebuilding. In contrast, in the two New-York-based disasters—9/11 and Superstorm Sandy—the first two phases concluded very rapidly, though the long-term rebuilding after 9/11 is still taking place 12 years later.

THREE PHASES OF NEW ORLEANS' RECOVERY AFTER KATRINA

Phase 1: Immediate Response

The immediate response to a disaster is to engage in search and rescue, saving as many lives as possible; to secure infrastructure; and to restore essential services, power, and water. Although New Orleans was under a mandatory evacuation order after Katrina made landfall and the levees breached in 50 places, many tens of thousands—those who chose to stay and many others who did not have the economic means or ability to evacuate—remained in their homes or sheltered at

the Superdome and Convention Center. Soon after Katrina struck, President Bush declared a national state of emergency, and the police, Coast Guard, and National Guard were deployed in search-and-rescue missions and to control widespread looting; a curfew was imposed. It took nearly a week to complete evacuation of the Superdome and the Convention Center.

By early October, after a second hurricane, Hurricane Rita, had hit the Gulf Coast, a total of 1.5 million persons had been evacuated from damaged areas; 30,000 of these individuals were being housed in out-of-state shelters and 46,400 in state shelters. More than 800,000 people were displaced and 204,000 homes were destroyed or damaged. Roughly one million people had applied for hurricane-related aid.

Phase 2: Intermediate Recovery

The re-entry process was a graduated one that began in the city center where there was less damage and power and water were restored first. Yet even when re-entry was permitted, most people did not have habitable homes to return to and services in the city had not been restored: there were no functioning gas stations, pharmacies, supermarkets, businesses, or public transportation for many months. Thus families in many cases stayed in their evacuation destination cities for months after the floodwaters receded. The intermediate recovery phase began in October 2005 and continued over the next two years or more.

Phase 3: Long-Term Rebuilding and Renewal

This third phase is the most critical and fundamental to the success or failure of the recovery process; it is also the phase in which the opportunities that a disaster may provide are realized. The success (or failure) of this phase is determined largely by the actions (or lack of action) by local leaders. The Chinese proverb—*"A crisis is an opportunity riding the dangerous wind"*— is quite apt here, because disaster can bring with it an opportunity to rebuild anew, to reinvent, and to bring about structural change.

Disaster can bring with it an opportunity to rebuild anew, to reinvent, and to bring about structural change.

Long-term rebuilding takes place on the physical level: major new construction, rebuilding of damaged areas, repair to existing infrastructure, and the development of new infrastructure. It also includes organizational governmental changes and the forming of coalitions of the willing, bringing together government, business, and nonprofits with citizen engagement. All of this requires funding, which fortunately in the United States is usually readily available through federal disaster aid. Whether such funds are used largely for patching up or for strategic renewal is dependent on the effectiveness of local leadership.

In disaster recovery, rebuilding efforts take three forms that correspond to the three phases of recovery: temporary repair or patching up what is necessary to bring back some normalcy and functioning of basic services; longer term repair and renovation, and new construction. Critical to the success of recovery is the extent to which these three types of rebuilding, particularly the latter two, take place in parallel rather than sequentially.

The massive injection of external funds after a disaster can act as a multiplier and generate economic growth. The earlier that new construction can take place and the more rapidly that repairs can be made, the more accelerated will be the pace of recovery and the more that this rebuilding can serve as an

economic multiplier. Economists tell us that accelerated economic activity will increase demand, raise prices, and in turn generate new growth (Okuyama & Hewings, 1999; West & Lenze, 1994). Indeed many cities have successfully recovered from natural disasters, using them as springboards for urban revelopment (Rodriguez, Quarentelli, & Dynes, 2007). In New Orleans, unfortunately, federal, state and city officials fumbled as to the appropriate strategy for recovery.

Frederic Schwartz, the architect selected by the citizens of New Orleans and the New Orleans City Planning Commission to draw up a plan for reconfiguring the city, explains how the need to rebuild the city can provide an opportunity to strengthen social justice and community life:

The planning of cities in the face of disaster (natural and political) must reach beyond the band-aid of short-term recovery. Disaster offers a unique opportunity to rethink the planning and politics of our metro-regional areas—it is a chance to redefine our cities and to reassert values of environmental care and social justice, of community building and especially of helping the poor with programs for quality, affordable, and sustainable housing (Schwarz, 2007).

Unfortunately, in New Orleans, instead of parallel recovery, we experienced only sequential recovery as each process followed the other. The first three to four months after Katrina were spent on restoring the city to temporary running order, as utilities and services were partially restored. The repair and renovation (second phase) took much longer and extended over some years and is still not completed. The new construction (third phase) only really started in 2010 after Mitch Landrieu was elected as mayor. The slow pace of recovery and rebuilding has meant that New Orleans missed out on the opportunity of benefiting from accelerated economic growth and its multiplier effects.

Much of the delay in embarking on the second and third phases can be attributed to the failure of government at all levels. The federal government largely only concerned itself with the repair and rebuilding of the levees and the storm protection system while it dilly-dallied on the funding of home rebuilding. The state contributed little and the municipality spent much effort and monies on complex planning schemes, but made little headway on the ground. One example, emblematic of this government failure, was that it took three years for the city and Regional Transportation Authority to reopen the iconic St. Charles Avenue streetcar line. Even within the business sector, recovery has been slow. It took several years for some of the major hotels to reopen, and some major theaters and performance areas are still in the process of repair and renovation.

In contrast, the community-based and grassroots sector filled some of the vacuum left by government; indeed much of the rebuilding that has occurred is due to the tireless work and innovation of civic and community groups. The justly maligned public school sector has made an amazing comeback, as New Orleans has become a center of educational reform with the largest number of charter schools in the nation; this effort was largely spearheaded by volunteer leaders. New Orleans has also become a mecca for start-up efforts fostered by incubators that have helped create an atmosphere of innovation.

However, the pace of recovery in many neighborhoods has been slow. In contrast, the Jewish community has experienced a fast-paced recovery characterized

by innovation. The only comparable success story is that of the Vietnamese community, which has made a very different yet successful recovery (Weil, 2011).

JEWISH NEW ORLEANS PRE- AND POST- KATRINA

The Jewish Community in New Orleans in 2005

The state of the New Orleans Jewish community in 2005 was similar to that of many other small or mid-sized communities in the South. Most of its 9,500 Jews belonged to a synagogue, and most of these identified with the Reform denomination. The community was blessed with a well-developed communal infrastructure with nine synagogues and ten agencies, including two Jewish Community Centers and two day schools.

But the outlook was bleak. The community was in a slow but steady process of demographic decline. The population was not only dwindling but also aging. Youngsters were leaving town to study at universities elsewhere and many did not return. Synagogue membership was declining or stagnant. Even the New Orleans Jewish Day School, which had just celebrated its first eighth-grade graduation class, had less than 90 pupils. Federation's annual campaign was declining too and its major donors were aging. With the size of the community decreasing, agencies and synagogues competed with each other in a search for organizational survival in an environment of an over-extended physical and institutional infrastructure designed for a community some 30-40% larger. The stability in the face of the slow but long-term decline made for a sense of complacency. In fact, the lack of a sense of crisis might have been the crisis.

The Jewish Community in the Immediate Aftermath of Katrina

Along came Hurricane Katrina and the devastation it wrought. Like the rest of the city, the Jewish community was heavily damaged, with 80% of all Jewish homes and Jewish institutional buildings affected, some more than others. The Beth Israel Orthodox synagogue took in eight feet of water and was devastated. The Jewish community campus in Metairie took in two feet of water and was closed for months. The day school housed in the building remained closed for a whole year and when it reopened in August 2006 it had only 22 students—down from 88.

THREE PHRASES OF RECOVERY IN THE NEW ORLEANS JEWISH COMMUNITY

Phase 1: Immediate Response

In advance of Katrina's landfall, the staff of Federation had evacuated to different locations based on personal preferences. However, once it became apparent that the evacuation would be lengthy, they relocated to two centers. One small group was based in Baton Rouge together with some of the staff of the affiliate Jewish Endowment Foundation and Jewish Family Service, and the majority were based on Houston at the Federation offices there.

The first priorities were to ascertain any life-threatening situations, dispatch search-and-rescue missions to those in need, and assess damage to communal buildings. Since most of the community was now scattered across five states in the South, landlines were down, and even cell phones did not work, Federation

assumed the major task of helping people find each other. It set up a virtual database that became an invaluable tool for this and many other purposes.

The months-long hiatus that community members spent in Atlanta, Houston, Baton Rouge, and other cities while New Orleans was closed gave people time to think and ponder. The question that everyone faced—whether with regard to a family home, business, or a communal institution—was whether to return and then whether to rebuild—as is or differently—or to move to another part of town and then to what sort or size of structure.

Every New Orleanian faced this dilemma, and how they answered it depended on many factors—their age and the ages of their children, their roots in the community, whether they still had a job or not, and the extent of the damage to their home or business. Their choices became strategic ones. Of those who returned to New Orleans and sustained major damage, about half rebuilt their homes and half chose to move to other neighborhoods or to downsize to smaller homes and apartments.

Making these decisions was not a quick process and often took several years. In January 2006, the Jewish population had dropped to about 5,200 from the pre-storm figure of 9,500, and in May 2007 it was just under 6,000. Over the course of the next two years many more people returned, assisted by special funding that was made available by the national Federation system. Grants of up to $3,500 covering moving expenses were provided, and interest-free loans of up to $15,000 were given to rebuild homes or businesses. These funds were administered on behalf of Federation by Jewish Family Service. As of now, of the original 9,500 Jewish population all but about 1,800 have returned, and families continue to return.

Those who decided not to return after Katrina had two distinct profiles: (1) people in their 70s or older who typically evacuated to cities where their adult children and grandchildren lived and (2) young families in their 30s and 40s who evacuated to large cities mostly in Texas, Georgia, and Florida. Because of the timing of Katrina at the beginning of the school year and the extended forced evacuation, they enrolled their young children in local schools and simply stayed, enjoying the benefits of a larger Jewish community.

The loss of these two groups to the New Orleans Jewish community was considerable. In addition to the sheer drop in numbers, the Jewish community experienced a loss of seasoned leadership; at least 30 or so seasoned leaders of synagogues, Federation, and agencies did not return. It also experienced a loss of major donors, many of whom started to direct their giving to their local host Federations. Finally, the number of children was greatly reduced, which particularly affected the New Orleans Jewish Day School. As mentioned earlier, it reopened the next school year with only 22 students, its middle school eliminated, and some younger grades functioning as combined classes.

It was clear that recovering from Katrina was beyond the capacity of the small New Orleans Jewish community to do on its own, and so the national Jewish community gave life to the phrase: *Kol yisrael arevim zeh lazeh* (All of Israel is responsible for each other). The national response took concrete form in addition to the outpouring of sympathy and concern. Gifts of clothing, books, toys, and even Torah scrolls came from every walk of Jewish life.

These donations were followed by a constant stream of volunteers that continues to this day. No formal records were kept because the local professionals

were too busy on survival issues to keep track, but the Federation estimates that more than 25,000 Jewish volunteers have come to New Orleans to help it rebuild since Katrina. They included Hillel Spring Break groups, synagogues, JCCs, schools, and individual families celebrating B'nai Mitzvah or volunteering during school vacations. For the first post-Katrina year, two Federation staff persons coordinated the efforts of these volunteers. In an effort to focus the impact of Jewish volunteers, in 2008, Jewish Federation entered into a partnership with the St. Bernard Project, a local home rebuilding nonprofit, and since then has funded and rebuilt three homes.

And the national Jewish community responded so generously by contributing more than $34 million. In the days following Katrina's landfall, the United Jewish Communities (UJC, now the Jewish Federations of North America) convened its Emergency Committee, which subsequently made several site visits to New Orleans. UJC ran a national campaign that raised $28.55 million (UJC Hurricane Katrina Fund, 2007). At the same time, the New Orleans Federation, in conjunction with all the local agencies and together with UJC, conducted a quick assessment of its damage and needs.

Phase 2: Intermediate Response

The midterm recovery process took two years, from December 2005 to the end of 2007. During that time, many families returned, the leadership of the institutions and organizations stabilized, and religious leaders found their congregations to be smaller but more actively engaged. UJC, Federations, foundations, synagogues and individuals contributed significant funding that supported the community, synagogues, and agencies over this period. The Jewish community seized on the opportunity provided by Hurricane Katrina to reflect on its needs and the best way to meet them. The strategic planning process, described below, was central to the interim phase and set the stage for long-term rebuilding and renewal.

From the UJC campaign, $13.6 million was allocated directly to the Jewish Federation of Greater New Orleans, and an additional $1.26 million was allocated for Jewish institutions in the city. Other Jewish federations and organizations in the Gulf Coast, including communities that hosted evacuees from New Orleans, such as Baton Rouge and Houston, received $5.32 million. Approximately $1.5 million was given to non-Jewish organizations on the Gulf Coast as an expression of the national Jewish community's commitment to help the wider community. Unfortunately much of the impact of this generosity was lost because UJC did not coordinate this aid with local Federations, which would have enabled the local Jewish community to benefit from the credit or use that as leverage.

Locally $3 million were donated by two family foundations, and an additional $1.4 million was allocated by the Jewish Endowment Foundation of Louisiana. When added to the allocation from UJC, more than $16 million became available for the Two Year Stabilization Fund, to be administered by Federation. The purpose of this fund, which was established jointly by UJC, Federation, and its local partners, was to enable all the local synagogues and agencies to recover from Katrina. The Fund's allocation to local institutions replaced lost income and revenue (including membership dues and campaign pledges that could not be collected), thereby enabling them to pay their bills, staff salaries, and for needed repairs not covered by insurance. Basically the Fund

was intended to allow the community to begin functioning in a semi-normal fashion. Yet, its significance was far greater.

The process of distributing the funds was a complex and sensitive one that the Federation took very seriously. It created a new committee composed of the members of the statutory Federation finance committee plus some other key leaders; together with UJC the committee developed a set of rules for the allocation of funds. Funds would be distributed every three months based on each organization's quarterly financial report stating in detail both revenues and expenditures, with actuals going back and forecasts going forward. After reviewing the financial statements the committee would then distribute funds based on an assessment of the gap between anticipated revenues and expenditures. Each organization was required to hire auditors to audit the process from its end (the Fund paid for the auditors), to present detailed accounts, and to open separate bank accounts for the Fund allocation.

Nineteen agencies and synagogues participated in this detailed process. All these organizations fulfilled their requirements and were largely satisfied with the funds received; there were few complaints or appeals. Overall there was a sense of gratitude that was expressed many times over to UJC and Federation for coming to the financial rescue of the community and its organizations, thereby enabling all the institutions to return to business almost as usual and to recover. Federation's role in distributing these funds also enhanced its political centrality.

However, the Fund provided yet another very significant benefit. By guaranteeing funding for a two-year period (which was later extended to three years), the Fund gave the organizational leadership peace of mind—allowing them the freedom to think, consider, and plan for the future without worrying about their institutions' survival. This time was also used to consider structural changes and innovations, which set the stage for the strategic planning process led by the Federation.

Strategic Planning Process Too often, communities recovering from disaster focus solely on achieving some level of normalcy and "business is usual"; they pay less attention to exploiting the opportunities that disaster brings. The strategic planning process, made possible by the Two Year Stabilization Fund, largely succeeded in laying the groundwork for strategic change and innovation. In this process, the community was able to think about the future in new ways, consider some ideas that had been politically unthinkable, make some dreams come true, and at the very least implement some long-term plans that had been shelved.

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The leadership of the Jewish Federation quickly understood that its primary role over the next five to ten years would be to provide guidance and direction for the process of recovery and renewal. Although many Federations tend to be inward looking, the situation called for the New Orleans Federation to assess, communicate, and lead within the New Orleans community, as well as be outwardly focused to the rest of the nation, with the goal of articulating a vision and clear strategy to propel New Orleans to a new and better place. Its aim was to involve as many community members as possible in a strategic planning process.

A 30-member Recovery Task Force made up of lay leaders from the boards of synagogues, Jewish organizations, and agencies, as well as the professional staff from these institutions, was established to guide the planning process. As a first step, it developed this mission statement:

The New Orleans Jewish community will recover, increase its population, and enhance the quality of Jewish life by providing opportunities for interpersonal, educational, spiritual and economic growth through the united efforts of all Jewish institutions.

When I became executive director of the Federation in October 2006, I helped restructure the planning process into the following five Task Forces:

- ***Task Force #1 – Population and Community*** focused on how to increase and strengthen the size of the Jewish community by exploring ways to entice people to relocate to New Orleans, retain those who were here, and reach out to those in the greater metropolitan area currently not affiliated with the Jewish community.
- ***Task Force #2 –Funding Raising*** focused on increasing funding to support community priorities.
- ***Task Force #3 –Geography and Services*** focused on identifying the needs of the different geographic Jewish communities and how best to provide services to them.
- ***Task Force #4 –Agencies and Organization*** examined the institutional structure and organization of the Jewish service delivery agencies and organizations with the goal of increasing collaboration among service providers.
- ***Task Force #5 – Public Relations and Marketing*** addressed public relations and communication strategies.

The individual Task Forces met regularly to consider these broad questions:

- How can the community replenish lost population, particularly the loss of major donors, leaders, professionals, and young children?
- How can it tap into new sources of funding outside of New Orleans, capitalizing on the nationwide sympathy that was being expressed, and how long would such a funding window remain open?
- How can it persuade UJC that external fundraising was necessary even if that meant deviating from existing Federation practices of not fundraising in other communities?
- What new programs, institutions, and ideas are called for?
- How can the community maintain an atmosphere of optimism at a time when so many people were grappling with the disaster at a personal level?
- How can it plan for change in a negative external environment of poor political leadership, damaged infrastructure, a challenging economy, and age-old problems of crime and corruption?
- How can it counter negative images nationally of New Orleans?
- How can it prevent "Katrina fatigue"?

The Task Forces also considered solutions to some structural problems such as the following:

- What would be the likely geographical movement within the community? Which neighborhoods would lose or gain Jewish population?
- Would there become a "diaspora" of New Orleans Jews in Atlanta and Houston?
- What new collaboration and mergers might be possible?

- Would the community be able to continue to raise sufficient funds through the Federation's annual campaign and others to sustain a community that was likely to have fewer donors?

The planning process culminated in a day-long marathon community session in March 2007 attended by more than 250 people; the day ended with a vote on community priorities. As a result the strategic vision was revised to reflect the community's hopes for a reimagined New Orleans Jewish community:

To transform the New Orleans Jewish community into the most successful, vibrant and rich intermediate Jewish community in North America—attractive to young Jewish families.

The Strategic Plan was completed in the fall of 2007 and published in May 2008; it laid out specific recommendations to be implemented over five years. To its credit, by the target conclusion date of August 2012, the majority of the recommendations were enacted, resulting in a transformed and reinvented New Orleans Jewish community.

Phase 3: Long-Term Recovery

The third phase of long-term rebuilding and renewal began with the implementation of the Strategic Plan's recommendations. It soon became clear that the generous support provided by the national system was only sufficient to carry the community through the first two stages of recovery: meeting its initial needs and then the intermediate recovery. To take advantage of the opportunities for change that the disaster brought and to ensure a comprehensive rebuilding process, significant additional funding was necessary. The implementation of the Strategic Plan would require millions of dollars, funding that was far beyond the capacity of this mid-sized Jewish community.

Federation devised a two-pronged approach to obtain the needed funding. First it hired a grant writer to identify funding sources from foundations and philanthropists around the country. Time was of the essence because it was necessary to approach funders while the "Katrina window" was still kept open by sympathy and concern. Over the course of three years $6 million was raised from national Jewish family foundations and large city federations. Although the fundraising effort was run by the Jewish Federation, the beneficiaries were mostly the constituent agencies of Federation.

The second prong was to approach United Jewish Communities in the hope of obtaining additional funding for long-term rebuilding. Initially this was met by resistance for several reasons. UJC felt that it had already helped more than enough. But more important, there was a lack of understanding of the need for long-term rebuilding as part of the recovery process. UJC was also less than happy that the New Orleans Federation had approached other Federations for funding in a violation of UJC practices. Ultimately an understanding was reached, including the New Orleans federation's acceptance that it was better for New Orleans to work with and through the system. A strategy meeting was held between the leaders of the New Orleans Federation and UJC in Atlanta in April 2008 where an action plan was decided upon. Unfortunately, it was never implemented because by that time the Katrina window was closing and the national recession was setting in.

One of the unique features of the strategic planning process was the manner in which it was implemented. Typically such a process follows a linear approach whereby planning is followed by approval and then implementation. In the case of New Orleans, these phases took place in parallel, and new ideas were implemented almost immediately. The prime example was the Newcomers Incentive Program, the flagship program of the Strategic Plan.

The Newcomers Program Soon after Katrina struck, it became clear that the story of New Orleans and the need to rebuild this great city resonated strongly with young people. A stream of young professionals joined local grassroots organizations as volunteers and as staff. A large proportion of these young men and women flocking to New Orleans were Jewish and were motivated by the Jewish ethics of *Tikkun Olam* and social justice.

Thus disaster had indeed created an opportunity, and there was much to attract young people to participate in the post-disaster recovery. I took the lead and created the Newcomers Incentive Program, adapting some of the principles of Israel's successful model of supporting *Olim* (new immigrants) and creating an extensive package of support and incentives. This program was an innovation on the American scene that has not been replicated, though some communities have implemented similar programs on a far smaller scale. Most Federation programs for new residents are limited to welcome packages, hospitality, and information packets.

The Newcomers Incentive Program has provided an array of benefits and programs that were meaningful to this young demographic. The Federation appointed a dedicated staff member to oversee the program, providing information, assistance, and support on questions related to employment, housing, social life, and services and working with a lay committee to plan social events. Since its inception, the Federation has spent approximately $1.1 million on the Newcomers Program (its name was shortened in 2009).

Newcomers are embraced socially through a buddy and host system, welcome baskets, congratulatory cards, and invitations to newcomer social events held every six months at the luxurious homes of prominent members of the Jewish community. The programs at these events are kept deliberately light and the food and wine tasty and classy, such that each event has attracted 100–200 people in a welcoming but not overbearing way.

In addition, free one-year memberships are given for any synagogue in the area, the JCC, Hadassah, National Council of Jewish Women, and JDate. Moving and rental grants and interest-free loans for housing or starting a new business have been provided. Federation imposed several conditions for receipt of these funds; for example, grants were only given to those with full employment or the equivalent, and newcomers were required to sign a three-year commitment to stay or otherwise return the funds. The incentive package was designed to encourage (but not force) engagement in the community: Receipt of second- and third-year grants was dependent on joining a synagogue.

In addition to its basket of incentives, what contributed to the success of the Newcomers Program was that it built on a demographic segment that was responsive to the support offered and was already considering a move to a welcoming community. Typically the cohort aged 25–35 is highly mobile, eager to seek out new opportunities and challenges both professionally and Jewishly.

New Orleans embodied that challenge, providing the opportunity to be part of rebuilding a great city that had significant needs. The attractions of New Orleans—Mardi Gras, music, amazing food, and its unique culture—added to the mix. That fact that New Orleans, despite Katrina and the recession, had a robust economy and a growing job market made it an easier sell.

Over the years, the extent of the financial support has been reduced considerably but not eliminated. Currently, grants are limited to $1,800 paid over three years and we are considering switching to a voucher system whereby the benefits will be mostly in-kind. However, this reduction in benefits has not led to a decrease in applicants.

Since its inception, the Newcomers Program has brought to New Orleans more than 2,000 newcomers, about 1,500 of whom have been a formal part of the program. The large majority of newcomers are "Millennials," young adult singles with no children. Eighty-one percent are under the age of 40 (nearly half are in their 20s), and 75% are not married. Only 10% of newcomers have children, and nearly all of those children live at home and are under age 18.

What is fascinating about the newcomers is that they are not the typical mix of doctors, lawyers, and accountants. Many are working in media, the film and music industries, restaurants, and especially in nonprofits. Even many of the lawyers are working in social-justice-related positions such a public law clinics or the public defenders office. New Orleans also has an emerging start-up sector, and many newcomers are budding entrepreneurs and in hi tech.

Geographically, the newcomers have changed the pre-Katrina trend of moving to the suburbs. Instead, they are gentrifying urban neighborhoods. They are also shifting the religious makeup of New Orleans; fewer are Reform and more are Conservative and Orthodox.

The attrition rate of the newcomers is surprisingly low for such a young and mobile demographic. Since the program began in 2007, approximately 27% of newcomer households have moved out of New Orleans, primarily to pursue a better career opportunity. Although approximately a quarter of all newcomers have moved, only 7% of funded newcomer households have done so, which demonstrates that the overwhelming majority of newcomers who have received funding are fulfilling their commitment to stay in New Orleans.

Since its inception, the Newcomers Program has brought to New Orleans more than 2,000 newcomers.

Because of the young demographic profile of newcomers, it is too early to feel their impact on leadership, on day school enrollment, or as donors to campaign. The New Orleans Jewish community is facing a significant age gap, which is one of the long-term adverse impacts of Katrina. Although its population now surpasses by 300 that of pre-Katrina New Orleans, it still feels the loss of leadership, school-aged children, donors, and synagogue members. It will take another decade or so until that gap is filled and the investment yields a full return.

A parallel program to the Newcomers Program was instituted in 2008 called JGrad – Student Retention Program. With more than 3,000 Jewish students attending universities in New Orleans, mostly at Tulane, students were considered a low-hanging fruit from a marketing perspective. As much as students loved to study in New Orleans, few were considering the city as a place to work and live after graduation. JGrad was designed to change that. The activities of JGrad have now been absorbed by the Newcomers Program.

A CHANGING INSTITUTIONAL MAP AND A CENTER OF JEWISH EXPERIMENTATION

The post-Katrina recovery set the stage for organizational change and innovation. The opportunity to rebuild brought with it not only social-justice-minded newcomers (some of whom first came as volunteers) but also new organizations, many related to social justice. Facilitating these processes, Federation added to its traditional role of fundraising and allocations the role of community building and shaping. It has also supported new organizations both through its Beneficiary Agencies grants and through two cycles of grants for innovative projects made possible by a contribution from a benefactor from Cleveland.

The environment supportive of innovation has led to the development of these new organizations:

- In 2007, encouraged by Federation, AVODAH: The Jewish Service Corps established a site in New Orleans after successes in New York, Chicago, and Washington, DC. Avodah House became home to ten Jewish young interns annually who were placed at different nonprofit organizations but lived and studied together in an intentional community based on Jewish approaches to *Tikkun Olam*. Some 75% of its alumni have chosen to remain in New Orleans and continue to work either in Jewish communal service or grassroots organizations.
- Moishe House was established in 2008 as part of a global network of mini "communes" whereby young residents live with subsidized rents but open their house for social and cultural activities for young people.
- LimmudFest New Orleans took place in 2010 and 2012 and will again be held in 2014 as part of an international movement of learning experiences that began 30 years ago in Britain. New Orleans is the first mid-sized city in the United States to hold Limmud, and it succeeded in attracting 400 attendees at 75 sessions each time.
- The River Minyan was started as an alternative home for prayer.
- The short-lived Nola Chavura was an attempt to start a somewhat radical left Jewish advocacy group.
- Sisters Chaverot is an innovative platform of Jewish and African American women professionals to discuss common issues and challenges with more than 85 women active and extensive programming.
- Ayla is an LGBTQ group started in 2010.

Federation itself has also been innovative. In addition to its highly successful Newcomers Program and accompanying JGrad program, it has in recent years revamped some of its successful long-running programs that had begun to show their age. Its young leadership program has been completely refashioned. Federation engaged a consultant to renew its annual campaign, and recently it has brought all of its programming for young adults offered though its Young Adult Division, Newcomers Program, JGrad, and the JCC's Young Jewish Crescent City under a new umbrella called JNola.

The community's physical infrastructure has also been updated and expanded. A new Hillel building was erected near Tulane's campus in 2011. Chabad built its own student campus building as well as expanded its Uptown Center. Plans are underway for a new community mikveh, expansion of the JCC, and rebuilding of the damaged Chabad day school.

Synagogues saw a resurgence after Katrina not so much because membership grew but rather because those fewer members attended more frequently. This higher attendance was a testament to the increased community engagement after Katrina. Newcomers too began to be visible at synagogues and helped increase membership in some congregations.

One of the important elements of the revival of the Jewish community has been the changing face of its professional leaders. Over the three years following Katrina there was a rapid turnover of communal professionals—four of the nine synagogues hired new rabbis, and the Jewish Federation, Hillel, and the Day School hired new executives. Fortunately, this turnover resulted in a substantial professional upgrade, which in turn helped upgrade the effectiveness of the institutions.

The Katrina experience fostered an atmosphere of working together. It was clear that survival and recovery were only possible if people and organizations worked together and sought innovative solutions while burying their differences. This set the stage for the following mergers and collaborations, most of which would have been unthinkable before the storm:

- Three of the four constituent agencies now hold one combined annual fundraiser.
- Federation hired a grant writer/consultant who searched for and obtained grants for all the agencies.
- The New Orleans Jewish Day School entered into discussions with Chabad's Torah Academy about merger or collaboration, though little materialized from this effort.
- Three Reform synagogues formed a joint religious school program for eighth and ninth graders and have a joint youth group advisor.
- Every synagogue and agency in New Orleans joined the Create a Jewish Legacy program of the Jewish Endowment Foundation.
- The Reform, Orthodox, and Conservative synagogues in Metairie hold joint educational programming; the Orthodox and Conservative synagogues celebrate Purim together at a joint Megillah reading extravaganza.
- The JCC and Federation created a new umbrella group for Next Gen programming–JNola.
- Some 15 Jewish organizations and synagogues marched together on Martin Luther King Day 2013 under the auspices of the Federation's Jewish Community Relations Council.

Public Relations

For any major change to be successful, it is always necessary to accompany it by a marketing and public relations effort. Much effort was extended to enhance the image of the community both internally and externally.

Internally, as the community was coping with the trauma of Katrina, renovating and rebuilding damaged homes and institutions, and pondering the future, it was important to create a positive and upbeat atmosphere. This was done in several ways. The marathon planning day in March 2007 was both meaningful and fun. The very arrival of newcomers and their presence at community events and services were morale boosters and were highlighted in all publicity. Similarly as major donations were received, they were well publicized.

It was unusual for a mid-sized community to engage in external public relations, but doing so was important: Federation was trying to attract newcomers from across the country, at the same time as it was soliciting donors and foundations for funds and was attempting to keep interest alive in New Orleans' recovery. The PR campaign took several forms. A firm based in Israel offered its services pro bono—redesigning the Federation logo (a clarinet with a wavy Star of David coming out as musical notes), tagline, website, and annual report. Federation approached many media sources in North America (Jewish and non-Jewish) as well as in Israel to share its story. This campaign was successful, and the recovery program was featured prominently in articles in the general and secular press. As exemplified in a 2008 article in New York's *Jewish Week*, titled "New Orleans – The New Mecca of Tikkun Olam," the media campaign changed the image of the New Orleans Jewish community from one of suffering to one of growth and transformation.

CONCLUSION

Since 2007, the community has continued on its trajectory of recovery and transformation. What was once a quiet, traditional, and slowly declining Southern community has been reinvented into a growing, rejuvenated, and exciting one. Newcomers continue to move to New Orleans at the rate of several hundred a year, and veteran members still continue to make their way home. Most of the communal institutions are stronger than before and their future prospects look good. They continue to adapt, change, and develop, and the spirit of collaboration remains strong even now over seven years after Katrina. If in the early days it seemed that the community might have to shed some of its physical and organizational infrastructure to serve a smaller population, today this seems unnecessary as the community surpasses its pre-Katrina numbers. Indeed expansion in programming and facilities seems to be the mood of the community. The community calendar is enormously rich and agencies are vying with people to attend competing and attracting events on the same nights. New grassroots organizations continue to spring up, and the community in general and Federation in particular are supporting them with their feet and with their dollars.

With fewer donors, however, Federation as well as the other agencies are struggling to raise the necessary funds to support the community with its expanded needs and programs. Federation's annual campaign dropped from its pre-storm levels of $2.8 million to $2.55 million. It is trying to make up the difference through an energetic campaign to solicit corporate funds, sponsorships, advertisements, and foundation grants. The community has successfully conducted several capital campaigns since Katrina, and New Orleans as a whole has ridden out the recession better than other communities.

The provision of major external funding was crucial in that it allowed the community to slowly come back to some level of normalcy while focusing on planning for a new future and bringing about needed change. One of the major lessons learned is the importance of fully supporting the third phase of long-term rebuilding and renewal.

Could all this have happened had there not been a disaster? Probably not. But would this have happened elsewhere? Probably not either. Katrina as a trigger that kicked off the recovery processes that the community leadership then

pursued diligently. By thinking and acting strategically and by keeping focused on the objective of rebuilding an exciting community, the New Orleans Jewish communal leadership was able to engineer a true reinvention. Much of the credit must also go to the local community members: They showed extraordinary resilience, creativity, a sense of togetherness, and an ability to be open to new ideas and initiatives.

The big question is this: How can a community undergo a major transformation and rebirth without the shock of a major disaster?

An analysis of the New Orleans recovery uncovered a number of components key to its success. The first is the realization that all was not well with the status quo. The second is the willingness to do something about it. The third is the understanding that long-term thinking and long-term solutions are necessary. And the fourth is the acceptance that real change can only come about by burying differences and working together. Added to this was the unexpected availability of significant funding that came from the national system, which ensured that change would not necessarily mean less for some, but actually more for everybody.

In the case of Katrina, those components were essential but not sufficient. The realization that drastic positive change is possible only came about through the strategic planning process, which if done effectively can highlight the critical issues and challenges facing a community, generate alternative bold futures, and then develop creative ideas and strategies to achieve them. The temptation to revert to the status quo was clearly present and had to be fought.

One way for a community to reinvent itself without the impetus of a disaster is to conduct a community survey and analyze the results to bring focus to community trends. For example, in 2001 the results of the National Jewish Population Survey acted as a shock treatment. The finding that more than one in two marriages were between interfaith couples was a wake-up call that resulted in many new actions and strategies, such as increased investment in Jewish day school education, outreach to interfaith couples, and the creation of Birthright Israel.

Real change can only come about by burying differences and working together.

The worst time to work toward change and transformation is when there is less and less money to implement needed changes. Doing so creates a sense of negativity and foreboding. However, if new funding can be made available through major grants, then the question of how to divide up a new larger pie becomes promising, especially if framed under the condition of spending the funds on the new, the strategic, and the significant.

Another way to bring about change is to initiate a strategic planning process that will highlight problem areas and the potential for transformation and vibrancy. A third way is to build around major events or milestones. This was done in New Orleans twice since Katrina: (1) the 2010 hosting of the Jewish Federations of North America's General Assembly and the International Lion of Judah conference and (2) the celebration of its 100th anniversary of the Federation in 2013 with themed events, a centennial journal and video, and a special second-line campaign. Both these major events served to further invigorate the community.

Katrina was a major tragedy and its price heavy. But the recovery and rebuilding processes engaged in by the Jewish community in New Orleans turned disaster into opportunity and, in the process, renewed and rejuvenated the community.

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A Family Engagement Community of Practice

A Case Study of a Collaboration Model

Naava ***Frank*** *and Lara* ***Nicolson***

How can you take a group of local federated agencies working in a similar field—some competing, some working in synergy, some unaware of the others' existence—and bring them together to have a profound impact on a critical sector of the Jewish community? This article tells the story of 12 months in the life of a Community of Practice (CoP) that shaped a collaborative culture among seven agencies of THE ASSOCIATED: Associated Jewish Community Federation of Baltimore and led to a shared grant for a project maximizing the impact of their work with Jewish families with young children.

This article shares the successes, challenges, and learning from the perspective of the community facilitators and members. We hope that it will help other Jewish organizations use the CoP model of collaboration to strengthen professional networks. Although work with human systems may not always be replicable, the CoP model described here can be adapted with thoughtful consideration to differences in context.

CONTEXT

In 2010, The Associated commissioned the Greater Baltimore Jewish Community Study, which found that a significant proportion of families with young children did not see the Jewish community's institutions and services as relevant to them. In response to these findings, the Louise D. and Morton J. Macks Center for Jewish Education (CJE) proposed and received a start-up grant from the JEEP (Jewish Education Enhancement Projects) Fund to create a CoP for Jewish communal professionals working with families with young children.

A Community of Practice (CoP) brings together professionals with a common set of interests to share knowledge, expertise, and tools to improve their practice and organizational performance. The term "Community of Practice" was coined by Etienne Wenger and Jean Lave in 1991 (Lave & Wenger 1991). Over the past two decades CoPs have become increasingly important in very diverse fields, from medicine to government and from insurance sales to early childhood education. Yet these forums for sharing stories in order to learn how to make our work better likely go back as far as human history itself. Did not the camel owners

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at the well where Rivka met Eliezer exchange information about how to care for their animals? Medieval guilds are also examples of CoPs. Research on contemporary CoPs has focused on how these learning exchanges can increase organizational performance through increased communication among professional peers, leading to greater efficiencies and the generation of new knowledge (Ardichvilli, Page, & Wentling, 2003; Lesser & Storck, 2001; Mason, Castleman, & Parker, 2006).

The Baltimore Family Engagement CoP aims to shape Jewish communal professionals working with families with young children into a more collaborative group and cross-train them in best practices to create more successful programming for this disconnected Jewish population. Its first 12 months included three phases: (1) the planning phase, which focused on discovering the needs of participants; (2) the formation phase, during which members created a charter with clear goals; and (3) the implementation phase, in which members met on an ongoing basis to work and learn together. Toward the end of the year the CoP secured additional grant funding for a second year of work together on a joint collaborative project.

A participant in the CoP articulated this community's success as follows: "The opportunity to gather with others doing the same thing as you are, with the same goals, and learning together, is tremendous. Each organization learned what the other is doing and were able to market together, which makes so much sense since they had similar audiences, they thought about ways to collaborate and not duplicate, all of which only strengthened each program, organization and professional."

PHASE I: PLANNING PHASE

The planning phase focused on preparing the community structures: finding a sponsor, selecting members, and conducting member interviews to assess each one's experience, needs, and interests. The CJE assumed the role of community sponsor, hiring Lara Nicolson in March 2011 as the community facilitator. Because CoPs were a new concept for CJE and for the facilitator, the sponsors decided to hire a consultant, Dr. Naava Frank, in July 2011 to bring in specific CoP expertise. During the year, Lara and Naava worked together remotely once a week to develop and implement the CoP, and Naava attended two of the five meetings of the CoP.

These learning exchanges can increase organizational performance through increased communication among professional peers, leading to greater efficiencies and the generation of new knowledge.

Selecting the members of the CoP is an important element in creating a viable community. The consultant recommended a stakeholder analysis to explore potential members' assets (intellectual, political, economic, geographic, etc.), liabilities, readiness, and possible leadership roles within the CoP.

The decision was made to start the project with a small group of ASSOCIATED communal professionals and to consider inviting local synagogues to participate in the future. Identifying 7 agencies and 12 professionals under the Federation umbrella who worked on the ground with families with young children and shared similar values and vision helped foster trust and collaboration. CoP members agencies are the CJE, JCC, Jewish Community Services; Jewish Volunteer Connection; Pearlstone Center, a retreat center with a sustainable farm; Jewish Museum of Maryland; and the Darrell Friedman Institute, which provides professional continuing education.

To facilitate a Community of Practice requires sensitivity to group and individual dynamics, including relationships of trust, power dynamics, and egos. Among the 12 participants there were a number of preexisting positive relationships, which allowed people to feel comfortable quickly. The CoP helped deepen and extend existing relationships and also expanded social networks by introducing people who had never met before. One member related, "My relationship with the other agencies ranged from strong to weak to nonexistent. The creation of the CoP has forced the agencies to create the time to work together and helped all agencies to understand what each other is all about."

Before the first group meeting Lara conducted one-on-one interviews with each participant to learn about them, the work they do, and their interrelationships. This maximized her ability to work effectively in future meetings. The interview findings were presented to the group at the first meeting in a confidential format.

The interviews confirmed that among these agencies were overlapping services, competition, isolation, lack of awareness of others' work, and limited collaboration. It also indicated that participants wanted a structure for collaboration and communication, ways to identify synergies, and a common approach to marketing and knowledge sharing. Though some professionals were concerned about the time commitment and their agency's place in the CoP, they were willing to try it.

From the interviews, Lara identified a pool of resources that the members had that would enhance the work of the CoP and provide mutual benefit. Members brought resources such as space (the Jewish Museum), expertise (social work or Jewish education), or connections to outside experts.

Starting at the interview phase, Lara helped members understand that there was value they could gain from working with other members of the CoP. That knowledge helped them overcome their hesitations and motivated them to attend the first meeting and to be predisposed to seeing the CoP as a successful endeavor. One member shared the following observation: "The Community of Practice began with a face-to-face interview with Lara Nicolson. This was a great way to begin the process, as it was an opportunity to examine my own professional role as well as the strengths and weaknesses of my department. It was also Lara's opportunity to explain the concept of the CoP and answer any questions that I have."

PHASE II: FORMATION PHASE

Entering any collaboration entails risk. Although participation in the CoP was voluntary, Lara realized that members might be reluctant to share their experience because it could lead to exposing their vulnerabilities or mistakes to people whom they did not know or trust. They might start off feeling skeptical or defensive about others' ideas that might challenge the way they had always worked or imply they should adapt or change their programs or services, or they might fear that collaboration could lead to their losing members and dollars to other organizations.

It was critically important to build a trusting environment that would enhance the work of CoP members and lead to benefits such as broader exposure and an increased audience for their programs or new programmatic ideas. Four programmatic elements helped build the working relationships and trust that the community needed to collaborate successfully.

Time Together

Through regular face-to-face meetings members spent time with colleagues they had not previously known or worked with. One member said, "I think the relationships have been strengthened.. more meetings, more face time...working towards the same goals."

According to another member, being exposed to the programs and best practices of others and seeing the big picture led to a realization of the value of the community and collaboration: "I think all members of our CoP were surprised by how much programming was already taking place and by how little we really knew what other agencies were doing. It was a 'light bulb' or 'aha' moment and a turning point in our CoP when we collectively realized that working together rather than individually would benefit all of us."

Task-Focused Work

Research shows that successful task-focused work builds trust (Becton et al., 2004; Erickson & Gratton, 2007). The community facilitator, consultant, and members planned five meetings during the first year of the CoP. Each meeting had a different focus, such as sharing programs and practices, cross-marketing of events, developing a group project, and engaging with expert speakers. One member said, "Each meeting was crucial, whether it was an opportunity to share and dream together, or to learn collectively from an expert.… It's so important to the collective work [we] do every day."

As members worked together they began to accrue benefits. As one member articulated, "The agencies in the CoP are now more aware of our programming offerings and have helped us market our upcoming events," and "I have been in conversation regarding a number of new programmatic partnerships."

Distributed Leadership

Distributed leadership in a CoP is the intentional process of engaging every individual CoP member in working collaboratively toward the achievement of a common goal. It taps the expertise, ideas, and effort of members, providing opportunities for leading at different times and in different ways. When distributed leadership is implemented it creates an atmosphere of trust, ownership, and mutual support (Bennett et al., 2003; Tschannen-Moran & Hoy, 2000). For example, in this CoP, there were members with wide ranges of experience and length of tenure. Providing a newer member with the leadership opportunity of giving a Dvar Torah (a talk about the Torah portion) at a meeting created a culture that recognized everyone's ability to contribute.

"It was a turning point in our CoP when we collectively realized that working together rather than individually would benefit all of us."

A critical tool in the development of distributed leadership is the use of a design team, a representative subgroup that works together to plan and design opportunities to learn with and from one another. The design team allows community members to fully take charge of the community learning agenda and to access individual and collective wisdom, thereby creating their own learning rather than having learning imposed on the group.

At the first meeting, members were given the opportunity to vote on the five key topics they wanted to cover for the upcoming year. This voting process gave the predetermined meeting plan for the year a democratic process and structure that allowed members to voice their interests and find a role to play at each meeting.

For example, at the second meeting, one member presented the Dvar Torah, another member ran a chartering activity, a third member introduced and thanked the speaker, and a fourth member hosted the event in her space.

The realities of a busy group of professionals created challenges in implementing the ideal process of distributed leadership. Rather than convening a separate design team for every meeting, the facilitator asked members individually to contribute to the design of specific meetings that matched their interests, resources, and availability. This flexibility from the facilitator and members created many varied opportunities for leadership.

Chartering Process

Before the first face-to-face meeting it was assumed that the group shared a common vision of family engagement, understood the purpose for collaborating, and would be ready to commit time and resources to participating in the CoP. Indeed for many participants this was the case. However, we were caught by surprise that some members pushed back on committing their efforts until they had more clarity on the vision and direction for the CoP.

Therefore the planning for the second meeting focused on the creation of a community charter. The charter document exercise, provided by the consultant, asked members to create a mission statement, goals, and measurable learning outcomes that would guide the CoP's work. Although creating a charter and visioning may occur later in the life of a community, the facilitator decided that the optimal time to introduce the chartering process based on the needs of this group was early in its development.

The chartering process was powerful and challenging but ultimately rewarding. In the course of the charter conversation the large group discovered that the members used two different terms representing two different paradigms for describing their work. One set of members called their work "outreach," whereas another called it "engagement." This use of different language represented fundamental differences in how they thought about the relationship between young families and Jewish organizations. In the end, the group compromised and included both terms in the charter. This moment of challenge and resolution was an important moment of bonding and learning for the community. The tension in the room during the discussion was palpable, but once the language issues were explored and resolved, the issue did not come up again.

CoP members remarked on the importance of the charter in creating the conditions for collaboration, saying the charter "laid the foundation for working with the other agencies" and "helped us see where we are the same as others and where we are different."

In a midyear survey, members affirmed they felt comfortable talking about their work with others and receiving feedback that could help improve their practice. Under these conditions real learning and collaboration can and did occur.

PHASE III: IMPLEMENTATION PHASE

During the first 12 months, five meetings were held and played an important role in building continuity and a trusting relationship among members of the CoP. Along with creating a trusting environment and community ownership,

the facilitator also needed to provide practical value in each meeting. Professionals are so busy that if the CoP does not provide value, members will not want to commit the time and will not attend meetings, much less give of themselves to volunteer for additional distributed leadership opportunities. Each CoP meeting included a Dvar Torah, family engagement content, sharing of best practices, and some informal networking time to help members reinforce trusting relationships.

It appeared that these efforts were successful: In the midyear survey members noted that they were learning new things from their colleagues and had gained practical information to use in their work. These learnings included information about the best practices and programs that other CoP members were doing, which resulted in new programming ideas, as well as opportunities to jointly sponsor programs. The members also looked for new ways to jointly market and use social media to share their programs with a wider audience.

Lara also discovered that the role of a CoP facilitator is very different from that of a training professional who designs or delivers standardized training material and programs. A CoP facilitator needs to be much more flexible and to release control to the group. He or she is also more of a network weaver (see the article by Deborah Fishman in this issue) and negotiator, dealing with both the professional and relationship issues that come up in the course of the group's development. In addition, although she worked for the CJE, Lara was able to establish her role as a neutral facilitator, which was critical in balancing the power dynamics in the group. As a member stated in the midyear evaluation: "Relationships and support are important to have success. I believe that our CoP would not have formed, grown or survived without a strong, knowledgeable facilitator such as Lara. A facilitator that is not representing any one agency is essential."

The CoP meetings encouraged both formal partnerships and informal networking among professionals who had before competed for the same clients. Three agency professionals had a particularly tense relationship at the start of the CoP. They had attempted to collaborate on previous programs, but had not succeeded because of a feeling of lack of equality among the organizations. After several meetings, these three professionals and, through them, their agencies found multiple opportunities for partnership, which was encouraged by the facilitator and supported by their executives.

An often overlooked and yet critically important aspect of successful CoPs is the time the facilitator spends working behind the scenes. Communities have public spaces, where they meet, and private spaces, where conversations happen between members or with the facilitator that shape the culture and outcome of the public meetings. Lara found that when the community faced a divisive event she had to work behind the scenes to resolve the challenge and build positive momentum for the community. It was critical for her to follow up directly on the comments given in the written feedback or by participants. For complex issues Lara also felt she could rely on Naava for a supportive and objective perspective.

By midyear an opportunity arose to submit a grant proposal to the Jacob and Hilda Blaustein Fund for the Enrichment of Jewish Education. This was seen as an opportunity to meet another objective of the group's charter: the creation of a collaborative project from scratch. At the first brainstorming session it was

challenging for the group to decide on a project that was mutually beneficial and relevant to all agencies. Given the strict time constraints at the meeting and the absence of some members from the meeting, the collaborative project that emerged left some members feeling dissatisfied and undermined their sense of trust in the community. Lara then needed to work for several weeks behind the scenes in one-on-one conversations with members to regain the trust of members and to collect feedback on a new, more widely accepted project for the grant.

After that behind-the-scenes work, Lara was able to bring the members together again for a participatory decision-making process, which resulted in the proposal called "jOYbaby—Sharing the Joys and Oys of Jewish Parenting."[1] This program welcomes new parents and their babies into the Baltimore Jewish community and markets the programs and services available to them through welcome packages and an interactive website. This initiative was chosen because the group realized that, although all of the agencies were serving this population, new parents did not have easy access to all of the opportunities available to them. As of today, the CoP members continue meeting regularly as the focus shifts to project mode around the implementation of "jOYbaby."

CONCLUSION

The Baltimore Family Engagement CoP led members through three phases of collaboration—planning, formation and implementation—that built trust, created a community of shared purpose, and strengthened practice. It worked to strike a balance between finding common ground and maintaining the autonomy and distinctive identity of each agency.

In comparison to other CoPs, the Baltimore Family Engagement CoP seems to have achieved a great deal in record time. However the life-cycle of a community and of relationships is measured in years, not in months, and therefore this community still requires support, facilitation, and resources from the sponsoring agencies and facilitator. One can anticipate that there will continue to be moments of tension and regression among members and that the facilitator will be required to step in to smooth over these moments and continue the forward momentum of the project. As one member explained, "You can't eliminate competition; it is inherent in every human relationship, but spending time, opening up the dialogue and understanding others makes it better. I will say that there is a fine line between collaboration and competition."

As the CoP collaborates on its first joint project, "jOYbaby," there is the realization that new avenues have been created for collaboration, networking, and relationship building. This project will also be a test of how this group can really work together to share resources and make agency commitments that benefit the group over themselves. Even though the community is now in project mode, it will still require community building and continued focus on the goals set out in the charter. There is a plan to convene the directors and members of the Family Engagement CoP agencies to strategize about next steps.

[1]An earlier version of this program, "Shalom Baby" had ceased operation in Baltimore, and this provided an opportunity to revive it in a new format.

The CoP is generating some national interest as well as local interest within the ASSOCIATED agencies. According to Dr. Mark Rosen, a member of the faculty at the Brandeis University Hornstein Professional Leadership Program and a leading researcher in the field of young Jewish family engagement, commented that this is the only CoP of "family outreach professionals" he knew of around the country and that it is a model that should be replicated in other cities. Several ASSOCIATED professionals are interested in adapting this model to other areas of the Baltimore Jewish community.

CoPs can be adapted to other local communities and across other areas of communal work, with the cautionary note that this is not an assembly-line product and therefore differences in context need to be thoughtfully considered, We hope that some of the individual processes described here —a stakeholder analysis, creation of a charter, use of design team or distributed leadership—can be utilized by professionals in other communities and in other forums. In addition we hope that other agencies and communities are inspired to make the serious commitment to pulling together all these processes and the human and financial resources necessary to launch a successful CoP. We believe that the return on investment is well worth the investment in developing a CoP. The words of a participant best sum up its impact: "I personally have come around to a new way of thinking. Baltimore is big enough for everyone. One agency cannot do it all. I actually think that it is great that there are other programs and resources that I can invite people to. It creates a variety of ways for families with young children to connect and thus increases engagement, which, after all, is everyone's goal."

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Jewish Organizations Fight Climate Change

Aligning Actions and Values

Mirele B. ***Goldsmith****, J. R.* ***Rich****, and Rachel Jacoby* ***Rosenfield***

Massive changes are occurring in the earth's climate that will bring unprecedented challenges to bear on communities. Jewish organizations, like other human institutions, are slow to respond to new threats. It is not easy to change an organization's practices, and it is even harder to change its priorities. Is it possible to rouse Jewish organizations and motivate leaders to respond? In this article we describe the Jewish Greening Fellowship, a program that has demonstrated that it is possible for Jewish organizations to incorporate environmental responsibility into their missions, change organizational cultures, and respond boldly to new demands. We give special attention to lessons we have learned about how to help organizations change. The experience of the Staten Island JCC, a participant in the first cohort of the JGF, is described to illustrate the change undergone by one organization.

CLIMATE CHANGE AND JEWISH COMMUNITY ORGANIZATIONS

Organizations are often slow to recognize and respond to new realities. The characteristics of climate change—a problem caused inadvertently by everyone's everyday behavior and resulting in damage that is hard to perceive in the short term—add to the difficulty. In the Jewish community, climate change is usually viewed as an abstract ethical challenge. It is discussed in religious terms such as fulfilling our responsibility to protect God's creation and consider the needs of future generations. The impression sometimes left by this approach is that climate change is irrelevant to our organizations' missions and something that is unlikely to have an impact any time soon.

Mega-storm Sandy, which devastated coastal communities in New York and New Jersey in October 2012 demonstrated that climate change is not a remote threat: In its aftermath, regular activities in the Jewish community came to a halt as every organization was engaged either in recovery or assisting in relief efforts. Jewish organizations with missions as varied as poverty alleviation, care for the elderly, and protecting children are or soon will be challenged by climate change. Increased conflict over water in the Middle East and increased migration from drought-stricken countries will affect organizations that focus on the needs of Jews overseas. And every Jewish organization can expect to experience rising energy costs and increased volatility that will pose a challenge in setting budgets and controlling expenses.

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Rachel Jacoby Rosenfield *serves as Director of Experiential Education at the American Jewish World Service. Formerly, as Director for Program Development and Jewish Life at the Riverdale YM-YWHA, she catalyzed an environmental initiative that became the basis for the Jewish Greening Fellowship, which she co-founded and directed until 2012.*

Of course, a crisis is also an opportunity. Jewish organizations that take action now safeguard their own future, they demonstrate leadership, and they earn the goodwill of their communities. They demonstrate that Judaism and Jewish institutions have something to offer individuals and communities facing some of today's most vexing issues.

THE JEWISH GREENING FELLOWSHIP

The Jewish Greening Fellowship (JGF) was funded by the UJA-Federation of New York Jewish Community Development Task Force of the Commission on Jewish Identity and Renewal and developed by the Isabella Freedman Jewish Retreat Center to mobilize a Jewish response to climate change. The goal of the 18-month program is to develop environmental change leadership that enables the 18-20 JCCs, camps, synagogues, health and human service organizations, and day schools in each cohort to integrate environmental responsibility into everyday decision making. Those organizations receiving the grant are required to appoint a staff member, the Jewish Greening Fellow, to lead the change process; he or she is expected to spend four to six hours per week on greening activities. The JGF provides 14 days of leadership training for the fellows over the 18-month period to build their skills as leaders, give them the knowledge to serve as in-house experts on sustainability, and introduce them to local resources. Most importantly the fellows benefit from being part of a group. Organizations in the first two cohorts received a grant of between $15,000–20,000 to support the fellow's salary and provide matching funds for energy efficiency improvements and programming.

Although enabling the fellow to lead the change process is the main focus of the JGF, several elements of the program are designed to engage others in the organization as well. Each organization is required to create a green team. Instead of receiving the grant in one lump sum, each organization must make proposals to increase their sustainability practices at three points during the 18-month program. Fellows are encouraged to bring other staff members to training sessions. Finally, JGF convenes periodic meetings for executive directors and other senior leaders at which they share ideas with their peers.

In February 2013 a third cohort of the Jewish Greening Fellowship was launched. With this addition of 20 new organizations, the JGF has become a network of almost 60 organizations leading the way in mobilizing a Jewish response to climate change. It provides a model for how other communities can tackle this formidable challenge.

Each organization sets goals in three areas: reducing energy use, making operations more sustainable, and engaging and educating the community.

CHANGES BROUGHT ABOUT IN JGF ORGANIZATIONS

The overall goal is that each organization integrate commitment to Jewish values of stewardship into its mission. In concrete terms, each organization sets goals in three areas: reducing energy use, making operations more sustainable, and engaging and educating the community.

Reducing Energy Use

According to the U.S. Energy Information Administration, buildings consume almost half of all the energy used in the United States. JGF organizations are

required to undergo an energy audit that identifies opportunities for energy efficiency. Usually these audits are available for free or at reduced cost through government programs.

With the results of an audit in hand, JGF organizations are able to apply for government and utility programs that pay for energy efficiency improvements. To date, every JGF organization has implemented energy efficiency projects, such as replacing lighting fixtures with energy efficient models, installing programmable thermostats and motion sensors, and insulating air conditioning units. In addition, JGF organizations have installed or are in the process of installing six solar energy systems.

Sustainable Operations

The production and disposal of everything that organizations buy and use have an impact on the environment, and there are many opportunities for organizations to reduce the amount of waste and pollution resulting from their operations. Most of the 37 JGF organizations in the first two cohorts were not separating recyclables before participating. Now they are. More importantly, they have learned that it is even better to reduce than to recycle. Many JGF organizations have reduced paper use by eliminating unnecessary printing of newsletters and calendars—saving tens of thousands of dollars. Twenty-one organizations have reduced the use of toxic cleaning products by instituting green cleaning procedures. Jewish Home Lifecare, a geriatric health care agency, is developing a green procurement policy. JGF organizations have found it particularly challenging to address waste in food service, but they have made strides in this area. The Educational Alliance has instituted the collection of kitchen grease (collected by a green jobs program for formerly homeless men). The YM & YWHA of Washington Heights and Inwood eliminated disposables from the daily lunch program for 200 seniors. All of these changes save money as well as reduce waste.

Jewish Environmental Programs and Community Education

Concern for environmental stewardship adds a new and inspiring dimension to organizations' Jewish programming. For example, members of Congregation Beth Elohim claim that a "green kiddush" served on china, rather than disposable dishware, enhances the Shabbat atmosphere. At the Riverdale Y, a Purim costume swap both provides an alternative to purchasing a product that will be used only once and builds community. Members of the Reconstructionist Synagogue of the North Shore can request a home energy audit provided by the Long Island Progressive Coalition, a developer of green jobs.

Reflecting a trend in the broader community, JGF organizations are enthusiastically embracing gardening. In the most recent JGF cohort, 17 of 18 organizations established a garden. Gardening is fun, hands-on, and can engage children, families, and seniors. Garden programs enrich holiday celebrations with an understanding of the agricultural roots of Jewish customs. Donating produce to a local soup kitchen demonstrates Jewish values in action. Gardening also provides an opportunity to educate about the impact of the food system on climate change and to become involved with advocacy for food justice.

LESSONS LEARNED ABOUT CHANGE

Organizational change initiatives frequently fail for lack of a sense of urgency. Organizations may have applied to the JGF because they needed money, to please a funder or board member, or to offer a professional development opportunity to a staff member— but often lacked a sense of urgency about engaging in greening projects. In addition, many fellows began the JGF without a passion for the issue of climate change. However, we have been impressed with how they have developed this sense of urgency. We believe that they did so because the training effectively combines experiences that have an emotional impact with the intellectual exploration of environmental issues. The sense of urgency helps fellows stay the course despite the inevitable obstacles they encounter. The sense of urgency and the commitment that fellows develop have yielded another benefit: In contrast to what we have observed in other fellowship programs, there have been a high level of trust and little competition between the fellows.

Yet even the most passionate and effective fellow cannot change an organization by him- or herself: A successful effort must have the support of senior leaders and a team of people in a variety of positions in the organization. In the second cohort we therefore made several changes designed to engage more people in the change process. We encouraged organizations to send additional staff members to specific training sessions. We held additional meetings for the executive director and other senior leaders. Finally, after experiencing a high level of fellow turnover in the first cohort, we instituted a requirement that each organization identify a person to replace the fellow if he or she leaves during the term of the fellowship.

Although the broad scope of environmental issues and solutions means that the environmental agenda overlaps with the mission of every organization, we have learned that change takes hold when organizations find their "sweet spot"—that is, projects that further the mission of the organization, provide financial benefits, and contribute to a healthier, safer planet. For the Central Queens Y the sweet spot is an annual Environmental Fair that brings 500 people to the Y. For the Educational Alliance, it is a therapeutic gardening program that has attracted corporate support. For the Sid Jacobson JCC, it is a nature program that has become the centerpiece of the day camp. For the Staten Island JCC, described later in this article, the sweet spot is generating solar energy on-site.

Change takes hold when organizations find their "sweet spot"—projects that further the mission of the organization, provide financial benefits, and contribute to a healthier, safer planet.

The experience of the JGF demonstrates that a bold effort can mobilize Jewish organizations to take significant steps to address the moral and practical challenges posed by climate change.

CASE STUDY OF THE JCC OF STATEN ISLAND

The JCC of Staten Island participated in the first cohort of the Jewish Greening Fellowship, which began in 2009. Since then the JCC has embraced greening as central to its *mission* as a Jewish agency. The JCC has raised $980,000 to support greening projects and has been recognized as a leader in New York City for its efforts on behalf of sustainability. J. R. Rich, the Greening Fellow, led the Green Team at the JCC with the support of the executive director, David Sorkin. As the JCC was transformed, Rich experienced his own transformation. Inspired by learning about Jewish teachings about the environment and social justice, he began to study for conversion. He is now a Jew.

Reducing Energy Usage

Only an agency with a healthy bottom line can fulfill its mission, and so the JCC started by asking how it could reduce its energy bill. Although its facility was only 3 years old when it applied to participate in the Jewish Greening Fellowship, an energy audit revealed many areas where energy usage could be reduced. A board subcommittee reviewed the recommendations contained in the audit report and chose which ones to implement. Some were easy, such as engaging an energy service company (ESCO) to purchase power on the open market and enrolling in a demand-response program with the local utility. Others were more ambitious. At the request of the JCC's Facilities Director, it decided to install an energy monitoring system that would allow oversight of energy usage in real time throughout the facility. These three steps have saved the JCC an estimated $40,000–50,000 since implementation.

The JCC also implemented lighting upgrades in three of its facilities, two of which it owns and one it leases. The cost of these upgrades was $49,000, for which it received almost $19,000 in funding from the New York State Energy Research and Development Authority (NYSERDA); it is estimated that these upgrades will save $23,000 annually. The JCC also received a grant of $4,000 from the Jewish Greening Fellowship to replace the pool bypass pump and install water-saving showerheads in the locker rooms. These improvements will save $3,800 per year.

The JCC decided to go beyond saving money and reducing its impact on the environment through energy efficiency to generating renewable energy. It decided to install two different solar power systems: s solar thermal hot-water heating system and a photovoltaic (PV) system that generates electricity. The solar thermal system was installed in October 2011 at a cost of $170,000 and is reducing the JCC's natural gas usage by 75% annually. In addition it has eliminated member complaints about the lack of hot water and reduced time and cost for maintenance to zero. The PV system costs $750,000 and, when installed in the coming months, will generate nearly $30,000 in annual savings. Because the JCC raised all of the money required to install these systems from a combination of public and private sources and there is no payback period, it benefits from the entire savings they generate from day one.

Sustainable Operations

The Staten Island JCC has instituted many changes to reduce waste and pollution resulting from its operations, thereby enhancing its service to its members, protecting the health of the community, and saving money. Changing cleaning products to nontoxic hydrogen-peroxide-based cleaners allowed it to assure parents that their children are in a clean, safe environment. It adopted EPA guidelines regarding pest control using proactive preventive steps such as storing food in pest-proof containers. It also beautified the campus and enhanced the natural environment by planting more than 185 trees provided by the City of New York.

Reducing paper use was a bigger challenge. Staff and members needed to adapt to new methods of communication. To allow time for this cultural change, the JCC implemented the plan to reduce paper use over a two-year period. Members were given many notices that change was coming, and an email blast system

was set in place to distribute time-dependent information. At the end of the two years, the monthly bulletins and program guides were eliminated. The JCC began printing forms on an as-needed basis, switched to double-sided printing, and reset default margins for word processing. Taken together these changes are realizing about $35,000 in savings per year.

Jewish Environmental Programs and Community Education

Led by a strong, diverse Green Team, the JCC has incorporated environmental programming and education into all of its departments. For example, seniors and preschool children participated in an intergenerational art project using recycled materials. An annual Earth Day Fair has enabled the JCC to develop partnerships with community organizations involved in composting, gardening, and recycling. The fairs were cosponsored with Chabad, which helped engage the Orthodox community.

One of the most exciting aspects of the JCC's commitment to greening has been the recognition it has received in the community as a leader in sustainability. It has hosted electronics and textile recycling events and given away 400 trees, all on behalf of city agencies. It has been asked to share its expertise by participating in community environmental task forces and organizations.

Leading Change at the JCC of Staten Island

What explains the success of the JCC in rising to the challenge of integrating environmental responsibility into its mission and culture? Certainly one factor is the sense of urgency cultivated by the executive director. The JCC's energy bill was $500,000 per year. When the Greening Fellow came to him with ideas for reducing that bill, he got on board. "To be honest," he recalls, "I started out looking at this as a strictly dollars and cents issue. But as we went on I came to see the value of stewardship, saw how this fit in with our mission of ethical and moral responsibility of doing good deeds and a sense and passion for social justice. We have built an organizational vision for environmental sustainability."

The JCC of Staten Island's... commitment to take bold steps to protect the planet has become a point of pride to the staff and community.

With the executive director on board, a diverse Green Team was created with representatives from many departments within the JCC. Although the Greening Fellow played a leadership role, other members of the staff took on responsibility for greening projects. Representatives from nearly every department volunteered to serve on the Green Team, and staff had a personal interest in these issues and had ideas on how to "green" the agency, Staten Island, and beyond.

For the JCC of Staten Island, the "sweet spot" has been solar energy, which will reduce its energy costs for decades to come. Installing these systems has brought it recognition as an innovative organization and community leader. Finally, its commitment to take bold steps to protect the planet has become a point of pride to the staff and community. It is now planning a solar parking garage that will be the largest in the New York-New Jersey area.

The JCC of Staten Island has risen to the challenge. Inspired by the Jewish Greening Fellowship it is responding boldly to the reality of climate change, strengthening the organization in the present and preparing for the future.

CONCLUSION

In the aftermath of Hurricane Sandy it is clear that climate change is happening, and it is happening to us in the Jewish community. The experience of the Jewish Greening Fellowship demonstrates that Jewish organizations can rise to the occasion and respond boldly to this existential crisis if they are provided with a framework that supports them in systemic change. Key elements of this framework are cultivating a sense of urgency, making it someone's job to lead the change process, obtaining commitment from organizational leaders, helping organizations to identify the overlap between environmental responsibility and their missions, and engaging both key staff members and senior leaders in a supportive group process. The example of the JCC of Staten Island illustrates that taking a stand and taking action yield numerous benefits. The JCC has reaped significant financial savings, energized its staff, engaged new constituencies, and received recognition as an innovative organization.

Jewish organizations will only benefit by rising to the challenge of climate change. Our world will only benefit by Jewish organizations taking the lead: "And unto your light, nations shall walk, and kings unto the brightness of your rising" (Isaiah 60:3).

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Estimating the Jewish Student Population of a College Campus

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Providing Jewish services is usually accomplished within Jewish organizations. Gaynor (2011), however, makes a cogent argument that concentrating on "Jewishly exclusive spaces" misses an opportunity to reach Jews where they are, embedded in broader organizations. His focus is on education, as is ours, but the idea need not be confined to this arena of social action. As the boundaries between Jews and non-Jews become blurred in myriad ways (cf. Alba, 2006) in contemporary society, developing methods for disseminating services to Jews within broader organizations is becoming increasingly important. Hillel is an organization that has long done so, embedding itself on college campuses of the broader population and seeking to provide services to all Jewish students in that population. However, determining the types of services to provide and for how many students is often challenging, because many Jewish students blend in with the broader population and do not self-identify in any visible manner. This article discusses alternative methods for estimating the Jewish student population to better tailor services to their needs.

A simple inquiry to the senior author from one university's Advancement Director presented a challenge: Did we have an estimate of how many Jewish students attend Rowan University? A donor was interested in establishing a Hillel Jewish Student Center at this university, but wanted to be certain that enough Jewish students attended to warrant such an investment.[1] Because we expect that many campuses may be faced with a similar challenge, given the perceived desirability of Jewish students on campus (Klugerman, 2010; Redden, 2008) and the subsequent impetus to improve campus services for Jewish students, we decided to summarize and review many of the strategies available for assessing the number of Jewish students on any particular campus. We hope that the discussion will be beneficial to others who are challenged to estimate other Jewish subpopulations whose identification may otherwise remain hidden.

As the boundaries between Jews and non-Jews become blurred... developing methods for disseminating services to Jews within broader organizations is becoming increasingly important.

Before embarking on a discussion of the various suggested methodologies, note that one of the difficulties of estimating the size of a Jewish student population is defining whom to count as a Jew. Although Judaism is a religion and many Jews identify religiously as Jews, Jews may also identify ethnically as Jews without identifying with the religion. Therefore surveys that seek to identify Jewish

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[1]The authors were inspired by a lively discussion on this topic on the listserv of the Association for the Social Scientific Study of Jewry that took place May–July, 2010.

identification from answers to a question on religious preference may underestimate the number of Jews in a population (Kosmin et al., 2001; Kotler-Berkowitz et al., 2004; Tighe et al., 2010). For example, Kosmin et al. (2001) found that, of all adults who could be classified as Jewish either by religion or culture, only about half (53%) self-identified as Jewish when asked about their religion.

Social scientists studying the Jewish community have asked a variety of questions: "Are you Jewish?" "What is your religious preference"? "How do you define yourself ethnically?" "Do you consider yourself Jewish in any way?" "Is your mother Jewish?" and "Is your father Jewish?" Research has shown (e.g., Klaff, 2006; Mott & Patel, 2008) that the manner in which the question is asked affects the count.

What definition of Jewishness is most appropriate for the purposes of establishing a Hillel? Many involved in Hillel or other Jewish programming efforts on college campuses recommend a broadly inclusive definition that includes anyone who self-identifies as a Jew (Kosmin, 2010; Segal, 2010; Sternberg, 2010a), even though some Jewish subpopulations might not accept such an inclusive definition. The argument is that, because Jewish students on any given campus are heterogeneous, as wide a tent as possible should be used to encompass them all, especially on campuses where Jewish identity is sometimes hidden or where Jewish students are a very small minority.

This article reviews and discusses the strengths and weaknesses of seven strategies for estimating the number of Jewish students on a given campus:

1. using university-administered surveys
2. using a specially designed telephone survey
3. using a specially designed Internet survey
4. using a snowball sample
5. surveying faculty informants
6. collecting information about the Jewish population in the geographic areas from which most students derive
7. counting the number of students with distinctive Jewish names (DJNs)

Finally, we assess the value (or lack thereof) of such a population estimate, particularly when the purpose of the estimate is to provide input to the decision concerning the establishment of a Hillel.

ESTIMATION STRATEGIES

Strategy Number 1: Using University-Administered Surveys

The first strategy uses surveys of students administered by the university that query religious preference. The Cooperative Institutional Research Program (CIRP) longitudinal freshmen survey, administered by UCLA's Higher Education Research Institute (HERI) (http://www.heri.ucla.edu/herisurveys.php), is the most established and most popular of these surveys. CIRP collects religious preference and parents' religion from first-year students at the beginning and end of their freshman year and from seniors at graduation. Campuses may choose to participate in any or all of these surveys (for a fee). Of course, not all students will cooperate with these surveys, but they usually provide a reasonable estimate of the number of Jewish students.

Some universities administer their own surveys. At the University of Miami, for example, students complete an optional religious preference form when they

enroll. One drawback is the optional nature of the survey. Based on years of querying students active in the University of Miami Hillel whether they completed the religious preference form, University of Miami Hillel leaders estimate that no more than 50% of Jewish students do so (Sheskin, 2010).

It should be noted that using *freshmen* surveys to estimate the number of Jewish students, however, requires some assumptions regarding Jewish student retention compared with other students. Jewish students disproportionately aspire to attend graduate and professional school, are more likely to be residential students than commuter students, and are more likely to come from highly educated and economically advantaged households (Sax, 2002). These factors almost certainly imply that Jewish students exhibit higher retention and graduation rates than do other students. In fact, this is a primary motivator for universities to be interested in recruiting Jewish students (Redden. 2008). Because Jewish students typically complete college (more than 70% of Jews under age 45 have an undergraduate degree) (Hartman & Hartman, 2009, p. 16), they are likely to form a higher percentage of the sophomore, junior, and senior classes than of the freshmen class. Thus, freshmen surveys may underestimate the total number of Jewish students on campus, unless adjustments for retention are made.

Note as well that if the university is planning to survey all students (or all freshmen or all seniors), the possibility exists that the designers of that survey may agree to add a "rider" question or two to their survey. For example, at the University of Miami, all graduating students are required to complete the "Graduating Student Survey." A question or two on religion/ethnicity could easily be added to such a survey and would probably achieve a very high response rate. This would allow an estimate of the religious and/or ethnic composition of graduating seniors, which could be extrapolated to the rest of the student population. This "rider" question strategy can apply to written surveys, telephone surveys, or Internet surveys alike.

Strategy Number 2: Using a Specially Designed Telephone Survey

The second strategy to assess the number of Jewish students on a campus is to conduct a telephone survey asking whether students are Jewish. Although telephone surveys sometimes suffer from low response rates (Keeter et al., 2006), response rates may be expected to be somewhat higher among college-educated populations (Johnson n.d.). This strategy might work on a relatively small campus, but with more than 9,500 students at Rowan University, a random sample of about 375 students would be necessary to estimate the number of students within plus or minus 5% (at the 95% confidence level). This would obviously be time consuming and expensive. One could perform a random-digit dialing (RDD) survey of the exchange codes for the dormitories, but this would not yield an estimate for commuter students. Even if the registrar agreed to release telephone numbers for commuter students (and privacy rulings may obviate this), not all students will have registered with the university the telephone number they actually answer. They may have listed their parent's home telephone number, but not their cell phone number. Further, the widespread use of caller ID may reduce the number of responses by enabling students to identify that it is a stranger calling. Yet another problem is that some new university dormitories do

not have land-lines. Finally there is the possibility that Jewish students might be more or less likely than other students to respond to a telephone survey.

As an example of such a survey, at the University of Connecticut in the 1970s, Dashefsky (2010) enlisted students to conduct a survey of undergraduates to determine the religious composition of the student body. The University of Connecticut's Bureau of Institutional Research provided a 5% random sample of undergraduates. With Dashefsky's guidance, the students developed a questionnaire and estimated that there were 1,450 Jewish undergraduates (about 13% of the student body). This was an educational exercise for the student interviewers and produced useful information. Of course, conducting such a survey today presents its own challenges, as mentioned above, particularly with respect to cell phones and caller ID as well as new privacy rules, which might mean that the university may not provide phone numbers to a researcher. If feasible, however, a large enough telephone survey may provide a reasonable estimate.

Strategy Number 3: Using a Specially Designed Internet Survey

The third strategy can be used if a university is willing to provide e-mail addresses for students or is willing to permit access to the student Listserv. Internet surveys may generate more responses than a telephone survey (30–60%, according to Johnson n.d.), but this higher response rate comes at a price. With a telephone survey, once a student is reached, the cooperation rate is likely to be quite high. Internet surveys, although sometimes achieving responses from a large number of persons, produce a self-selected sample, and it is hard to argue that this sample is a random sample of the student population, thereby precluding inference from the sample to the population. Although all types of surveys suffer from nonresponse bias due to the fact that not all potential respondents cooperate, survey methods with no human contact (Internet, mail) are much more likely to suffer nonresponse bias than methods involving human contact (personal interview survey, telephone survey). It is much easier to ignore something in your mail or your e-mail than when someone visits you personally or contacts you via telephone.

Three major advantages can be cited for an Internet survey over a telephone survey. First, the cost of an Internet survey is considerably lower than the cost of a telephone survey or even a mail survey. Although professional time is still needed to design and program the questionnaire and to analyze the results, Internet surveys have no interviewer costs, no mailing costs, no cost to reproduce a questionnaire, and no data input costs. Second, an Internet survey can be designed, executed, and analyzed within a relatively short period of time. Third, although the results do not permit inference to the entire student population, certainly the survey will produce an estimate of the *minimum* number of Jewish students on campus. Suppose 9,500 e-mails with links to the survey are sent and 4,000 students respond (42%). Suppose that 10% (400) of the students are Jewish. Although one might argue that we cannot infer that the 10% can be applied to the 9,500 to produce an estimate of 950 Jewish students, there is no doubt that there are at least 400 Jewish students at the university and in all likelihood many more.

Contributing as well to the inability to infer to the population is the possibility that Jewish students might be more or less likely than other students to respond to an Internet survey.

Strategy Number 4: Using a Snowball Sample

The fourth strategy is the use of a snowball sample. Whether an initial contact is made by telephone, Internet, or in person with active Jewish students, students who self-identify as Jewish may be willing to identify others as Jewish, creating a snowball sample (Israel, 2010) that would result in a statement that, at a minimum, __ number of Jewish students attend the university. This procedure would also produce some names and addresses useful to a Hillel mailing list in the future. It may also be possible to start the snowball with the membership lists of clubs that are known to have many Jewish members (such as the College Democrats[2]) or with class lists of Jewish Studies courses that could be assumed to attract a disproportionate number of Jews. Unless it is a small campus, such snowball samples are unlikely to generate a good estimate of the total number of Jewish students on campus (see discussion and criticism of respondent-based sampling in Goel & Salganik, 2010; Heckathorn, 2002; and Salganik & Heckathorn, 2004); they will, however, provide a base on which to plan programming.

Strategy Number 5: Surveying Faculty Informants

A fifth strategy is to survey (known) Jewish professors for estimates of the number of Jewish students in their classes. This may yield very biased estimates depending on whether opportunities arise in their classes for students to make their identity known. For example, when the first author teaches a Sociology of Religion course, such occasions clearly occur. When she teaches Comparative Education, she relates her Israeli experience to the class, which often elicits a response from Jewish students. When the second author teaches Jewish Geography and students make PowerPoint presentations, almost every student reveals whether they are Jewish. Colleagues teaching Women in Judaism or World Religions invariably learn the religions of many of their students. Any Jewish faculty member canceling classes on Jewish holidays will also likely learn the religion of their students. But not all professors do so, and their subject matter may not be as conducive to students revealing their identity. Further, many students see religion as a private or family matter, separating it from their academic experience, especially if Jewish students have not had a presence on a campus heretofore. All faculty have probably had the experience of thinking a student was Jewish who was not, or vice versa. Nevertheless, faulty as they may be, faculty estimates may be better than no information at all.

Faculty estimates may be improved by weighting them according to the probability of Jewish students enrolling in their classes, given information on the majors selected by Jewish students. According to Sax's American Jewish Freshmen survey (2002), the most popular majors among Jewish freshmen are business, social science, history/political science (prelaw), biology (premed), and humanities. In 2000–1, the most common occupations of Jewish men also included engineering, which should probably be added to the list of popular majors of Jewish students (Hartman & Hartman, 2009). As Jewish occupational aspirations change (Chiswick. 2007; Hartman & Hartman, 2009), this list can be adjusted.

[2]Thanks to Larry Sternberg (2010a) for inspiring this strategy.

Further, because Jews have higher proportions in premed and prelaw majors, it is important to identify such at any particular university (A. Glicksman, 2010). Complicating this methodology, of course, is the fact that many courses are taken by nonmajors.

Strategy Number 6: Collecting Information About the Jewish Population in the Geographic Areas From Which Most Students Derive

The sixth strategy is to examine estimates of the proportion of Jews in the general population of the catchment area of a particular university. For example, for the area from which Rowan University draws most of its student body, *Current Jewish Population Report 2011-Number 3* (Sheskin & Dashefsky, 2011) estimates that 5.6% of New Jersey's population is Jewish, as is 2.3% and 1.7% of the two neighboring states, Pennsylvania and Delaware. This report lists the Jewish population of about 900 different geographic areas, facilitating analysis for smaller geographic units.

However, several problems exist with this approach. First, Jews are more highly represented among the educated population, and the more highly educated population sends a higher proportion of their children to college. More than half of American Jews aged 25 and over have completed a college degree, compared with less than 30% of Americans in general (Hartman & Hartman, 2009). As Kadushin and Tighe (2008) remind us, 72% of non-Orthodox Jews and 50% of Orthodox Jews under age 30 have attended or are attending college, compared with about one-third of all Americans (NCES 2008). Rowan University draws about one-third of its students from first-generation college students, which may indicate a lower number of Jewish students.

Second, the majority of Jewish college students attend college away from home (Kadushin & Tighe, 2008, p. 2), so they may or may not be attending university in their "region of origin."

Third, the Jews in a region may congregate at a few chosen universities, so no expectation exists that, if a given university's catchment area is X percent Jewish, then X percent of students at each university in that area are Jewish. The 5,000 Jewish students at Rutgers University in northern New Jersey is the third highest number among public universities in the nation according to *Reform Judaism Online* (Steiner, 2008). The University of Pennsylvania, just a half-hour's drive from Rowan University, has an estimated 2,800 Jewish students, the seventh highest in the nation. New York City and College Park, Maryland, all within two hours, have six private and two public universities on the "top 60" list of Jewish student populations.[3] These competitors might well reduce the number of Jewish students at other universities in the area. Yet, this list of the 60 top universities in terms of number of Jewish students is based on estimates from Hillel, which may be inflated (Kadushin & Tighe, 2008).

To hone the estimate of the number of Jewish students in an area who enroll in a particular university, it might be possible for the local Jewish Federations (perhaps in conjunction with Hillel) to ask synagogues in the area to forward information about where high school seniors plan to attend college. This could

[3]Thanks to Randal Schnoor for bringing this list to our attention (Schnoor, 2010).

provide some idea of the proportion of Jewish students going to any particular college as well as names and contact information.[4]

Strategy Number 7: Counting the Number of Students With Distinctive Jewish Names

The final strategy, and the one that may be the most controversial, involves counting the number of students with Distinctive Jewish Names (DJNs) and adjusting by an "expansion factor" to reach a ballpark estimate. Seasoned researchers, including the 2007 and 2010 Marshall Sklare Award[5] recipients, have advocated for this strategy (Barry Chiswick, Steven M. Cohen, Ira M. Sheskin, Joshua Comenetz, and others). The first author of this article, but not the second, was already a skeptic, because all university professors have had embarrassing episodes when assuming that a particular student was Jewish (from his or her name and other "clues") and that student was not. We now summarize some of the arguments supporting and detracting from the use of DJNs.

Using DJNs to estimate a Jewish population has a long history (Kosmin & Waterman, 1989). Recently, Chiswick (2009), in his 2007 Sklare Memorial Lecture, used DJNs to study the "rise and fall of the American Jewish Ph.D." As he relates,

Himmelfarb et al. (1983) [Himmelfarb, Loar & Mott. 1983] attribute the DJN technique to Samuel C. Kohs in 1942 [Kohs & Blumenthal, 1942] and report the results of several studies that the list of 35 names (the names used here except for Schwartz) are held by 11–15 percent of Jews, with about 90 percent of individuals with these surnames being Jewish. If these proportions still hold, and if receipt of the Ph.D. among Jews is independent of their surname, it suggests that the number of Jews receiving the Ph.D. is seven to nine times greater than the number of DJN Ph.Ds. Himmelfarb et al. (1983) compare the socio-economic and demographic characteristics of those on the DJN list with other Jews in the 1971 National Jewish Population Survey and conclude that the differences "were quite small." The DJNs differ by only a little from the other Jews in terms of ritual observance and Jewish identification. Jews identified from organizational membership lists (e.g., synagogue memberships, [Jewish] Federation lists, etc.) differ more from Jews not on these lists than DJNs differ from other Jews (Chiswick, 2009, p. 71).

The main objections to the DJN strategy include (1) its imprecision; (2) Jews changing their names, especially as they assimilate; and (3) intermarriage. Chiswick continues his discussion:

A more recent study of the pros and cons of the use of the 36 DJNs is by Sheskin (1998a). In this study, a person is identified as Jewish if the person's surname is on the DJN list. This, of course, results in two types of errors. One error is identifying as Jewish individuals

[4]Although suggested by the Hillel director at Brandeis University, Brandeis Hillel does not employ this method, since their catchment area is more national than that of Rowan University. However, they do obtain an estimate of the number of students who intend to attend Brandeis from the local Jewish day schools (Sternberg, 2010b). Although this estimate would probably only provide a very partial list of Jewish students intending to come to the university, it can serve as a springboard for engaging incoming students in Hillel programming.

[5]The Marshall Sklare Award is given annually by the Association for the Social Scientific Study of Jewry to a senior scholar who has made a significant scholarly contribution to the social scientific study of Jewry (see www.assj.org for a list of recipients).

with a surname on the list who are not Jewish, whether or not the person may have had a Jewish ancestor. An example would be the former Senator from Maine and Secretary of Defense, William Cohen. The second error is missing Jews who do not have a DJN. An example would be the 2007 Sklare Award recipient [Barry Chiswick]. Expanding the DJN list of names reduces the second error (missing Jews), but increases the first error (incorrectly identifying non-Jews as Jewish).

Other problems with the DJN technique include name changes due to marriage. The check for DJNs among middle names is intended to identify Jewish women whose original surname is a DJN and is used as a middle name, but whose current surname is not on the list. In this instance marriage is a two-edged sword. A former colleague, Cohen, changed her name to O'Neill upon marriage before completing her PhD, and would not be identified as Jewish, while non-Jewish women adopting a DJN husband's surname would be so identified. Moreover, the DJN list focuses on Ashkenazic names, and hence Sephardic and Israeli names would not be identified, although most American Jews are of Ashkenazic origin (Chiswick, 2009, pp. 122-123).

Note that to some extent name changing to DJNs is probably balanced by name changing from DJNs. Many of these objections to using DJNs have been discussed in Kosmin and Waterman (1989) and in Phillips (2007).

In his dissertation, Phillips (2007) examined the 2005 Boston Jewish Community Study to determine how well DJNs predicted the Jewish population. He found that they represented about 12% of the Jewish population and that 92% of those with DJNs were Jewish. He also studied "ethnic names," finding that they represented 27% of the Jewish population in Boston and that 70% of those with ethnic Jewish names were Jewish. His conclusion was that DJNs were helpful as a supplementary frame for most surveys of Jews (Phillips, 2010).

Phillips' analysis shows that, although DJNs cannot necessarily predict whether a given individual is Jewish based solely on name, the method predicts rather well the incidence of Jews in a large sample of persons.

The usefulness of DJNs to predict the Jewish population also varies both temporally and spatially. In the Midwest, due to the large German-origin population, there are more non-Jews with DJNs than in other areas of the country. In New York, the name "Cohen" is found among non-Jewish African Americans. Russian Jews will be undercounted by DJNs, too, because of Russified spelling (e.g., Rosenboym, Finkelshteyn).

And because the DJN list is mostly Ashkenazic names, it will fail to identify the proper number of Jews in areas with large non-Ashkenazic Jewish populations. Sheskin has provided a list of common Sephardic Jewish names to supplement the list of common DJNs (see Appendix) (Sheskin, 1998b). In his Twin Cities Jewish community study, he added common Jewish Russian first names (RJNs) to his sample (see Appendix). About 50% of the households called using RJNs were Jewish households (Sheskin, 2004, pp. 2–5).

As others have mentioned, intermarried Jewish women will be undercounted by DJNs, as will their children (although the extent to which name changing has actually occurred has been underdetected by researchers) (McGinity, 2009, pp. 12–13). Fermaglich (2008), in her work on American Jews and name changing from 1930 to 1960, is one of a handful of researchers studying the phenomena. She shows that "through the middle of the 1950s, Jewish names

were represented disproportionately among names being changed legally in New York City" (Fermaglich, 2008, p.1). "Ultimately, name changing was a strategy that permitted Jewish families to attain and strengthen their position in the American middle class, but that position came at psychological cost and at the cost of disapproval from other Jews" (Fermaglich, 2008, p. 2). Fermaglich also notes a small but notable minority of Jews returning to older ethnic names to address communal disapproval (Fermaglich, 2008, p. 10).[6]

To gauge "local field conditions" at a particular university, a number of suggestions are offered:

1. Obtain estimates of the DJN "expansion factor" for the part of the country in which any particular university is located by obtaining lists of members from several synagogues or the local Jewish Community Center or Jewish Federation to gauge the proportion of Jews who hold a DJN (Cohen 2010). In the absence of an ability to do this, assume that between 8 to 12% of Jews have a DJN, leading to an expansion factor between 8.2 and 12.5, values that has been validated in previous research. Note that this is only relevant if a very large percentage of the student body derives from the local area.

2. If a scientific random-digit dial (RDD) demographic study has been conducted in the area, count the number of DJNs in the phone book of the population study area and develop an expansion factor between the DJN count and the RDD estimate of households. Sheskin and Dashefsky (2008) used a similar technique to estimate the number of Jews in counties surrounding San Antonio, when no population study had been completed in these particular counties.

(Note, however, that these first two suggestions are subject to the same qualifications discussed in Strategy #6. That is, there is no reason to expect that a particular university population reflects the local Jewish population.)

3. Obtain an estimate of the number of students with a DJN at a neighboring campus (most universities have a student directory online) that has a Hillel. In Florida, statewide Hillel funds were allocated by counting DJNs at each university serviced by the Florida Hillel Council. Universities with higher DJN counts almost certainly have greater numbers of Jewish students. Imagine a situation where a campus in a nearby section of the state has a university-administrated survey that shows about 1,000 Jewish students. If their student telephone directory

[6]Thanks to Keren McGinity (2010) for bringing this research to our attention.

[7]Many thanks to Steven M. Cohen and Mordecai Walfish for providing references to articles posted online at the Berman Jewish Policy Archive (www.bjpa.org).

TABLE 1. Relative advantages of alternate methods of determining number of jews in a given subpopulation (1=best ranking)

Method	Accuracy	Cost	Speed	Intrusiveness
Secondary analysis of existing survey	1	1	3	1
Specially designed telephone survey	1	7	4	4
Specially designed Internet survey	2	2	2	3
Snowball sample	2	6	4	4
Informants	5	4	2	2
Estimates from neighboring Jewish population	5	5	4	2
Distinctive Jewish Names	4	3	1	1

has 100 students with a DJN and the telephone directory for the university in question has 200 such students, a good ballpark estimate for a nearby campus would be about 2,000 Jewish students (Sheskin, 2010).

4. Validation of the DJN estimate: Contact the DJN students and inquire as to whether they are Jewish (and do they know anyone else who is) or check them out on Facebook (Cohen 2010).

Publicly available DJN lists include Cohen's (1987) list of 109 DJNs and Sheskin's (1998a) list of 36 names. Both lists are reproduced in the Appendix. as are Sheskin's (1998b) list of Distinctive Sephardic Jewish names (DSNs) and Sheskin's (2004) list of Russian Jewish first names (RJNs).

Sheskin has a proprietary list of 375 DJNs (plus 30 Distinctive Jewish "endings," such as "berg" and "owitz"), which can be searched in a computerized phone book, that he uses to identify potential DJN households to be interviewed, but he cannot use these to estimate the number of Jews (Sheskin, 2010). Although the list of 375 DJNs is useful when trying to identify all potential Jewish students, we do not know the expansion factor between this longer list and the actual number of Jewish students.

Ranking of the Strategies

Table 1 ranks each of these alternate methods on four criteria: accuracy, cost, the speed with which the objective can be achieved, and intrusiveness for the subject. Rank 1 is the highest recommendation. On some attributes, methods are tied and receive the same ranking. The rankings are based on the subjective judgment of both authors.

Table 1 shows that no method is perfect and that several have advantages in some areas but not in all areas. When available, an existing survey that has asked the necessary information is preferable (for example, if there has been a membership survey of a broader organization or a survey of first-year students for other purposes that also queries religion and/or ethnic identification). For some purposes, counting DJNs is the quickest and easiest source of an estimate (providing that a list of the organization's members exists). A specially designed telephone survey might bring more accurate results, but it is costly and may be time consuming. Organizations need to weigh the purpose of their estimate, the resources available, how quickly an estimate is needed, and whether intrusiveness is a consideration.

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HOW IMPORTANT IS AN ACCURATE POPULATION ESTIMATE?

Regardless of which strategy is used, the estimate of the Jewish student population is likely to be imprecise. The larger question may be whether it is necessary to develop a Jewish population estimate to justify the establishment of a Jewish student organization.

As Segal (2010) suggested, the actual count of the total number of Jewish students is not as important as whether a reasonable number of students attends any particular planned event. A Friday night Sabbath dinner will attract some, speakers will attract others, films still others, and holiday celebrations still others. For those with specific political interests, Israel Peace Week offers an opportunity for participation. Even with competition from other college programs for

Jewish students, such as from Chabad or Koach, Hillel events will attract Jewish students.

Since no strategy provides an accurate count, the question arises as to the importance of knowing that count for certain. Are there a minimum number of students needed to ensure a successful Hillel? Is the Jewish student population the important number, or is it the population of participants? How many is "enough"? National Hillel does not think a minimum number exists, and it is supporting campuses with small Jewish populations, as long as someone—a faculty member, a member of the local Jewish community, or a student—exists to take the initiative and apply to be a "small and mighty" Hillel supported through the Soref initiative (www.smallandmighty.org). Some experienced Listserv members suggest that the best measure of success for a Jewish student organization is whether participation grows and overlaps from event to event, whether events are publicized (e.g., in the university newspaper), and whether participants want to form a lasting organization (Segal, 2010). Rather than "if you build it, they will come," the philosophy may be "if they come, build it."

For networking purposes, Sternberg (2010a; 2010b) suggests contacting any Jewish fraternities or sororities with Jewish "roots" or affiliations to cosponsor a low-threshold social program early in the semester. Networking to Jewish institutions in the area may also involve the community and the local Jewish Federation(s) for multiple purposes, such as bringing interesting speakers to campus or offering students opportunities to participate in community activities with the local Jewish population. Friedman (2010) suggests that it is more important to know that there is a minimum number of students on campus (perhaps 50) who might be interested in Hillel activities than having a more accurate estimate of all Jewish students.

It has been suggested that the rate of participation in Jewish events may vary inversely with the size of the Jewish student body and with the proportion of students at a university who are Jewish (A. Glicksman, 2010). Charmé (2010), however, qualified this expectation by suggesting that students who attend university close to home or commute from home, as is the case at his Rutgers-Camden campus, seem to have less need for Jewish campus affiliation than students who attend university far from home. Only one-third of Rowan University students live on campus, although upper-classmen often live in off-campus apartments away from home. Many, however, live within two hours of home. Thus, estimates of the total Jewish population may misrepresent the number of students who might be interested in on-campus programs for Jewish students.

DISCUSSION

Despite the argument that an estimate of the number of students is not needed, the "if you build it, they will come" concept was not an acceptable argument to the donor, who wanted an estimate before donating.

Thus, at Rowan University, the challenge was to develop an estimate of the number of Jewish students to convince potential funders of the value of developing a Jewish student organization. In this article, we have reviewed seven strategies for developing such an estimate, each imperfect in its own way. We believe that university-administered surveys and telephone surveys have the greatest

likelihood of obtaining a reasonable estimate, but these methods are generally labor intensive and expensive. Snowball sampling, surveying faculty informants, and collecting information about the Jewish population from which most students derive are unlikely to yield sound estimates. Counting the number of students with DJNs seemed to be the best way of developing a "ballpark" estimate at relatively little cost. The overwhelming majority of Listserv participants agreed that the DJN methodology was the most likely to produce a reasonable estimate given the time and budget constraints.

It was thus decided to use the DJN method to estimate the size of the Jewish student body at Rowan University. The first author and the Advancement Director at Rowan University, independently and using somewhat different DJN lists, each counted 146 students with a DJN among the student population. Using an estimate of 12% of Jews with a DJN, we divided 146 by 0.12 (an expansion factor of 8.3) to estimate about 1,200 Jewish students (corresponding to about 12.5% of the student population). Faculty informants (including the first author) had estimated that 5–10% of the student body was Jewish from personal experience. Thus, to be on the safe side and as to not overstate the case to the donor, the estimate was (somewhat subjectively) adjusted downward to about 1,000 Jewish students.

The first author also counted the DJNs at a neighboring state university in the region, but one with a vibrant Jewish studies program (offering a minor in Jewish studies) and an active Jewish Student Union/Hillel. The count was 152—not much different than 146. We were thus able to say to the donor that another area university, with a similar number of DJN students, was able to support a Jewish student organization. Thus, even if the expansion factor of 8.3 is not correct, a campus with 146 DJN students can support a Jewish student organization.

At the present time, a survey of students has been circulated, which asks for religious identification. We hope the response will be adequate enough to help verify (or refute) our original estimate.

The estimates based on the DJN methodology were enough to convince the potential donor to provide funding to help establish a Hillel program, providing there would be an active advisory board comprised of faculty, staff, students, and donors, to which all readily agreed. An additional amount was made available as matching funds (matching what Hillel could raise on its own), thus taking a cautious approach as to whether the investment was worthwhile.

One advantage of obtaining funding before recruiting participants is that a staff member, even if only part-time, may be hired to ensure more professional programming and recruitment efforts. The Reconstructionist Rabbinical College, located not too far from Rowan University, has an internship program, for example, through which rabbinical students may lend their expertise to a college campus (G. Glicksman, 2010). Other institutions in the vicinity of other universities may well do the same.

Some have noted that Hillel is not the only large organization with which Jewish student organizations can affiliate. Whereas Hillel serves more than 500 U.S. college campuses and an estimated 400,000 students, Chabad serves 119 campuses (Nathan-Kazis, 2010) and an estimated 150,000 students. Koach, the College Outreach Project of the Conservative movement, works closely with other Jewish student organizations and Hillel. Does this pluralism diminish

the opportunities for any particular organization to be strong, or does it revitalize the student Jewish community? Sounds like a good topic for a future research project!

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APPENDIX: LISTS OF DISTINCTIVE JEWISH NAMES (DJNS)

Steven Cohen's List of 109 DJNs From 1987 New Haven study:

Abramovitz, Abrams, Abramson, Adler, Altman, Bercovitz, Berkowitz, Berman*, Bernstein, Birnbaum, Blumberg, Blumenthal, Brodsky, Brody, Cahn, Caplan*, Cohen*, Cohn, Eisenberg, Epstein*, Fein, Feinberg, Feingold, Feinstein, Feldman*, Fink, Finkelstein, Freedman*, Friedman*, Ginsberg, Ginsburg, Gold, Goldberg*, Goldfarb, Goldman*, Goldstein*, Gottlieb, Greenbaum, Greenberg*, Gross*, Grossman*, Halperin, Halpern, Halprin, Horowitz, Horwitz, Hurwitz, Hyman, Jacobs*, Jaffe*, Kahn*, Kaplan*, Katz*, Katzman, Kaufman, Klein, Kohn*, Lefkowitz, Levi, Levin*, Levine*, Levinson*, Levitt, Levy*, Lieberman*, Margolin, Margolis, Markowitz, Moscowitz, Rabinowitz, Rappaport, Rosen*, Rosenbaum, Rosenberg*, Rosenblatt, Rosenbloom, Rosenblum, Rosenfeld, Rosenstein, Rosenthal*, Rothman, Rothschild, Rothstein, Ruben, Rubenstein, Rubin*, Schneider, Schulman, Schwartz*, Segal, Shapiro*, Shulman, Siegel*, Silverman*, Silverstein, Solomon, Stein, Steinberg, Stern*, Straus, Strauss, Weinberg, Weiner, Weinstein*, Weintraub, Weiss*, Zeitlin, and Zuckerman

Note: These names were among the most common found on a list of more than 100,000 contributors to the United Jewish Appeal in New York. In New Haven, of 7,090 known Jewish households, 1287 (or 18%) possessed these names (Cohen 1987).

Ira Sheskin's List of 36 DJNs used in his local Jewish community studies:

The names denoted with an asterisk in the Cohen list are used by Sheskin in his local Jewish community studies, plus the name "Goodman": 8% to 12% of Jews have one of these names (Sheskin 1998a).

Ira Sheskin's List of Distinctive Sephardic Jewish names:

The DSNs [Distinctive Sephardic Names] used in a 1997 study of Monmouth County, NJ, are Ades, Adjmi, Anteby, Ashear, Ashkenazi, Betesh, Beyda, Beydah, Braha, Dweck, Dwek, Gammal, Gemal, Mizrahi, Musry, Safdieh, Saka, Serouya, Seruya, Shamah, Sutton, and Tawil (Sheskin 1998b).

Ira Sheskin's List of Russian Jewish first names:

The RJNs (Russian Jewish Names) used in a 2004 study of the Twin Cities are Aleksandr, Basya, Faina, Galina, Inna, Irina, Leonid, Ludmila, Mikhail, Natalia, Natalya, Polina, Svetlana, Vladimir, Yelena, and Yuri (Sheskin 2004).

The Protective Factors for Maintaining Independence©

An Outcome Measurement Tool for Aging Services

Jordan ***Golin*** *and Jeffrey D.* ***Freedman***

Social service agencies are under increasing pressure to demonstrate the value and efficacy of services that they provide to their older adult clients. These agencies are already accustomed to complying with considerable amounts of regulatory requirements and oversight mandates that require them to meticulously document all agency activity while striving to deliver high-quality services with strained and often inadequate budgets. However, these same agencies often lack the information and training on strategies for measuring the impact of their services on their clients in a clear and meaningful way. Such strategies are becoming increasingly important in tracking and authenticating accountability to the governing bodies, funding sources, and, most importantly, the agencies themselves in their pursuit of ensuring the highest quality of care to those in need.

There are several challenges associated with incorporating outcome measurement systems into the general work of social service agencies. First, there is the time and effort needed to educate and train staff on the need for such systems and the implementation of these measurement tools. Second, during a period of economic pressures, administrators may hesitate to commit the funding for such training. Third, agency workers who already have an overflowing plate of responsibilities may resist and resent taking on yet another burdensome task.

Another hurdle is the more fundamental problem of how best to measure the efficacy of services provided to older adult clients. Although even the most effective services will be unable to prevent eventual decline and death, most social service agencies place a high priority on helping clients maintain health and independence and delay physical, cognitive, and emotional deterioration. Although it may seem obvious that the success of a social service agency is in part reflected in its ability to help clients avoid negative events (e.g., hospitalizations, evictions), it becomes more complicated when there is a need to appraise the achievement of this goal. In other words, how can an agency rate its performance of helping someone circumvent a problem? How does an agency accurately measure its success in preventing an unfortunate event?

Prevention and maintenance are at the heart of community-based services for older adults. Experienced service providers recognize and rate the success or failure of their work based on their observations of their clients' appearance (e.g.,

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weight, hygiene), cognitive status (e.g., memory, speech), and general functioning (e.g., judgment, activities of daily living). When clients are not doing well, providers naturally increase the frequency and intensity of services. Conversely, services are kept at a lower intensity or maintenance level when clients are stable and safely engaging in activities of daily living.

This time-honored approach to treatment and evaluation based exclusively on service provider observations is no longer viable in today's funding climate. Due partly to the current tough economic times, clients, families, and funders now expect concrete, measurable results commensurate with the time and effort being invested in services. The previous practice of simply trusting that social workers are using their professional judgment in providing effective care is no longer sufficient. So, the question remains: How can progress be quantified and documented when maintenance and prevention are the desired outcomes?

ONE AGENCY'S STRUGGLES WITH OUTCOME MEASUREMENT

Jewish Family & Children's Service of Pittsburgh (JF&CS), a multifaceted nonprofit social service agency, was struggling with the challenge of measuring the outcomes of the clients in its Older Adults Services division. For decades, the geriatric care managers (all masters-level clinical social workers) have been monitoring, assessing, and intervening with older adults. Currently these professionals average nearly 20 years of experience working with the elder population of Pittsburgh. They are supervised by a clinical psychologist and have weekly consultations with a geriatric psychiatrist. JF&CS also provides other services to assist older adults in remaining independent, including in-home caregiver services, cognitive enhancement training, and supplemental food programs.

With the changes in expectations regarding measurable outcomes, JF&CS struggled to demonstrate the true value and real impact of these services. The outcome measures that had been used were primitive and more reflective of outputs (i.e., number of units of service provided) than of actual outcomes (i.e., improvements in functioning or well- being). As such, there was a struggle to show existing and potential funders evidence of the merits of JF&CS's services to its older adult clients.

The previous practice of simply trusting that social workers are using their professional judgment in providing effective care is no longer sufficient.

The staff reviewed a number of outcome measurement tools used across North America and found that the task of identifying a measurement tool that would be relevant and user-friendly to a social service agency was more problematic than initially thought. Some tools were overly narrow, some were overly lengthy, and some seemed geared toward researchers working in laboratory conditions. Still, it seemed clear that a complex tool was required. As geriatric care managers and clinicians, the professional staff routinely helps clients in a wide range of areas: They assist with financial management challenges, advocate within the health care system, discover solutions for legal difficulties, explore in-home care options, communicate with family members, and provide emotional support. Measuring and quantifying the success of these many and varied activities in a concise manner proved to be daunting.

Several different approaches to measuring outcomes were considered. One involved incorporating several separate standardized tools that measure discrete areas of functioning. The second involved adopting a preexisting, broad-based measurement system that covers all of the areas relevant to the agency's interventions

with this population. The third involved developing a new measurement system. We next review each of these three approaches.

Incorporating Several Standardized Tools

For the first approach, the agency considered identifying and assembling a battery of tests that could be uniformly administered to all clients on an ongoing basis. For example, one tool would measure social isolation, another tool would assess activities of daily living, and a third would evaluate cognitive functioning. Including a range of areas was considered critical because most of the care management clients have a myriad of needs. The JF&CS staff had already been using a number of well-tested and highly regarded inventories and questionnaires that measure discrete areas of functioning. For example, the social workers regularly used the Geriatric Depression Scale (Yesavage et al., 1982) to evaluate symptoms of depression and the Folstein Mini Mental Status Exam (Folstein, Folstein, & McHugh, 1975) to screen for deficits in cognitive functioning. The agency was able to identify additional tools that effectively measure progress or decline in the many different areas of functioning addressed by the social workers, including the Perceived Well-Being Scale (Reker & Wong, 1984), the Lubben Social Network Scale (Lubben, 1988), and the Personal Mastery Scale (Pearlin & Schooler, 1978).

To evaluate the success or failure of the services being delivered, staff would need to track changes in test scores over time. Because services are typically provided over extended periods (sometimes years), the social workers would be required to administer each of these tests to each of their clients on multiple occasions. In addition, although many of these tools were designed to be brief in their administration (i.e., less than five minutes), incorporating the entire set of tools would necessitate a session lasting more than one hour. The agency staff imagined an elder client's reaction to being regularly burdened with a time-consuming and exhausting session of testing with a dozen different evaluative tools. These imagined sessions seemed counter to the desire to alleviate burdens and distress. Additionally, concerns were expressed about the time this testing would take away from the delivery of services.

Adopting a Preexisting, Broad-Based Measurement System

The second approach that was considered was to use a broad-based geriatric assessment tool. Such tools evaluate functioning across a wide range of domains and provide a detailed picture of the older adult. Examples include the Older American's Resources and Services – OARS (Laurie, 1978), the PGC-Multilevel Assessment Instruments (Lawton et al., 1982), and the Iowa Self-Assessment Inventory (Morris & Buckwalter, 1988).

These tests are strongly supported by the professional literature and yield a great deal of important data. However, they are also lengthy and time consuming. The OARS, for example, requires at least 45 minutes of face-to-face time for each administration. Moreover, these tools seemed better suited to a thorough initial evaluation of a client than for engaging in a routine assessment of client functioning.

Having struck out twice and before swinging again, the clinical team all met as a group and asked the basic question, "What are we aiming to accomplish with our clients?" Rather than relying on standard assumptions of what clients needed, the staff considered three sources of information to answer this question. The first source

was those areas of concern identified by client, families, and staff that had then been collaboratively restated as treatment goals. The second source was social worker observations and client feedback that had been used to track progress toward treatment goals. The third source was the body of professional research that focused on the wide range of existing programs and interventions designed to maintain the well-being of older adults. It was hoped that, by identifying the variables that were most commonly used as indicators for successful treatment of older adults, consensus would develop around clear and measurable outcomes. These outcomes could then serve as the basis for items in an effective outcome measurement tool.

The Importance of Nursing Home Risk Factors

The most frequently cited and accepted outcome for work with older adults is delaying nursing home admissions. Long-term placement in a skilled nursing facility represents, for many, a sharp decline in independent functioning and consequently the withdrawal from participation in the larger community. A nursing home admission is a clear line separating independent well-being from compromised health and dependent living. As such, community-based services for older adults make strong efforts to avoid such placements and often consider the placement of a client in a long-term skilled nursing facility as the end of their work.

With the clear line of skilled nursing facility (SNF) admission as a guidepost, the next step was to research and identify the many factors that lead a person toward this life-changing demarcation. It was hoped that tracking these factors would be useful for the dual purposes of monitoring an older adult client's progress or decline and of measuring a social worker's effectiveness.

JF&CS staff spent time identifying scientific studies that focused on a large variety of client characteristics, attributes, and behaviors found to be strongly correlated with increased risk for SNF admission. From this review of the literature, a list was compiled of frequently cited risk factors, such as cognitive impairment (Gaugler et al., 2009), living alone (Kersting, 2001), deficits in activities of daily living (Elgar et al., 2002), and depression (Harris et al., 2006). These factors were congruent with the challenges being addressed by the social workers. For instance, the geriatric care managers often help clients obtain in-home caregiver services, establish psychiatric treatment, and secure more safe and elder-friendly living quarters. The parallel between the research and the work goals with clients was a compelling argument to use these risk factors as part of the evolving measurement tool.

The Development of a Home-Grown Tool

It was believed that this list of risk factors was a step in the right direction. However, to use this list as a measurement tool, it was necessary to clearly delineate the meaning of these factors. Because the many research articles from which the list was generated used similar terminology but with differing descriptions and definitions, there was some uncertainty and ambiguity surrounding the factors' meaning. For example, studies used different definitions and tools to measure cognitive impairment, social isolation, and physical activity. To move closer toward clarity, some of the factors, such as caregiver well-being, were divided into more discrete components. This step helped generate a more precise understanding of the variables and led to the development of a more reliable system of scoring.

It was also decided that each factor must satisfy at least two criteria: (1) It must be specifically defined so that there would be a greater likelihood of consensus on its identification and its rating (i.e., high interrater reliability), and (2) it must be a condition, circumstance, or area of functioning that could be altered or influenced by the collaborative efforts of the geriatric care managers. It was decided that three factors that were highly correlated with nursing home admissions but did not meet the second criteria (age, income, and living with someone) would be included in the tool so that they could be considered when working with clients, but would be excluded from formal analyses.

Although the list was initially conceptualized as "risk factors" for SNF admission, it was strongly argued that the new system should be based on a model of well-being and encouragement of independence, rather than on a medically oriented model of pathology. As a result, the tool was named the Protective Factors for Maintaining Independence © (PFMI). The "protective factor" nomenclature better reflects the strength-based approach to treatment whose efforts promote clients' health and ameliorate areas of relative weakness. From the extensive review of the professional literature and the social workers' real-life experiences working with this population, and with the "protective factor" perspective in mind, 20 factors were identified for inclusion in the tool.

PROTECTIVE FACTORS FOR MAINTAINING INDEPENDENCE ©

The 20 factors, including those marked with an asterisk that are excluded from formal analyses, are shown in Table 1.

Scoring the PFMI ©

The "protective factor" nomenclature better reflects the strength-based approach to treatment.

The next step of this process involved developing a simple, efficient, and reliable way of measuring and scoring the 20 identified factors. Traditionally, inventories such as the PFMI are developed by academic institutions that follow a rigorous protocol of conducting numerous small studies to refine and validate the tool. In such a process, each factor is carefully studied in detail to verify its utility (i.e., testing for construct, content, and criterion validity) and the reliability of the scoring system (i.e., interrater, test-retest, intermethod, and internal reliability). Given that the agency is a small nonprofit social service agency limited in staff and financial resources, a less formal but effective process was pursued, as described next.

A simple four-point scoring system was adopted as a first step toward addressing construct validity and reliability through ensuring clarity and consensus among the social workers in scoring each factor. Additionally, it was believed that rating a person's functioning on a four-point scale could be done quickly. The lowest score on the scale was assigned a value of "0," indicating the

Table 1.
Factors Included in the PFMI Tool

Age*	Safe environment
Income*	Appropriate housing
Living with someone*	Financial stability
ADL/IADL mastery	Maintains personal safety
Social involvement	Exercise and physical activity
Medical coverage	Sense of purpose, meaning in life
Medication compliance	Sense of control
Cognitive intactness	Caregiver well-being: Health
Emotional stability	Caregiver well-being: Physical stamina
Adequate nutrition	Caregiver well-being: Financial security

lowest and least desirable level of a factor. A "1" indicated a need for a large degree of improvement, a "2" indicated a need for some improvement, whereas the highest score, a "3" indicated the highest and most desirable level of a factor in which no improvement was deemed necessary.

For a concrete example of the four-point scoring system in use, consider one of the 20 factors in the list: activities of daily living (ADLs), which also encompass instrumental activities of daily living (IADLs). ADLs refer to the basic activities we all do daily, including hygiene (bathing and grooming), continence, dressing, eating, toileting (ability to use a restroom), and transferring (getting in and out of bed or moving from a sitting to standing position). IADLs are more complex activities and include but are not limited to shopping, preparing meals, driving, managing finances, and managing medication. To score a "0" on the rating system, the person would present with more than one ADL deficit, such as an inability to independently dress or feed oneself. A score of "1" would indicate that the person has one ADL deficit, such as an inability to bathe independently. A "2" indicates that the person has been identified with an IADL deficit, such as managing his or her finances but no ADL deficits. A "3" is indicative of no ADL or IADL deficits.

Much like in the staff meetings to develop a detailed and consensual definition of each factor, the development of the scoring guidelines emerged from democratic, round-table discussions. These discussions addressed issues associated with both the instrument's validity and reliability. Participants included not only the geriatric care managers but also the entire Older Adults Services staff so that the instrument would have applicability to a broad range of services and not exclusively to care management.

Following an initial agreement on the rating guidelines for each factor, care managers and other staff reviewed the records of their clients and scored each of them based on the rating criteria. With these scores in hand, the staff then reconvened to discuss the rationale for each of these scores and further developed consensus on the scoring criteria. Differences of opinion among the staff in regard to scoring were carefully examined and discussed. Rating criteria for each factor continued to be modified until there was strong agreement among the staff. Finally, a form was created listing the revised criteria, and staff began using this new instrument over a trial period of several months.

During this trial period the feedback was overwhelmingly positive. The staff reported that the easy-to-use measurement tool accurately reflected the progress of their clients, was consistent with their own observational findings, and, as such, was a valid instrument. Occasional questions about scoring were brought back to the entire team, and minor tweaking helped make the tool clearer and more consistent across the clinicians, thus addressing interrater reliability.

Expanding the Use of the PFMI © to Other Agencies

During this development process, colleagues from partner agencies in a multiagency association known as AgeWell Pittsburgh expressed an interest in adopting the new protective factors tool. AgeWell Pittsburgh is a collaborative network comprised of JF&CS, the Jewish Association of Aging (JAA), and the Jewish Community Center (JCC) with the goal of helping older adults live as independently as possible in the community for as long as possible. The JAA and JCC were also struggling with the challenge of measuring outcomes in their work with older adults, much of which

substantially differed from the type of work provided at JF&CS. For example, the JCC provides mostly social-recreational and wellness services (e.g., fitness programs, educational classes), and the JAA provides more medical-oriented services (e.g., outpatient rehabilitation, home health services). Between the three agencies, more than 6,000 older adults in Allegheny County were receiving a wide range of supportive, community-based services, fitness and exercise programs, adult day services, Meals on Wheels, and in-home caregiver services.

With support from the United Way of Allegheny County and the Jewish Federation of Greater Pittsburgh, an outcomes study protocol was established for each of the three AgeWell Pittsburgh partners to use the PFMI. However, the instrument needed to be modified to meet the needs of the different agencies. First, it was decided that all of the agencies would begin using the PFMI for all of their aging services. Some of the programs were more accustomed than others to measuring outcomes so efforts at promoting staff education and culture shifts were needed. Second, the scoring criteria needed to be modified to accommodate the additional programs that were to begin using the tool. The criteria that had previously been agreed on were based on the care management context and did not always lend themselves to data gleaned from other types of staff–client interactions. Third, not every factor was relevant to every service being offered, and all staff members did not possess the professional expertise needed to assess every factor. For example, a fitness instructor might not be able to assess the presence of cognitive impairment. Therefore, it was decided that each AgeWell Pittsburgh service would use either a subset of the PFMI or the entire instrument, as determined by (1) the client concerns being addressed by the particular service and (2) the ability of the service provider to measure the presence or absence of the factor. Fourth, the frequency of administration was reconsidered. Whereas the care managers assessed their clients every 3 months, this timetable did not fit AgeWell Pittsburgh services that were short term in nature or were of lower service intensity. It was decided that the frequency of administration would vary from service to service, based on the nature of the intervention provided. Services that provide intensive interventions to high-risk clients (e.g., in-home caregiver services) would administer the instrument every 3 months, whereas services that provide less intensive interventions to healthier clients (e.g., exercise programs) would administer the instrument every 6–12 months.

Over time, the PFMI became an integrated part of the outcome measurement system used by all AgeWell Pittsburgh services. The AgeWell Pittsburgh agencies could now use the PFMI scores not only to monitor each client on specific areas of functioning but also could aggregate data across clients to provide an overall view of the results of agency efforts.

Modifying the instrument, training staff on its use, and implementing it on a consistent basis were more challenging for some programs than for others. As is often the case with modifications to work routines and protocol, the initial phase required close monitoring and frequent staff training to ensure the consistent and uniform use of the instrument. This process was easiest for those staff who recognized that the tool was not merely a "paperwork requirement" but that it could assist them in their work by providing an objective outcome measure that would accurately reflect their efforts. The rollout of the instrument was also easier for those staff in programs that already demanded ongoing documentation.

Finally, developing and implementing a system for capturing and recording the data created additional challenges, given that the availability of funding for this project was limited and technology resources in each of the three agencies differed considerably. Consequently, some staff members used simple spreadsheets to record their data, whereas others used more sophisticated information management software. Not surprisingly, these differences complicated the task of aggregating data and running reports.

Current Status of the PFMI ©

AgeWell Pittsburgh has now been using the PFMI for more than two years and has screened over 4,000 clients. Each of the AgeWell Pittsburgh services from the three partner agencies (16 services in total) either use a subset of the PFMI or the entire instrument to track changes in client functioning and as an outcome measure. Data are recorded in a shared information management system, and reports can be generated by program, by agency, and for all of AgeWell Pittsburgh.

Using the PFMI with a particular client is straightforward. Some of the programs use a one-page self-assessment version, other programs interview their clients, and still others base the scores on observations of their clients. In no case does the gathering of data require more than 20 minutes of the client's time. Following the scoring protocol, a staff person assigns scores to each of the factors and reassesses the client at a predetermined interval. Throughout the service delivery process, efforts are made to boost those protective factors that are likely to maximize independence. The staff person has easy access to the scores via his or her computer, monitors changes, and can alter the interventions provided or refer the client for additional services when necessary. Progress (or decline) can be shared with the client and/or family, and concerns can be framed in the context of the protective factors.

Although the tool was designed to be relatively easy to administer, analyzing the results proved to be more difficult, at least initially. Any one of the 20 scores can go up, down, or remain unchanged from one administration of the PFMI to the next. Since scores are being tracked for up to 20 protective factors, it was a struggle to determine the best way to summarize the data. This became even more challenging when attempting to examine data across multiple administrations for a particular client and still more complicated when attempts were made to aggregate data across multiple clients and programs. The staff felt that it was critically important to overcome these difficulties so as to get the most from the data and thus determine the effects of the interventions. Ultimately, the solution to these challenges required the purchase of a new data management system that was able to manage more complex data analyses. The PFMI scores, as well as other events that are of great interest (e.g., hospitalizations, ER visits) are now entered into this system. Currently, this solution is successfully providing the reports needed to monitor clients, adjust the interventions, and assess the achievements. Standard reports and ad hoc queries on the client and aggregate levels can now be easily run in response to staff requests and funder requirements.

Strengths of the PFMI ©

The PFMI has allowed each of the AgeWell Pittsburgh services to measure the impact of its interventions in strengthening those protective factors that are

known to minimize the likelihood of being admitted to a nursing home. The factors assessed by the PFMI are directly related to the kinds of interventions provided by each of the AgeWell Pittsburgh services. The tool is structured so that the data from the full range of services provided by AgeWell Pittsburgh can be aggregated in a single database. At the same time, the tool is flexible enough to allow each service to assess only those factors that are relevant to its interventions. This flexibility also allows each service to conduct assessments according to a time schedule that is appropriate for that service. The costs and labor involved in maintaining the database are shared among the AgeWell Pittsburgh partners, and the use of a common instrument has allowed for the development of a shared language when discussing the status of AgeWell Pittsburgh clients.

The agency has successfully analyzed two year's worth of data and has reported back to funders about the instrumental progress made in helping the clients sustain their independence in the community. It is now possible to easily generate data on the frequency of hospitalizations and emergency room visits, nursing home admissions, changes in functioning (i.e., changes in PFMI scores), and referrals made to clients by AgeWell Pittsburgh staff.

AgeWell Pittsburgh and its advisors continue to discuss new ways of using this system and to explore additional enhancements to its implementation. The hope is that it will become possible to identify and assist more older adults in the community who continue to miss out on services that could help improve their quality of life and enhance their ability to live independently.

Limitations of the PFMI ©

The PFMI was developed primarily as an outcome instrument, and its format and administration protocols reflect this purpose. It has not been validated using existing standardized measures. Therefore, the instrument has not yet proven itself to be a scientifically valid means of measuring the risk factors for nursing home admissions. It is hoped that such studies will be forthcoming.

Although staff have grown more comfortable using the PFMI to measure the status of their clients, they have also expressed a desire to expand its use in various ways. For example, very few of the protective factors on the PFMI are assessed by all of the AgeWell Pittsburgh services. This means that staff are only identifying risk factors that are assessed by their "version" of the PFMI and are therefore unaware if their clients are deficient in other protective factors. For example, a Meals on Wheels recipient may have mental health challenges that could be ameliorated by participation in AgeWell Pittsburgh's psychotherapy service. However, this individual would not be identified as such, because the Meals on Wheels program does not assess its recipients' mental health. Such a concern could be addressed by enabling the PFMI to screen all protective factors across all service recipients.

There have also been challenges in using this tool across such a wide range of service providers. The use of a single instrument across multiple services and several agencies requires constant monitoring and collaborative conversations. Because the data are aggregated across all services, problems with any single provider can have a ripple effect that could contaminate the data for the entire system. It is incumbent on all providers, therefore, to communicate with one another regarding questions, concerns, or challenges in using the PFMI. This effort is complicated by staff turnover, the initiation of new AgeWell Pittsburgh services, and the unfortunate

phenomenon of staff being required to take on additional responsibilities that may tempt them to become less conscientious in their use of the PFMI.

SUMMARY

The development of the PFMI is a significant accomplishment underscoring the collaborative efforts of social service agencies endeavoring to demonstrate the impact of their services for older adult clients. In response to a changing funding climate and an increased focus on accountability in the field, their efforts have yielded an instrument that offers a clear picture of program participants' functioning and greater evidence of the value of community-based services that work to bolster and sustain independent community living for the older adult population.

The process of building an outcome instrument, though challenging and time consuming, has been an invaluable experience. It compelled the social service agencies to clarify the purpose of their services and to grapple with the challenges of identifying meaningful, measurable outcomes. This, in turn, has encouraged the agencies and the general community to give focus and genuine commitment to elder care services. It is hoped that this instrument will also help maintain a high priority to elder care programs during times of economic challenge. The systems that AgeWell Pittsburgh has developed will of course continue to evolve. There will be continued efforts toward developing more effective means of connecting older adults with supportive community-based services for the health and well-being of older adults and for the betterment of the entire community.

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The process ...compelled the social service agencies to clarify the purpose of their services and to grapple with the challenges of identifying meaningful, measurable outcomes.

"AAA" Guide to Developing and Using Knowledge to Drive Jewish Communal Policy

*Leonard **Saxe** and Fern **Chertok***

The ability of Jewish communal organizations to adapt successfully to the ever-changing landscape of Jewish life rests, in part, on their capacity to develop and use knowledge. Just as major societal institutions in the fields of economics, education, health care, and social welfare are increasingly knowledge-driven, so too must the organizations that serve the Jewish community develop and institutionalize strategies for generating and using knowledge effectively. Jewish communal decision making needs to be evidence-based, but in ways that are congruent with Jewish values. In other words, to be knowledge-driven in a Jewish context is not simply to use data but also to seek both the surface and the more nuanced meaning from information and, perhaps even more importantly, to collaborate in its development and interpretation.

At the 1947 national conference of the Jewish Communal Service Association of North America, Kurt Lewin, a Jewish émigré from Germany and the leading social psychologist of his era (Saxe, 2010), urged the field of Jewish education to "instigate a serious program of action-research" (p. 296). Lewin was calling for cooperation between practitioners and social scientists in using rigorous research design, broad data collection, and critical synthesis in the service of developing not only evidence-based best practices but also a better understanding of the process and context of Jewish education more broadly (Lewin, 1946). In the ensuing years the fields of secular education, public health, and medicine were transformed by this type of research program. By contrast, decision making about Jewish communal policy continues to be characterized by a process in which intuition and anecdotes are all too often privileged over systematic, high-quality information; Lewin's concern that the Jewish community would be "the last to avail itself of this vehicle [research]" has unfortunately proved prophetic.

It is not that Jewish organizations have totally ignored the uses of data. To the contrary, a plethora of evaluation studies have been conducted to assess whether specific programs yield desired outcomes. Evaluation studies clearly have importance for local decision making and practice, and they also have the potential to provide useful insights to the larger community. Unfortunately, many if not most of these studies are never disseminated, and even when they are made public, the generalizability of their findings is limited by the specificity of the context, program, and individuals studied. Substantial resources have also been

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invested in socio-demographic studies that provide estimates of the number of Jews and describe the characteristics of American Jewry (see Saxe & Tighe, in press). But socio-demographic studies are exceedingly difficult and expensive to conduct, and although they tell us about what is, they provide little information about why or what could be.

Perhaps the most problematic aspect of the current situation is the limited use of research to answer the most fundamental and broadest questions facing the Jewish community. For example, how does Jewish identity relate to other aspects of the individual's sense of self, change over the lifespan, and manifest in behavior, organizational affiliation, and communal participation? What is needed is a commitment to developing a reservoir of knowledge that can serve as the foundation for policy development and assessment.

The limited role of research and knowledge cultivation in Jewish communal policy making is the result of a host of factors, but it is also an understandable although problematic human reaction to the complexity of the issues at hand (see Kahneman, Lovallo, & Sibony, 2011). As much as we seek to be rational beings, we are also wired to have cognitive biases that simplify our perceptions. Thus, for example, confirmation bias leads us to discount data that run contrary to our understanding of a situation, status quo bias causes a preference for the current state, and anchoring bias results in overweighting of certain pieces of information or cases even when unrepresentative of the overall situation (Kahneman, Knetsch & Thaler, 1991; Kahneman, Lovallo, & Sibony, 2011; Samuelson & Zeckhauser, 1988). For example, the finding from the 1990 National Jewish Population Survey (Kosmin et al., 1991) of a 52% intermarriage rate became the focus of intense communal discussion. Findings about differences in Jewish involvement between intermarried and in-married households reaffirmed the communal narrative that intermarriage was the primary cause of disengagement with Jewish life. However, this narrow perspective ignored the critical role of important socializing experiences such as Jewish education, Jewish peer networks, and exposure to home ritual in determining adult Jewish engagement (Chertok, Phillips & Saxe, 2008).

Perhaps the most problematic aspect of the current situation is the limited use of research to answer the most fundamental and broadest questions facing the Jewish community.

In the Jewish community, where communal engagement is an important value, we are also very social in how we make judgments. "Crowd sourcing" is a new term, but it describes the way in which many Jewish organizations traditionally function. The term refers to the informal gathering of information and the assumption that many voices can produce better judgments than a few (Surowiecki, 2004). Although crowd sourcing has been used successfully in gathering and analyzing data in the natural sciences (e.g., the Citizen Scientists program of the Adler Planetarium), the "wisdom of crowds" is predicated on access to very large numbers of informants. By contrast, most Jewish communal policy makers, especially on the local level, have access to only small circles of informants.

Jewish communal decision makers, like those in many other fields, are also prone to reactive policy making in response to crises or perceived threats to continuity—situations that inhibit the use of evidence-based practice (Jack et al., 2010). For example, the finding, cited earlier from the 1990 National Jewish Population Survey (Kosmin et al., 1991) indicating that 52% of current marriages among American Jewish were to non-Jews, led to the rapid development of several streams of intervention based on commonly held opinions among

communal leaders but also on a limited and, in some important respects, misleading understanding of the situation.

The Jewish community is too large, diverse, and complex—and the questions it faces are too important—not to adapt the techniques of cutting-edge fields and use state-of-the art paradigms for knowledge creation and utilization. Well-conceived, conducted, and analyzed research is an antidote to our individual cognitive biases and the limitations of crowd sourcing. It helps ensure that we understand the texture and nuance of the issues we face. In this article we outline a process for moving the Jewish community toward a rigorous evidence-based approach to communal planning and practice. We explore how the systematic development of questions, design of data collection, and analysis coupled with synthesis can guard against allowing our predilections to become our predictions.

THE THREE A'S OF KNOWLEDGE CREATION AND USE

Becoming a knowledge-driven community that embeds research—conceived of broadly as knowledge development—into policy making requires more than a commitment to collecting and using data: It is a process. In this section, we describe a three-step process: *A*sking (the right) questions, *A*nswering questions (well), and *A*malgamating and disseminating findings. As a shorthand, we refer to these as the three "A's" of knowledge creation and use. We understand that reducing this process to three steps is a rhetorical simplification. Each step includes numerous tasks, and the process is not necessarily linear. A dynamic process of knowledge creation and use will go back and forth between idea development, design, and analysis/synthesis.

Asking (the Right) Questions

One of the hallmarks of a systematic approach to the development and use of knowledge is to animate the process by formulating a rich set of questions. At the broadest level, the questions are about our "theory of the problem" (Gottfredson, 1984). What is the nature of the problem, why does it exist, what are its origins, and what would the situation be like if this problem were not present? More narrowly, the questions are about the rationale and outcomes of specific policies or programs. Although it might be easier to shape questions around the data at hand, what is often needed is information that is not already part of our communal or organizational repertoire and experience.

As noted earlier, socio-demographic studies consume a large portion of communal research resources. Their focus has been on the size of the population, its characteristics, and the level of engagement. Implicit has been the question of whether the population is growing or shrinking and whether certain characteristics (e.g., intermarriage) are increasing or decreasing. However, the most important questions facing the Jewish community may not be about population size, but instead relate to the nature of Jewish engagement. For example, if one is interested in increasing the penetration of day schools, it may be less important that a community has 10,000 or 11,000 children and more critical that we understand the barriers that keep the vast majority of parents from choosing day school enrollment for their children.

It should be clear that the process of question generation and setting the research agenda cannot be accomplished singlehandedly by the researchers or

individuals specifically tasked to develop knowledge. Identifying and refining researchable questions requires the explicit and ongoing input of policy makers and practitioners. Studies on utilization of research in fields as diverse as agriculture, education, and medical care demonstrate that early and ongoing involvement of decision makers is the best predictor of research use (Dobbins et al., 2002; Jack et al., 2010). Policy makers are most likely to simply ignore research findings when they seem out of step with perceived policy needs (Blewden, Carroll, & Witten, 2010).

In many ways the proposed system begins and ends with bringing to the forefront and building consensus around the major questions to be researched. One of the critical components of the system for knowledge generation that we are proposing is to institutionalize the surfacing of key areas of knowledge need into communal policy making. This might be accomplished by using communal forums such as the General Assembly to hold "hearings" on what questions are most pressing or by tasking topic-based work groups, composed of researchers and practitioners, to do the same.

Answering Questions (Well)

Maimonides (1904), in the *Guide for the Perplexed*, famously wrote, "Truth does not become more true by virtue of the fact that the entire world agrees with it, nor less so even if the whole world disagrees with it." In part, the rationale for conducting systematic research is to guard against assuming that the most popular policy is the most effective one, and vice versa. From the Maimonidean perspective, science is the "knowledge of ultimate and proximate causes, which one must investigate to know anything" (Kravitz & Olitzky, 1999, p. 18). Investigating questions about Jewish communal policy is a search for causes and, necessarily, involves using multiple sources of information considered from multiple perspectives.

In this search for answers, it is important to note that the quality of information is more important than the quantity. A study of the experience of a few hundred individuals carefully sampled and explored in depth may be more valuable than research that gathers brief and surface information from thousands. How one goes about answering questions—in other words, how they are operationalized in research design choices—is critical. Although sometimes issues of research design are seen as the concern only of academicians and as immaterial to the use of data, in fact, how one conducts the search for answers is as important as the questions themselves and determines the purposes for which results of any study can be used. Several considerations apply to developing data that can be used for policy and program development.

1. *What is the reason for the effects we observe?* Based on the design of the study, can we infer the cause or do the findings merely suggest that there is a relationship between the outcomes? For example, the impact of Jewish education has typically been studied by nonexperimental research designs, where we look at the same people over time. But these designs do not allow one to assess the effect of selection (differences between families that choose to send their children for different amounts of, or no, Jewish education). If the questions are truly about causal mechanisms—and they often are because we want to determine if investing in a particular type of program yields results—we need more than descriptive

research. We need comparative research that allows us to estimate how participants might have changed had there been no program (Morgan & Winship, 2007) and to compare how these changes play out over time.

2. ***What is the active ingredient?*** If we find effects, can we tell what program factors are responsible for this impact? If a study of Israel experience programs indicates that participants have stronger Jewish identities and are more likely to be engaged with Israel afterward, what is the key ingredient that led to this change? Is the change due to having an immersive experience with Jewish peers, is it about the educational content, or is it the result of the unique experience of Israel? Without developing an understanding of the "theory" of a program, we are left with "black box" interventions, a term borrowed from engineering to describe a type of program model in which we know the inputs entering the system and how they are expected to look after exiting, but the processes by which inputs are transformed into outputs is metaphorically hidden from view within the opaque box (Bateson, 1972). Understanding the theory of a program is one of the most difficult tasks of research, but it also has the greatest potential to improve programs and policy.

3. ***To whom do the results of the study apply?*** Research is always a "snapshot" of a specific group at a particular time. A key research issue is our ability to generalize beyond the individuals or groups that are studied. Thus, for example, one might want to learn about what motivates young donors to give to Jewish or non-Jewish causes. Depending on when the research is done—for instance, a period of economic prosperity versus a period of economic instability—the results may differ. Motivation for Jewish philanthropy may be different for wealthy than for less wealthy donors, and particularly among young leaders, their age, stage in career, and family status may interact with their giving patterns. No program of research is completely comprehensive, but understanding the limits of generalizability of each study tells us how complete our understanding of the issue is.

Understanding the theory of a program is one of the most difficult tasks of research, but it also has the greatest potential to improve programs and policy.

Answering questions well—understanding causal factors, their applicability, and their meaning—is critical to building a body of knowledge about policy issues. Doing so can be technically complex and thus often requires specific research expertise. But the process also requires collaboration between researchers and policy makers to assure that the knowledge is useful and applicable. Research cannot be conducted in a policy vacuum, just as policy making should be built on a foundation of research-generated knowledge.

Amalgamating and Disseminating Findings

Asking the right questions and answering them well are necessary conditions for developing a knowledge-driven method of policy and program development, but they are not sufficient to make the process effective. Research has to be synthesized for it to be effective as a tool for improving practice. In health care and education settings increasingly, evidence-based practice has advanced by combining the results across small studies to broaden the diversity of participants and interventions. One example in the Jewish communal arena is our effort to develop more precise estimates of the size of the U.S. Jewish population (Saxe & Tighe, in press; Tighe et al., 2011). Most studies of U.S. residents are too small to capture the approximately 2% of the population that identifies as Jewish by

religion. By combining data from multiple studies one can obtain a more precise estimate.

There is another element in the amalgamation process, which requires review and assessment of findings as they relate to policy. At a basic level, it requires systematic reviews of available knowledge. But it can also mean assembling what have been called "consensus panels," which are groups of experts gathered to assess the available evidence on a particular problem. Consensus panels have rarely been used in the Jewish communal world, but are a hallmark of the development of health and educational policy. Passage of the *No Child Left Behind Act of 2001* was groundbreaking for American educational policy in part because it required the use of scientifically based instructional methods. In the area of reading, the challenge of discerning what methods were sufficiently evidence-based was aided by the work of the National Reading Panel (NRP), constituted in 1997 to assess research-based knowledge of methods of teaching children to read. Consensus panels, such as the NRP, are charged with the dual task of evaluating and synthesizing findings from multiple research sources.

The first role of consensus panels is to vet individual studies to determine the extent to which their design and analysis use systematic empirical methods, comport with standards of validity and reliability, and justify their stated conclusions. If all studies, regardless of scope and relative claims to validity, are given equal valence in crafting the messages to be gleaned from the research, then there is no form of quality control (Weiss, 1979). In other words, what credence should be given to the results of each study? In the academic arena, this role is carried out by independent, peer-reviewed journals, and publication is seen as the imprimatur of the field. Unfortunately, research related to Jewish communal decision making is typically published without peer review, and even when published in scientific journals, the lag time is often out of sync with policy needs.

Syntheses and review panels can also highlight and focus communal attention on the themes that emerge across studies so that appropriate policy and programs can be developed. Too often, the hope is that a new study will provide definitive answers, and funders often want a study conducted in their particular setting. However, "big bang" studies that fully capture the phenomenon of interest and completely discount competing hypotheses are rare. It is far more typical for research knowledge to progress through a "reservoir" model in which the results of a number of studies accrete over time to form a more complete picture (Gold, 2009). One wonders if the development of successful communal initiatives, such as Taglit-Birthright Israel, might be accelerated by learning across studies through the synthesizing function of consensus panels.

The goal of the accumulation and assessment process is to develop usable knowledge. That requires a clear strategy for dissemination. Explicit attention needs to be paid to strategies for fostering the penetration of research findings into the policy-making and practice communities. Other fields of action research, most notably agriculture, make use of boundary organizations and roles such as the extension worker who act as intermediaries between science and end-users (Cash, 2001). Boundary-spanning organizations or figures serve as translators between research teams and the policy makers, forging two-way communication (Gold, 2009; Inkpen & Tsang, 2005). In a circular path of influence, boundary organizations also allow end-users to give input into the topics to be researched.

CONCLUSIONS

Brandeis once said that "the logic of words should yield to the logic of realities." This special issue of the *Journal of Jewish Communal Service* is filled with intriguing and potentially important ideas for transforming the communal landscape. But it is unlikely that all of them will be successful in practice, regardless of the power of the case made for them or how fervently they are promoted. The meta-idea proposed here is to develop a systematic approach to decision making about these ideas that is based on their scientifically demonstrated efficacy. We can make a strong data-based case for this innovation based on the experience of policy fields as diverse as education, medicine, and agriculture. Just as evidence-based practice has become the norm in the field of medicine, so too should it become normative in the Jewish communal world. We can launch this idea by scheduling forums at the next General Assembly to develop consensus about which areas of knowledge development are most pressing. This would be followed up with the establishment of task force groups for the top priority areas of knowledge development. These groups would then be tasked with further articulation of the research questions that need to be answered and critical review and synthesis of the existing research in their topic area.

Will an emphasis on evidence and rigorous methodological testing stifle creativity and innovation? In fact, we believe it will have just the opposite effect. A focus on question-asking should simulate creative thinking, and testing, particularly if it is directed to the development of demonstration projects, ensures that creative ideas will receive a platform on which they can be evaluated. Too often, creative impulses are stifled because we cannot be assured that they will be successful. Adopting an experimental research attitude will allow them to be tried. In the same way, an emphasis on aggregation will ensure that we learn from the experiments we conduct. There is perhaps more to be learned from our failures than our successes, but only if we assess them well and consider them in comparison to alternative approaches.

Just as evidence-based practice has become the norm in the field of medicine, so too should it become normative in the Jewish communal world.

Wisdom is a Jewish value, and a search for truth is one of our central tasks. However, wisdom and knowledge alone will not enhance the effectiveness of Jewish communal organizations nor singlehandedly improve programs and policy. Knowledge is but one ingredient in the mix of social and political forces that affect Jewish communal and organizational success. Our three "A's" to creating a knowledge-driven organization are designed to improve the chances that we can generate and use information to ensure a vibrant future.

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Living Lives of Sacred Responsibility

John S. ***Ruskay***

We are at yet another extraordinary moment in Jewish history. During the first part of the 20th century, we focused on enabling waves of immigrants to integrate successfully into America; for the second part of the 20th century, while continuing to build local communities, we responded to the urgent need to rescue Jews and to build the Jewish state. Our efforts were essential in bringing three million Jews from throughout the world to Israel to establish new lives in freedom. Today the "age of rescue" is behind us, and Israel continues to face formidable external and internal challenges beyond what we imagined only a decade ago. Yet Israel today is nothing less than an economic, cultural, and democratic miracle.

As American Jews, we find ourselves in the most accepting and generous society where Jews have ever lived, having achieved status and influence far beyond what our grandparents could have dreamed. We are no longer a kept community fortified by exclusivist American social norms. The continuing challenge is to summon the will and the resources to answer this question in the affirmative: Can we create Jewish life and Jewish communities that are sufficiently inspiring and compelling so Jews choose to self-identify not because they have to, for they do not; not because of guilt, for they have little—but because Jewish life provides meaning, purpose and community; because engagement in Jewish life ennobles and enriches their lives; and because we have provided a means for engagement in the world, framed by the wisdom and values of our people and the recognition of shared history and destiny? We have made substantial progress, to be sure, but much work remains. Being among the first Jewish generations to live with such freedom—whether in New York, Tel Aviv, or Moscow—provides new challenges and awesome possibilities. Meeting these challenges will be the work of our generation and the many that follow us.

Can we create Jewish life and Jewish communities that are sufficiently inspiring and compelling so Jews choose to self-identify?

Many people ask me how can I do this work with such apparent joy. Whether at the Society for Advancement of Judaism on West 86th Street, the 92nd Street Y, Jewish Theological Seminary, or at UJA-Federation, my work has had a single mission: to enable larger segments of our community to experience the inspiring nature of Jewish life at its best.

Indeed, I embrace this work because it brings together my primary formative experiences. For me, Jewish life and Judaism provide a way of understanding and appreciating the gift of life itself. Summers at Jewish camp introduced me to the power of vibrant participatory Jewish community. Reinforced by participation in youth groups and Israel trips that forged my bonds with our Jewish

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This article is based on a speech given by John Ruskay on December 8, 2009, reflecting on his ten years as CEO of UJA-Federation of New York.

John S. Ruskay *came to UJA-Federation in 1993 and served in several positions before being appointed executive vice president and CEO in October 1999. He previously served as educational director of the 92nd Street Y from 1980 to 1985 and as vice chancellor of the Jewish Theological Seminary of America from 1985 to 1993. Dr. Ruskay graduated from the University of Pittsburgh in 1968 and earned his doctorate in political science at Columbia University.*

homeland, these experiences led many of my peers and me to understand that we could create Jewish communities that were vibrant, that provided both meaning and community. But as I said when I assumed my role in UJA-Federation more than a decade ago,

Those experiences were about far more than personal exhilaration; they were about learning deeply what the book of Genesis intended by its insistence that "life is good," and about appreciating and acting on the injunction l'kadesh oto, to sanctify life, to make life holy. I experience our tradition as nothing less than a glorious sacred repository that enables each of us to savor every breath of life and to value every human being as created b'tzelem elohim, in the image of God.

My work at UJA-Federation also draws on a second core element of who I am. My parents, Edith and Everett Ruskay, *z'l*, recognized that our family was economically blessed. They were role models in empathizing with the less fortunate. In many contexts—as activists to stop wars they considered unnecessary, in the civil rights movement, and in supporting local efforts to provide food and clothes for the poor—they taught me to feel responsible for all and to act on it.

Here at UJA-Federation, I am able to bring these lifelong passions together to nurture and encourage participation in inspired Jewish communities and to extend care to all in need: the isolated elderly in Brooklyn and the former Soviet Union, the new immigrant in Israel, and the recently unemployed—indeed, to care for both the Jewish community and the entire community.

How we understand the present moment and what is required becomes critical in shaping Jewish life for our children and grandchildren. The chair of the Jewish Agency, Natan Sharansky, has sagely observed, "Identity is now the driver for everything we care about. If one is not positively identified, why care about the Jewish poor, renewing Jewish life in the former Soviet Union, or securing the Jewish state?"

We in America are experiencing both erosion and renewal. While contemporary culture is attractive and seductive to large numbers of Jews, there is a simultaneous parallel burst of Jewish creativity and energy. Hence the overarching challenge is to take the steps needed to strengthen the forces for the revitalization of our community and our people.

In this context, I want to go beyond the broad vision and strategies that I discussed when I came to UJA-Federation. The experience and accomplishments of the past decade confirm that vision and those strategies to create inspired communities and caring communities that are connected to Jewish communities globally. I want now to address four issues that require our focus and attention if we are to continue to fulfill this vision.

For the immediate future, a top concern is the crisis of the lack of affordability of Jewish life. Tens of thousands of our young—in New York, throughout North America, and in the former Soviet Union—are being turned away from Birthright, Masa, Jewish summer camps, and Jewish day schools. They seek to experience the best of Jewish life, but for a lack of resources, large numbers cannot. Although multiple factors affect the decision to participate, the current economic crisis exacerbates the squeeze both on the poor and middle classes, leading

growing numbers of Jewish families to forfeit enrolling their children in these programs.

We must address the affordability issue, or we will deny growing segments of our people the opportunity to join our ranks and participate in what have been confirmed to be the most powerful Jewish experiences that can shape identity, particularly for those not raised in highly identified families or communities. It is time for Federations, foundations, major philanthropists, and all who care about the Jewish future to come together, pool our thinking, and determine a course of action—if we do not, we will have squandered a unique opportunity to engage large numbers of the next generation.

My second concern is the reweaving of our community. When I called for placing social workers in synagogues 10 years ago, none of us could have anticipated the positive impact their placement would have both on our synagogues and our human service agencies. Today, there are social workers in more than 150 synagogues, connecting the resources of our network agencies to synagogues and their members, thereby enabling synagogues to provide care to congregants in new ways. We are consciously reweaving the community by connecting our human service agencies more directly in the places where Jews come together as Jews. This paradigm needs to be extended and expanded to Jewish day schools, to Hillels, and to additional JCCs. Instead of bifurcating human services and Jewish education, we have come to understand even more fully that both are essential for a stronger Jewish community.

My third concern is our future role in Israel. The Jewish state is no longer a fledgling economy in need of philanthropy for its survival. Israel's GNP is now $180 billion; North American Jewish philanthropy annually approaches $2.5 billion. Although our funding supports important work in Israel, we must consider new ways to engage in strengthening Israel. This will require us to develop new partnerships with Israeli philanthropists and with the government of Israel so that together we can again take on major challenges facing the Jewish state and its people. Israel is one of the two main stages of Jewish life today, and effective engagement with Israel is imperative both for American Jewry and Israel and for strengthening the bonds of our people.

Effective Israel education provides settings to work through difficult historical and moral issues.

And this leads me to the fourth issue. Too few of us—on and off college campuses—are able to effectively respond to Palestinian claims or to campaigns that seek to delegitimize the moral basis for Israel.

The last decade has demonstrated the importance of Israel advocacy. We have provided support for multiple advocacy efforts and will continue to do so. However, in conflating Israel advocacy and Israel education, we deny members of our community the opportunities to deepen their own engagement and bonds to Israel by developing their own positions and perspectives. At its best, Israel education prepares young and old to develop their own positions, their own conflicting visions about what Israel can and should be. Effective Israel education provides settings to work through difficult historical and moral issues while deepening knowledge and solidifying personal commitment to and engagement with Israel.

In cooperation with the Jewish Agency's Israel Engagement Center/Makom and other Jewish organizations, we will embark on a major effort to enable young and old to legitimate Israel—not by defending a given party line, but rather on the strength of the positions they have developed after wrestling with Israel's

history and difficult existential issues and reconciling their views with their deepest values.

These four issues—the affordability of Jewish life, reweaving our community to connect our *hesed* work more deeply in the Jewish community, our future role in Israel, and differentiating Israel advocacy and Israel education—will augment our continuing commitment to the vision of creating "inspired and caring communities."

When I was recently asked how this work will proceed, I answered quickly: We will take on new challenges while intensifying what we have initiated, informed by the successes and disappointments of the last decade. We will continue to strengthen UJA-Federation's unparalleled network of agencies: 24 JCCs and Ys, 11 Jewish summer camps, Hillels on 12 campuses, our human service agencies, and our overseas partners—the Jewish Agency for Israel and the American Jewish Joint Distribution Committee. For these agencies actualize our mission every day. During just this past year, they

- provided food to more than 120,000 New Yorkers
- provided food, medicine, and health care for 168,000 elderly Jews in the former Soviet Union
- made it possible for 22,000 of our young to attend Jewish summer camps and 6,000 to participate on Birthright trips
- enabled 15,000 to make *aliyah* and establish new lives in Israel

And it was these agencies that provided the foundation for us to respond boldly to crisis: we saw this on 9/11 as well as during Israel's wars in Lebanon and in Gaza. Most recently, we met the challenge of the great recession with Connect to Care. In its first six months, it provided emergency services, family and vocational counseling, pro bono legal support, and the embrace of a community to thousands of New Yorkers who lost their jobs during the economic downturn. Because our agencies were in place, we were able to respond quickly and effectively.

Connect to Care also demonstrates why "innovation" ought not be considered the sole province of start-ups. Rav Kook, the first chief rabbi of the Jewish community in Palestine, was fond of saying *ha-yashan yit'chadesh, ve'he-chadash yit'kadesh*. This phrase is a Hebrew play on words that translates as "that which is old will be made new and that which is new will become sanctified."

"That which is old will be made new." Division by division, agency by agency, program by program, we have challenged ourselves to reimagine and reinvigorate how we prioritize, raise funds, deliver services, and measure effectiveness.

"That which is new will become sanctified." At the same time, we have seeded and nurtured a dazzling array of start-ups and initiatives viewed as urgent for the Jewish future. We opened the first free-standing Jewish residential hospice in North America and created the Israel Trauma Coalition. We created the Leadership Institute for Day School Management at Columbia Business School. Avodah, Jdub, Kol Dor, as well as scores of others received encouragement, support, and funding from UJA-Federation.

Paraphrasing Rav Kook, we innovate to create new models that ideally will need to be sustained. And we sustain agencies and initiatives both to serve the needs of the community and to provide the platform for ongoing innovation.

Having ended the anachronistic division between domestic and overseas services because we recognize that those who care about Jewish life do so globally; having instituted mission-based planning and priority-based allocations; having restructured our fundraising from product-based to market-segment-based, allowing us to more effectively work with our major donors, we are moving forward in these areas:

- We will deepen our efforts to strengthen synagogues.
- We will expand our efforts to engage Russian-speaking Jews in New York who now number at least 20% of our community; we will also foster Jewish renaissance in the former Soviet Union and Israel so far larger segments of our people can experience the breath of Jewish life.
- We will pioneer efforts that bind our people together by seeding initiatives to strengthen collective Jewish identity.
- We will deepen our commitment to transparency and the highest standards of ethical conduct.
- We will continue our efforts to make UJA-Federation a better place to work for both professionals and volunteers, because we recognize that one cannot call for creating "caring and inspired communities" out there while not working to make it real within our walls. Although we have made progress, far more is needed.
- And we will continue to strengthen our communications program—as evident this year with our new video, our new publication, *The Flame*, and our new web platform.

But above all, we will continue to hold high the banner of Jewish communal collective responsibility. In a culture too often defined by rampant individualism, including in philanthropy, we affirm that we are indeed part of a people and a community that promote the axiomatic value of our responsibility for one another, of the shared and mutual responsibility of each and every member of the house of Israel. We do this not only because it is the core foundation on which the work of Federation rests. We do this because it is a core principle on which the entire enterprise of the Jewish people rests. Our reciprocal responsibility is not a gimmick; it is not a technique. It is who and what we are about.

Our reciprocal responsibility is not a gimmick; it is who and what we are about.

Federations, including ours, are not without flaws: We are sometimes characterized by laborious processes that are sometimes too slow to change. But I have come to believe that Federations represent the very best of *areyvut*—responsibility for an entire community and for an entire people. Although some view our Annual Campaign as anachronistic, I see it as an inspired cause, an educational curriculum enabling each of us—even those who have lost considerable wealth during the past year—to recognize that we remain among the most privileged human beings who have ever roamed this planet, and certainly among the most privileged Jews.

Our Annual Campaign defied those who predicted that Federations would decline in dollars raised. During the past decade, with talented volunteer and professional leadership, we raised $2.1 billion dollars; doubled our endowment from $324 million to more than $700 million; and increased our Annual Campaign from $117 million in 1999 to $153 million in 2008. Last year, even with a decline in our Annual Campaign, our total revenues exceeded $215 million. We

have reengineered the campaign divisions that work with those in their 20s, 30s, and young families.

Yet it is not the dollars raised that we ought celebrate, but it is what the Annual Campaign makes possible and what it represents. Our Annual Campaign provides support for institutions essential to the Jewish community and core funding for human service agencies that, in partnership with government, extend care to every part of our city. I see our campaign as actualizing our abiding commitments to both teach Torah and, in the words of Isaiah, "feed the hungry, house the homeless, and clothe the naked." I also see our Annual Campaign as asking every Jew to accept responsibility for the entire Jewish people—those we know and those we do not, those with whom we agree and those with whom we do not—to make sure that each has the ability to live with dignity. Our Annual Campaign recognizes that, although we may understand God, Torah, and commandments quite differently, we share both history and destiny. What a sacred curriculum at this moment in time—for our people and beyond.

Serving as the CEO of UJA-Federation has its challenges, but truly it is a privilege. The Hebrew word for work—*avodah*—also connotes service and prayer. For me, serving as the senior professional at UJA-Federation of New York, as the heir of a philanthropic organization second to none, combines work, service, and prayer.

Haverim, ten years after we presented hopes and plans, I stand before you proud of our shared accomplishments and eager to deepen this work and take on new challenges. I remain confident that we can seize this historic opportunity to continue to renew and revitalize Jewish life. I know we can. And together, I believe we will. We are each architects of the Jewish future.

We will do so building on the accomplishments and learnings of the past decade and the progress we have made to create communities that beckon young and old not on the basis of guilt or obligation but on the basis of what they offer; modeling care for all both within our community and beyond; strengthening the commitment to *areyvut*—responsibility—for the whole community, our city, and our people. As we do this, we will improve the likelihood of a strong and secure Jewish future and model for our own people and all of America what it means to live lives of sacred responsibility. We can be, yet again, an *or l'goyim*—a light unto the nations.

Judaism and the Singularity

Using Futurism to Predict Possible Trajectories of Jewish Identity and Community

Paul ***Golin***

What if, at the push of a button, you could have a more profound sense of the Divine presence than you have ever had before? Or study text *b'chavruta* (partnered) with Maimonides himself? Or literally stand at Sinai when Israel received the Torah, the ground shaking beneath your feet as the mountain becomes engulfed in clouds and flames as heaven touches earth? What would it mean for the Jewish community to be able to provide Jews with overwhelmingly powerful spiritual experiences, instantly?

And what if that button for profound Jewish experiences was also available to every person on the planet?

Now imagine everyone, including Jews, having access to the same kind of buttons for every other world religion as well. Actually feel the radiant warmth of Jesus' palm on your forehead, healing you. Meditate to a new spiritual plane under the Bodhi tree with Siddhārtha Gautama Buddha. And imagine having access not just to religious but to ethnic experiences as well. Fully embrace a Han Chinese sense of collective destiny. Then, engage in an intense connection with the natural world as an indigenous Amazonian tribesperson.

If you had all those buttons, would you choose just one religion or ethnicity and stick to it loyally, or would you pick and choose from various experiences? Would you do them all? Or make up something completely new? If access to any human "identity" was equal, based only on interest or need, would there be more Jews in the world than there are now or less? What would being "Jewish" even mean?

If access to any human "identity" was equal, based only on interest or need, would there be more Jews in the world than there are now or less?

This scenario may seem like an exercise in science fiction writing, irrelevant to today's concerns. Actually, the future may be closer than you think, and the trends that will affect our future are already coming into focus and having an impact on the organized Jewish community. A fully immersive virtual world will accelerate the trend, but already in our real world people are choosing their religion. According to the 2009 "Faith in Flux" study from the Pew Forum on Religion & Public Life, "about half of American adults have changed religious affiliation at least once during their lives." How is the Jewish community competing, if at all, in today's reality of religion-shopping within the marketplace of ideas? And within the marketplace of spiritual experiences?

Future trends will have a dramatic impact on Jewish religious and ethnic identity in ways that are not being discussed often enough in the organized Jewish community. In part, this lack of discussion occurs because we are not engaging futurists in our planning (or planning much beyond next year). And in part it occurs because we do not have answers for those who are moving away from both Jewish religious and ethnic identity yet still call themselves "Jewish."

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EXPLORING THE JEWISH FUTURE

For a people rightly obsessed with our past, we have also become very good lately at incorporating the word "future" into our communal conversation. Various organizations and foundations have hosted conferences and gatherings around the theme of the Jewish future. Most of the conversation, however, is actually about what is missing or needed from *today's* Jewish community, not about what we might expect 20 years from now.

That is not a criticism; it is certainly important and even essential to address the current trends affecting our organizations and individuals. When a conference exposes Jewish communal professionals to innovators with new and effective methods or programs, whether from within or outside our sector, it informs the "future" of our own work, even if that future is the improvements we make in a week or month from now.

For example, most sessions at the Jewish Outreach Institute's Judaism2030 Conference, held in New York City in May 2011, fell into that category of making available the stars in our community who are successfully addressing current challenges, for those whose organizations' futures rely on their ability to adapt to the present. However, it did also address the "further future" in several sessions.

By opening with a keynote from a futurist, the Judaism2030 Conference provided a vision of where society—human society, not just Jewish society—might be in 10 or 20 years. Of course future predictions are often inaccurate, even by those who make their living as "futurists," but the purpose was to encourage conference participants to measure their organizations' current activities and goals against what we might reasonably expect to see in the coming decades. The presenter who relied most on futurist predictions was Jewish activist Daniel Sieradski, whose fascinating and humorous presentation is available online (google "Jeuromancer" and click on the speaker's notes under each slide).

Although Sieradski describes a dystopian future that I hope we can avoid, I do share his belief that technology is going to radically change humanity as we know it. We both derive our understanding of the future from the important conversations that are already happening among scientists, entrepreneurs, and other futurists that Jewish communal professionals can and should be accessing to illuminate where current trends may lead.

The Singularity is Near

America's preeminent futurist is Ray Kurzweil; his seminal work, *The Singularity Is Near: When Humans Transcend Biology*, popularized the idea of using technology to accelerate human evolution (his predictions were the cover story of *Time Magazine* in February 2011). In his book, Kurzweil defines the singularity as "a future period during which the pace of technological change will be so rapid, its impact so deep, that human life will be irreversibly transformed. Although neither utopian nor dystopian, this epoch will transform the concepts that we rely on to give meaning to our lives, from our business models to the cycle of human life, including death itself" (Kurzweil, 2005).

Kurzweil predicts that the technological singularity—the point beyond which computer intelligence (or really, merged human-computer intelligence) surpasses human intelligence and improves itself so quickly that we simply cannot predict with any accuracy what comes next—will happen in the year 2045.

The vision of medical and technological advances described in Kurzweil's book as a way to transcend death by merging with machines—"mind uploading" our consciousness to computers so as to indefinitely extend our lives—has been derided as "the rapture of the nerds." But Kurzweil is evangelizing and building on ideas that many of the most important people in the scientific and technology community share. They do not all agree with his timeline or the exact outcomes, but there is general consensus about where the exponential advances in genetics, robotics, nanotechnology, and artificial intelligence will lead—to what author Joel Garreau calls "radical evolution" and others call "transhumanism" (Garreau, 2005).

We have all experienced how rapidly technology has changed in our own lifetimes. Five years ago, almost nobody had "smart phones." Today, if you went to work and forgot your iPhone at home, how helpless would you feel? We are already "offloading" a segment of our brainpower to the computers in our pockets (when was the last time you memorized a phone number?). This year the first mass-market wearable computer—Google glasses, in which information will appear in your field of vision as a heads-up display—will become available. If in 10 or 20 years personal-computing technology continues to shrink so much that it can be swallowed in pill form so that you will have your computer with you at all times and operate it with your thoughts, would you swallow that pill? I bet yes (especially if it has an Apple logo on it). Because each preceding generation of computer prepares us for the next, the advances feel almost seamless.

How long will it be until technology makes possible the virtual reality that can create experiences like those I describe in the beginning of this article? Whether it takes another 10, 20, or even 30 years, the Star Trek "holodeck" is coming (Silbey, 2013), and many of us will live to see it.

But of course the bottom-line question remains: Is it good for the Jews?

Utopia or Dystopia?

We are already "offloading" a segment of our brainpower to the computers in our pockets.

There are really only three ways the future can turn out: amazing, disastrous, or something in between. Despite his claim of a future that is "neither utopian nor dystopian," the singularity described by Ray Kurzweil leans heavy utopian—it is still "us" inside the computers, and we have transcended all that ails us. Futurists such as Peter Diamandis, founder of the X Prize Foundation and author with Steven Kotler (2012) of *Abundance: The Future Is Better Than You Think*, also predict good times. However, others envision a future in which we either never get a chance to make that great technological leap because of our own self-destructive tendencies, or once we make the leap the machines are so much smarter than us they have no need to keep us around any longer.

In the dystopian Jewish future imagined in Dan Sieradski's "Jeuromancer" there is a split between ultra-Orthodox and more liberal Jews over the halachic (Jewish legal) acceptance of transcending our biology through technology. Their rejection of these advances actually leaves the ultra-Orthodox less susceptible to the eventual machine enslavement of humanity:

The choice those Jewish people who resist getting chipped [having technology implanted into their bodies] face is between being Amish, and simply allowing the future to pass us by as we sit on the sidelines, or being like the Luddites and rising up and taking action against the future. The battle over assimilation will no longer be merely about intermarriage and a loss of traditional values, but about the loss of our humanness overall, let

alone the last vestiges of Jewishness.… the ba'al teshuvas will be those who remove their chips and rise up against the system that seeks to enslave them, living as outcasts, as Ivri, on the edges of the mainstream society (Sieradski, 2011).

I do not see the future so negatively. Indeed, if the future *is* dystopian, I think the Jews are better prepared for it than most. We have already come to the brink of extinction, we are continually grappling with existential threats, and many of the communal structures we have built are all about "survival." If things go south, we are already highly organized. And in the absolute worst-case scenario, Israel has the bomb. Future attempts at Jewish extermination come with a much higher price this time around.

No, I am not worried about our performance in an end-of-days collapse of civilization. Instead I am much more interested in what happens to the Jews in a more utopian future (which also happens to be the future I prefer). I imagine there will be good and bad aspects of life for as long as there is life, but in the spirit of *tikkun olam*, I hope we can move the needle incrementally closer to good than bad with each passing year. In his book, *The Better Angels of Our Nature: The Decline of Violence in History and Its Causes*, Steven Pinker suggests that is exactly what is happening: Human beings are becoming increasingly less murderous brutes (Pinker, 2011).

We have made some progress toward improving human nature, but unlike technological change that increases exponentially, our growth as people—emotionally, ethically, spiritually, and creatively—has been linear at best. For example, today there is a greater quantity of excellent literature produced than at any time in the past, but how much of it surpasses the greatest works, such as those by Homer written almost 3,000 years ago or by Shakespeare 400 years ago? Jews are rightfully proud of our historical contributions toward the betterment of human nature, yet all the themes of emotional failing contained in our ancient literature still resonate today. We have not eradicated jealousy, anger, adultery, or greed, even as we stand on the cusp of revolutionary alterations to human physiology.

Since technology is moving at a much quicker pace than human emotional development, there certainly seems to be a place for the great compendium of ancient wisdom and ethics contained in the Jewish tradition. In a paper titled "The Immorality of Immortality," Hava Tirosh-Samuelson, one of the few thinkers engaging the singularity from a Jewish perspective, writes the following:

We should not categorically reject these [technological] advances because many of them do and will alleviate human suffering and misery. However, we should not let scientists alone determine our technological future. Rather, we must involve theologians, philosophers, ethicists, historians, sociologists and political scientists in the conversation about technology and not be afraid of robust debate (Tirosh-Samuelson, 2008).

TRENDS AND COUNTERTRENDS

For Judaism to remain relevant in a future made better by rapid technological advances, we must more effectively address existing challenges to Jewish life that will only become more pronounced as we move forward. "Challenges," however, mean different things to different Jewish communal professionals, depending on their perspective. There are seemingly contradictory concurrent trends and countertrends. For example, Jews are becoming more religious *and* more secular. However,

if seen as a "big tent," Judaism has enough room for movement in all directions, even room for those who do not recognize the others in the tent as Jewish. Therefore, working toward seemingly opposite goals is not necessarily counterproductive; it can make us stronger through diversity, a kind of bet-hedging.

The trends I spend most of my days working on are about disengagement from organized Jewish life by a growing number of Jews. This is an issue on which much of the community is also focused. And although the programmatic responses vary widely, the general approach or "solution" is the same almost across the board—from Orthodox through Reform, JCCs through innovative start-ups: *Get more Jews doing Jewish with other Jews*. Reinforce Jewish "identity" by increasing either religious and/or ethnocultural connections, experiences, and learning.

I do not object to that approach and in fact promote it, because it works for some people. However, I have also come to recognize why it will not work for others, particularly those who frequently identify as "Just Jewish," one of the largest and fastest growing demographic groups of our community. When framed against the expected trends of a more utopian future, it becomes even clearer why the community-wide approach to engagement does not work for them and why we need to create additional movements within the big tent.

Transcending Biology

Singularitarians seek to enhance current human physiology to allow for dramatically increased longevity and intellect (and endurance; Kurzweil imagines oxygen-carrying nanobots in your bloodstream that allow you to sit at the bottom of a swimming pool for four hours without drowning). We have already seen the first early human-machine mergers, such as artificial hearts and brain implants for seizures. Replacement parts do not all have to be machines; scientists are currently growing organs in labs and human ears on the back of mice.

For many, "tribalism" is something that happens in the most dysfunctional parts of the world, and it is something to be overcome.

Judaism is a religion that promotes life above all else, so there is compatibility with such advances but there is also an inherent challenge: the Jewish people are overwhelmingly "biological"—that is, Jewish by birth. The organized Jewish community celebrates Jewish tribalism. We are "M.O.T.," members of the tribe. Jewish Federations of North America's national conference for young leadership is called "Tribefest."

I am not suggesting that people who feel a special comfort in being a "member of the tribe" are wrong for doing so or should stop feeling that way. However, I do want to raise awareness that there are Jews who are deeply uncomfortable with the notion of Jewish tribalism. For many, "tribalism" is something that happens in the most dysfunctional parts of the world, and it is something to be overcome.

More importantly, "tribalism" sets boundaries inside which many Jews do not feel included. Today there are more intermarried than in-married households in the United States; more individuals under the age of 20 were born to just one Jewish parent than to two Jewish parents. Many children of intermarriage feel they cannot abide by the exclusivity of tribalism without cutting off half their family, which few are willing to do.

The sentiment behind tribalism is also expressed through words like "ethnicity" or, more recently, "peoplehood." In "The Case for Jewish Peoplehood: Can We Be One," Drs. Erica Brown and Misha Galperin offer a very thoughtful

meditation on the topic, but ultimately do not provide a clear enough differentiation between peoplehood and tribalism, particularly when they repeat the long-standing fallacy that intermarriage is synonymous with out-marriage and disappearance. They write, "Many intermarried individuals who care about Judaism understand that their personal choices—while clear to them—do not make sense on a communal level and are destructive to the peoplehood equation" (Brown & Galperin, 2009).

I am an intermarried individual who cares deeply about Judaism, and although I did not intermarry to make a statement to the organized Jewish community, I believe that intermarriage is healthy for Jewish "peoplehood," because the tribal definitions currently used are growing increasingly incompatible with the future I hope to experience. It certainly would send a powerful message to "Just Jews" like myself if a leader of a major national Jewish movement would loudly proclaim that because we are entering an age when being Jewish, particularly Jewish-by-birth, is increasingly irrelevant to being a good "citizen" of the Jewish community, intermarriage is no longer a useful measure of anything.

"Multiethnic" does not mean Jewish ethnicity dies or has to become less intense. People, particularly young people, have a remarkable ability to compartmentalize and express many simultaneous identities, and I believe future technologies will enhance, not diminish identity experiences. Jewish ethnicity was going to change anyway. Our expressions of Jewish identity are not the same as our grandparents', so why should we hope our grandchildren's will be exactly the same as ours?

Ubiquitous Judaism

In letting go of Jewish tribalism, the logical place to turn might be to Judaism as a religion. And indeed, important segments of our communal tent seem to have done that. Although all of the denominations have shifted over the past two decades toward greater religiosity, it is particularly interesting to note that shift among the Reform movement, which during that same time welcomed huge numbers of interfaith families. Could it be that the challenge to Jewish ethnicity inherent in welcoming non-Jews into our "peoplehood" forced the movement to ask itself what being Jewish really means, and that the answers they found were about ritual and belief?

I believe that intermarriage is healthy for Jewish "peoplehood," because the tribal definitions currently used are growing increasingly incompatible with the future I hope to experience.

As thankful as I am that intermarried households seeking Jewish religion are finding an increasingly warmer welcome in many synagogue communities (Zeveloff, 2011), Judaism as a religion is not the answer for my segment of "Just Jews," primarily because many of us do not believe. Of course, many Jews struggle with belief. For decades, Jews have scored the lowest among all religions or ethnicities on studies that asked about belief in God; for example, the "Jewish Distinctiveness In America" survey found only 27% of Jews agreed they "know God exists," compared with 59% of Liberal Protestants, the next lowest scoring group (Smith, 2005). Although many non-believing Jews still find meaning in synagogue participation, many more do not, yet movement leadership makes clear that God worship is a central purpose of affiliation.

So now that I have knocked down the two central pillars of Jewish American identity—ethnic and religious–what is left? Zionism? Ethical culture? Social justice? Secular engagement with sacred texts?

For me, what is left is all of it, none of it, and pieces of the ethnic and religious too. The description of Judaism that resonated most for me was from Rabbi

Irwin Kula, president of CLAL: The National Jewish Center for Leadership and Learning, who spoke passionately at the 2009 Jewish Outreach Institute national conference about "Judaism as a Technology" (for a video clip, search YouTube for "kula technology"). He referenced Maimonides to claim that the only important measure about any mitzvah—for example putting up a mezuzah—is not counting how many people do it, but determining what it does for the individual—and whether it helps mitigate violence and/or develop virtue. Kula also challenged the notion of peoplehood by stating that Jewish wisdom is for everyone who wants it. To me, that is the starting point.

In Ray Kurzweil's vision of a postsingularity future, the universe will "wake up" with intelligence everywhere, because having data written in subatomic particles means that even an inanimate object like a rock can be filled with information. I envision a "Ubiquitous Judaism," available everywhere for anyone who wants it. If there is a special role for Jews at all, it should be in explaining to anyone who might benefit how each piece of Jewish technology works to improve people's lives or the world. Judaism can be a part of everyone's identity (in the future, it will be anyway).

Just as we cannot see beyond the technological singularity with any certainty, I do not know where such an experiment might lead. However, I would like to bring likeminded, future-oriented "Just Jews" together to create something new that would also acknowledge the old; make it accessible for everyone; infuse it with depth of meaning; and use David Ben-Gurion's definition of a Jew as "anyone who's meshuggeneh enough to say they're Jewish." Let's try to ensure that as the definition of "human" inevitably evolves, we also offer, for those who are interested, a compelling and useful Judaism for all.[1]

Jewish wisdom is for everyone who wants it.

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[1]For a daily moment of awe about where we are potentially headed as a species, I encourage you to subscribe to the free e-newsletter at www.KurzweilAI.net, which provides links to new articles in mainstream media about the latest advances.

Innovation and the Jewish Family Services Network

Lee ***Sherman*** *and Lisa Kahn* ***Budlow***

Newark, New Jersey, in 1861 was like many emerging cities on the East Coast of the United States. The still young country was growing in population and commercial enterprise, but success was not shared by all. The Civil War was looming in the near future, but for many, an economic downturn in 1857 had brought more immediate personal issues. The unemployed crowded the sidewalks of Broad Street begging for assistance.

The city's response was to cram as many needy people as possible, and more, into the almshouse. Orphans, widows, the elderly, "lunatics," drunkards, the blind, deaf, dumb, incurably ill, and "paupers" were all thrown together in deplorable conditions. Although there were not large numbers of needy Jews among the destitute of Newark, there were Jewish widows, orphans, and the unemployed who required assistance. So, 14 young Jewish businessmen gathered on January 2, 1861, and formed a benevolent association to assist their fellow Jews (Wallerstein, 1962).

Much has changed in the 151 years since those 14 social innovators met in a parlor in Newark. The benevolent association formed on that night has evolved along with these changes, guided continually by the goal to meet the needs of individuals and families in the area surrounding Newark. Today, the organization that formed from the inspiration and dedication of those 14 young men is known as Jewish Family Service of MetroWest.

Many Jewish family service agencies have similar origins as 19th- and early 20th-century start-ups. They were built on ideas that responded to unmet needs. They were born from a willingness to help others, the inspiration and perseverance to solve a pressing social and community challenge, and a recognition of the obligation to make the world a better place for the vulnerable among us. These same qualities have led these long-standing organizations to evolve and regenerate, like Jewish Family Service of MetroWest has done, to continue to meet the needs of their communities.

INNOVATION DEFINED

Innovation is a term often used in both for-profit and nonprofit managerial circles. Many assert that innovation is a key to success. Some say it is necessary for survival, and probably all agree that new ideas keep people interested in an

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organization. People are always talking about innovation, but what does it really mean? How does innovation look in the real world?

The *Merriam-Webster Dictionary* defines innovation as "the introduction of something new." There are two parts to this definition—the novel creation itself and the process of introducing the creation. It is a noun, but an active noun, one that necessarily implies the effort behind the objective. Looking deeper at how innovation plays out in real scenarios, two more elements emerge. First, an innovation must produce value. People do not refer to a product or service as innovative if it detracts or does not add value. Second, an innovation is typically introduced to fill a void or improve a process. Imagine the bright thinker identifying an unmet need and developing, testing, and finally introducing a new idea that will produce enough value to meet this previously unmet need. That is real action and true innovation.

Successful nonprofits, whose missions are rooted in meeting unmet needs, continually innovate on many levels. The term "innovation" can include the work of any organization redefining its target audience or service methods to provide greater results. Over the past 10–15 years, the nonprofit sector has experienced an influx of products, methods, and matrices for measuring the impact of its service. Executives analyze reports, assess their theories of change, and redesign service methods for a greater likelihood of mission fulfillment. The value produced by the redesign that fills the prior void in a novel way is innovation.

For us, the current question is, How can this ongoing innovative process be encouraged to reach its greatest potential? In the *Harvard Business Review* article, "Managing Your Innovation Portfolio," Bansi Nagji and Geoff Tuff (2012) introduce a tool they call the *Innovation Ambition Matrix*. They note the broad spectrum on which organizations can invest in innovation, with varying degrees of risk and reward. The closer the new initiative is to the current operations, the lower the risk and the greater the likelihood of success. The further the novel idea is from the current business, the greater the risk, but the greater the potential is for a successful innovation to have transformative effect. Nagji and Tuff counsel organizations to "simultaneously invest at three levels of ambition, carefully managing the balance among them." Strategic innovation should involve a balance of core, adjacent, and transformational initiatives to ensure that the organization continually produces value.

Strategic innovation should involve a balance of core, adjacent, and transformational initiatives to ensure that the organization continually produces value.

INNOVATION AND INCUBATION

As a result of the emphasis on novelty in innovation, creativity is generally understood to be a crucial element. It is difficult to argue with that premise. We might picture an innovation as the light bulb over the head of a person who can find solutions by thinking "outside the box." But what does this creative innovator really look like? Do innovations spring only from young, unencumbered minds? Is it the lack of baggage of the rogue entrepreneur or the basement startup that enables free thinking and true innovation to occur? And are those with years of experience in the field too ingrained in the way things have always been done to find solutions in novel places?

Much young, unencumbered innovating is happening today, particularly in the Jewish community. The next generation has caught the attention of the establishment. They are an energetic force—smart, networked, and driven to

make a difference. But remember our definition. True innovation requires novelty coupled with an existing void and effective application of the novel idea to fill the void. It is at the intersection of idea and execution that the destiny of an innovation is determined. Young entrepreneurs operating in a vacuum are less likely to have a sense of where the voids reside in the system and which methods of execution have the best chances of success. But couple their energy and outside-the-box creativity with the history and outcomes analysis of established organizations, and you have a recipe for positive outcomes.

Numerous Jewish organizations have sprung up to reside in the space where idea meets execution. They are incubators—backed by the wisdom and resources of established entities and put in place to help bring new ideas to fruition.

Bikkurim: An Incubator for New Jewish Ideas was one of the first to promote the interface between new Jewish ideas and the established Jewish community. Understanding the risk involved in entrepreneurship, and recognizing that not every innovative ideas will succeed, founding board member Martin Kaminer reasoned: "What's key is that some of these organizations are going to be the Hillels and Hadassahs and B'nai Briths and ADLs of our children and grandchildren's time. But I can't tell you which ones" (http://bikkurim.org/node/65). Bikkurim has helped propel many organizations to initial success, including Limmud NY and Sharsheret, and has begun to assist some organizations to accelerate from initial start-ups to the complex second stage of development.

Many others, including JumpStart, PresenTense, ROI, Joshua Venture Group, and UpStart Bay Area, have emerged to enhance the field of Jewish incubation. All connect well with creative, passionate, and dedicated young entrepreneurs, and all are well connected with established Jewish entities that provide support to help turn creative ideas into realities that benefit the Jewish community.

UpStart Bay Area, in particular, has made clear the necessity for connectedness between emerging and established entities. Support for creative, new ideas sometimes may happen in a vacuum, but it takes connectivity to bring those creative, new ideas to fruition in a way that can add real benefit to the community at large. Operating within the web of the community brings the kind of reality check that will select for success the innovations that meet real voids. And connecting with larger entities provides the creative start-ups with the capacity to execute on these ideas, thereby turning ideas into results. Once inspired, it takes a lot of hard work to turn idea into reality.

It is at the intersection of idea and execution that the destiny of an innovation is determined.

Incubation Relationship

Incubation is a process of providing favorable conditions for growth and development, but creating these favorable conditions for growth can take a variety of forms. It makes sense to look at incubation as a continuum. The lighter touch involves mentoring, training, and sharing information on proven models. A next step along the continuum may involve providing office space and technology and sharing expertise in budgeting, marketing, development, or legal affairs. More intensive incubation may involve the pooling of resources; for example, shared staff, a peer community, coordination of events, and group purchasing. An incubator may provide seed money or even ongoing financial support, or it may act as a fiscal agent. It might hire the entrepreneur or absorb the program into its own suite of services.

The value to the start-up of this connection is obvious. The established entity shares resources, knowledge, experience, and expertise to propel the start-up to success. There is an element of risk sharing as well. The larger entity invests in laying the foundation for the start-up, thereby making the new venture less risky.

It seems to us that the value to the incubator is equally obvious. By reaching out to new, organically emerging ventures, the incubator keeps its finger on the pulse of its community. It becomes infused with the energy and passion of the innovator. And it plays an important role in bringing valuable services to people who need them or novel goods to people who want them.

Where the incubator is an organization founded expressly for the purpose of nurturing fresh ideas, its raison d'etre is to participate in the innovative process. Where the incubator is a direct service organization working in the field, the benefits of incubation are multiplied. If the innovation directs value to the same group targeted by the established organization's mission, there is a match. Lending a hand to lift up the new idea invigorates the very field about which the established organization cares most. And the act of associating with the innovative process has the potential to infuse new life into everything the incubating organization does. The result is greater mission impact across the board.

BRINGING JEWISH FAMILY SERVICE AGENCIES INTO THE PICTURE AS NATURAL INCUBATORS

In 2008, several leaders in the Jewish innovation field conducted a "Survey of New Jewish Organizations." The ensuing report—*The Innovation Ecosystem: Emergency of a New Jewish Landscape* (JumpStart et al., 2009)—produced several key findings and recommendations on how the Jewish community can collaborate in nurturing bright new ideas. Let us focus on Key Finding 3:

The vast majority of new initiatives describe their mission category as religion-related, education, art/culture/humanities, or civil rights/social action/advocacy. Very few are focused on service provision, such as human services, mental health/crisis intervention, employment, housing/shelter, or health care.

"The very small proportion of initiatives focused on human services and related missions invites further analysis."

Why are the crucial services provided by the Jewish family service network not the object of start-up innovation? The authors of this report wondered as well, stating, "The very small proportion of initiatives focused on human services and related missions invites further analysis." They speculated about some reasons—the grand scale of resources that are often required to meet social needs or the potential for engaging in human services through non-Jewish organizations. They suggested that in coming years, "innovators may increasingly be motivated to bring their entrepreneurial spirit" to the human service field.

Human services continue to be left out of this crucial conversation, even though the Jewish family service movement has continued to evolve, to adapt, and to persevere in finding effective ways to meet community needs. We propose that now is time to begin including the Jewish family service sector in the Jewish community's efforts to nurture innovation. Given their long histories, their continual evolution and adaptation to meet needs as they arise in the community, are not Jewish family service agencies natural partners for innovation? Given their ear-to-the-ground approach to finding unmet needs and their dogged focus on

measuring impact, do not they have much to contribute to help start-ups execute their ideas in the real world?

Jewish family service agencies have survived and thrived by continually creating where voids exist. This ability to adapt and grow is the reason that Jewish family service agencies are recognized leaders in program development and service delivery in communities across North America. Even in the face of the harsh economic downturn of recent years, when financial resources were scarce and community need was at an all-time high, many Jewish family service agencies met the challenge by being strategic, flexible, and innovative, much like the founders of their organizations had been many years before.

Almost seven years ago, Jewish Family Service of Los Angeles formed a "Future of JFS Committee." This committee engages in rolling strategic planning, creating an ongoing dialogue between staff and board. The result has been the growth of programs in areas in which the agency has always excelled and the ability to serve more people despite the limitations of some of their traditional funding sources. Jewish Family & Career Services of Atlanta credits a culture of change and risk tolerance for their ability to grow and adapt to serve needs not previously served. Jewish Family & Children's Service of San Francisco, the Peninsula, Marin and Sonoma Counties uses a social enterprise model to consistently develop earned income to support social goals. Jewish Family Service of Seattle has placed an emphasis on recruiting board members who are proven innovators in their professional and personal lives. Because the agency is intentionally positioning itself as a change agent in the community, it has become a magnet for new ideas that are realized in services that bring benefit to the people it serves. These are examples of the impact of the spirit of innovation that resides within these agencies.

A Proposal

Steven Johnson (2010), in his book, *Where Good Ideas Come From*, describes the problem-solving process: "The trick to having good ideas is not to sit around in glorious isolation and try to think big thoughts. The trick is to get more parts on the table." In the Jewish community, we have many challenges, some of which we share with the greater community and some that are unique to us. But we are fortunate that we have many "parts" we can bring to the table to mine the good ideas that become the solutions for our challenges.

Individual and start-up organizations should be encouraged to think creatively to serve unmet needs and build a stronger social fabric. As organizations that were formed by such creative thinking and have been able to thrive by continually challenging themselves, Jewish family service agencies are well suited to support this innovation. As a Jewish people, we continually look to develop better ways to serve vulnerable populations and to strengthen the individuals and families who are our community. Bringing together inspired social innovators and Jewish family service agencies that have the experience and infrastructure to nurture and sustain their innovative ideas would have a positive impact on the whole community.

We encourage innovators and start-up organizations to contact the Jewish family service agency in your community. Send an email to its executive director or the director of programs. If you have trouble connecting locally, contact AJFCA, the North American umbrella organization serving the Jewish family service movement. Share your vision and your idea for bringing it to life. Come

prepared with research and data to support your theory of change. Talk with your local agency about ways in which you can collaborate for the mutual benefit of the target audience you both seek to serve. The form that this relationship would take may vary widely depending on the community and the needs, but the ultimate goal of executing and sustaining innovative programming is consistent.

We invite social innovators to attend AJFCA's Annual Conference to learn more about trends in Jewish family service programming and to interact with professionals working on the ground. We envision inspired conversations taking place throughout the convention hallways about new ways we can work together to meet growing needs. And we encourage Jewish foundations, federations, and individuals to support the intersection of innovation and program execution by establishing social innovation funds that will prime this critical work. The spark of innovation fueled by funding and nurtured by experience and practical assistance on the ground can grow to energize entire communities.

The impact of such collaborations would vary along the broad lines that form the work of the Jewish family service agency in its community. Currently, these agencies are deep in the midst of navigating the changing health care landscape, considering the best ways to maintain patient security as clinical data travels electronically. Agencies are studying best practices in serving clients on the autism spectrum. They are serving those who face food insecurity and those fleeing from abusive conditions. And they are looking for ways to serve these clients that are sustainable, both in terms of funding and reducing their carbon footprint. While deep in the trenches of this reality, Jewish family service agencies are forward thinking enough to welcome the opportunity to collaborate with innovators who may have great ideas to address some of these pressing needs.

CONCLUSION

The start-up organizations of the 19th and early 20th centuries are some of today's major Jewish family service agencies. Built on innovation, they continue to foster creative ideas to serve people in need and strengthen our communities. Jewish family service agencies have a culture built on the spirit of innovation and a recognition that good ideas need a sustainable and collaborative process to be transformed into meaningful programs and services. Today's innovators are creative, energetic, and working hard to develop new ways to meet some of our community's most pressing challenges. This is a natural partnership that has the potential to introduce valuable and novel solutions to fill some important voids. It is *beshert*. And its impact has the potential to lead the Jewish community solidly into our collective future.

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Spiritual Programming for Seniors in Geriatric Centers

Rabbi Michael ***Wolff***

This article describes several spiritual care programs provided for residents at two Jewish long-term care facilities operated under the auspices of the provincial government of Quebec, Canada. It discusses the rationale for the programs, as well as the need to adapt them to the realities of long-term care.

In Quebec, all residents are referred for long-term care placement by the government. Montreal has three long-term care institutions with a Jewish cultural mandate, which includes the provision of kosher food, religious services, and religious programming. The programs presented here are offered at two of these facilities: the Donald Berman Maimonides Geriatric Center, which is home to 387 residents, of whom 350 are Jewish, and the Jewish Eldercare Center, where 280 out of the 320 residents are Jewish.

The decision to move to a long-term care facility is a difficult one. Most people move into such a facility because their health is deteriorating and home care services or supportive housing can no longer meet their care needs. Residents often suffer from multiple chronic diseases and therefore can no longer live independently. It is estimated that close to 80% of residents in long-term care suffer from some kind of dementia. As the primary caregiver, the family tends to be the ones requesting the move.

Residents placed in a Canadian government institution require a minimum of 3 hours of nursing care per day. Both institutions described in this article are designed somewhat like hospitals as they provide on-site basic medical and nursing services. Although they strive to create a homelike atmosphere, they are not designed for independent living.

The residents live on units that have specific mandates covering the spectrum of types of care required. One unit is devoted to residents requiring physical care but with no or mild cognitive impairment, whereas another is geared toward residents requiring light physical care but with severe behavioral dysfunctions. In addition, both Donald Berman Maimonides and the Jewish Eldercare are committed to providing "*More than Care*" to their residents, which extends the focus beyond the fundamentals of high-quality clinical care and state-of-the-art therapeutic services to quality of life elements that focus on healing and nurturing the body, mind, and spirit.

ADAPTING RELIGIOUS PROGRAMMING TO THE REALITIES OF LONG-TERM CARE

Chaplains know that "presence and listening" are the essence of spiritual care (Friedman, p. 60). According to Rabbi Dayle Friedman, the role of the chaplain

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is to provide spiritual accompaniment within a relationship established between the chaplain and the resident (client) (pp. xi–xii). *Spiritual accompaniment* enables residents to find a coping mechanism or support for their current situation through their own belief systems. The chaplain accomplishes this process by engaging the resident either in conversation or through programming that will, it is hoped, elicit the emotional support mechanisms that the resident seeks.

Most forms of pastoral care are predicated on a relationship in which both parties can verbally communicate with each other. Applying the chaplaincy concept of spiritual accompaniment to residents who cannot engage in dialogue because of mental or physical impairments obviously will be different from the typical form of chaplaincy. By necessity, the chaplain has to use other methods to reach out to and establish a relationship that provides spiritual support. Through programming grounded in sensory and emotional stimuli, the chaplain is able to reach out to those residents who are unable to verbally express themselves as well as provide spiritual support to a larger population.

Although provided in a Jewish context, these programs need to be both nonthreatening and not geared to impose a specific religious viewpoint. In this way the programming allows the residents to find their own meaning without having a specific belief system imposed on them. One should never assume that everyone shares the same belief systems.

PROGRAM GOALS

In an article entitled "Torah Study in Long-Term Care," Rabbi David Glicksman (2009, p. 165) identifies the following goals for religious/spiritual programs in long-term care facilities:

- To create a program in which people will choose to participate
- To make the program meaningful for each individual
- To allow participants to feel good about the program and their participation
- To help participants become more aware of their Jewish identities
- To ensure that feelings remain once the program ends

Building on these core principles, additional goals of the religious programming at Donald Berman Maimonides and Eldercare are as follows:

- To increase individual self-esteem and self-worth
- To provide a venue that enables the individual to feel at ease
- To foster a sense of belongingness to the center's community
- To inspire residents to resolve or address issues that trouble them without imposing on their privacy by revealing those issues in front of other residents
- To provide answers to spiritual problems in situations when counseling cannot be explicitly sought

SPIRITUAL CARE PROGRAMS

Chanukat Habayit / Welcome Ritual

After they come to live in the facility, all newly admitted residents are welcomed with a ceremony performed in their room. This ceremony is not conducted immediately after arrival, but generally 4–6 weeks after admission, which provides the time for the residents to become habituated to their new environment and more accepting of the change in lifestyle. This *Chanukat Habayit* or "Dedication

of the House" ceremony is conducted for all residents, Jewish and non-Jewish, cognitively intact or not. It provides residents with individual attention and serves to increase their self-worth. Further, the ceremony serves a second purpose—allowing the staff and chaplain to meet the resident and to relate to him or her as a person rather than as a client.

These greeting ceremonies are scheduled once a week, with usually four done within a 90-minute period. Each "welcome" lasts approximately 20 minutes. Invitations are sent to the resident and family members, and additional guests are always encouraged to come. Also attending the ceremony are the chaplain, representatives from the Auxiliary and volunteer departments, and staff members from the nursing, rehabilitation, social services, and therapeutic recreation departments. As in a traditional housewarming party, refreshments are served and guests bring gifts. Residents are presented with a beautiful flowering plant as well as a welcome basket containing personal essentials.

The program begins with a blessing over wine (or grape juice), a blessing of the room, and often a prayer for good health. A designated staff person or auxiliary volunteer then makes a short welcome speech, after which refreshments are served and gifts are presented. Residents and their family are also given the opportunity to say something to their guests. People then socialize and interesting stories are exchanged.

The personal attention and social atmosphere allow the resident to feel validated, included, and recognized. This ceremony also helps the residents and families come to terms with the fact that they have moved to a new home and that a new phase of life has begun. Giving residents the opportunity to meet and socialize informally with staff aids them in fostering relationships with the people who care for them and with whom they interact on a daily basis.

The reaction to the *Chanukat Habayit* ceremonies has been overwhelmingly positive. Generally, families, particularly the adult children, try to attend. The residents, even those with cognitive impairments, become transformed into gracious hosts, socializing, smiling, and simply enjoying the moment.

When planning the implementation of this program, one should work with a committee to gain the proper buy-in from all departments involved. At both the Montreal facilities, a committee of representatives from the social work, nursing, rehabilitation therapy, recreational therapy, and chaplaincy departments created and prepared this program. The committee determined which staff members and departments would be involved, as well as the logistical requirements for running the program efficiently, such as scheduling, notification of residents and families, volunteer involvement, and the provision of welcome gifts.

The personal attention and social atmosphere allow the resident to feel validated, included, and recognized.

Healing Service

The purpose of a Healing Service is to provide a sense of hope and support to residents and to relieve the grief of illness. The service consists of generic prayers, readings, and songs with a focus on spiritual peace, healing, and recovery. The Healing Service was not designed as a substitute for regular morning or evening prayer services, and it does not include ritual prayers found in those services. In this way the Healing Service stands as its own ritual. Many residents who do not attend synagogue services attend the Healing Service.

Services are led by the chaplain and a music therapist; each unit has the exact same healing service program and it occurs once a month on each unit. The

only exceptions are the Alzheimer's and critical care units, whose residents do not respond to this type of service. Following the same service month after month enables residents to become accustomed to its pattern, as well as to learn and recognize the readings, songs, and prayers. Because the melodies and songs are familiar, the residents participate in an engaged manner and sing along.

Healing Service participants use it as a time to relax and find inner calmness, as well as an opportunity to reflect on their pains and illnesses. Most importantly, the Healing Service functions as a coping mechanism for residents, even for those who are not cognitively intact. Residents are able to find peace through the music and cadence of the readings.

Reading Club

The purpose of the reading club is to generate discussion in a nonthreatening group setting that, ideally, should enable residents to address personal issues. The use of a text provides a distancing that allows participants to think about and discuss personal issues without having to disclose details of their private lives.

Although most long-term care centers have discussion groups, the focus of this program is different: The group functions as a discussion/literature forum and not as a "talk" with the rabbi. Unlike much of the other spiritual programming, the Reading Club is geared toward cognitively intact residents. It requires that the facilitator have a good knowledge of the reading material available, be open to questions and comments of the participants, refrain from imposing his or her own point of view, and be nonjudgmental.

Because some of the residents have low vision, the facilitator reads aloud a book, short story, or article and then poses probing questions. Discussions ensue and the residents decide what they wish to read at the next meeting. Topics covered have included spirituality, belief in God, finding meaning in suffering, faith, questioning, and acceptance. The Reading Club has read essays and books by Harold Kushner, Joseph Telushkin, Jonathan Sacks, and Victor Frankl in addition to short stories by Shalom Aleichem, I. L. Peretz, and Isaac Bashevis Singer.

The chaplain's role is to accompany and assist residents on their journey of aging by helping them find meaning in their daily lives within the institution.

CONCLUSION

Rabbi Dayle Friedman (2010, p. 288) writes that "aging is a time of opportunity and also of great spiritual challenge." The long-term care chaplain's role is to accompany and assist residents on their journey of aging by helping them find meaning in their daily lives within the institution. The chaplain helps them resolve life issues and attain some sense of contentment and peace. Programming adapted to the needs of long-term care residents provides an approach to spiritual accompaniment that works with people who cannot engage in a one-to-one setting or who lack the cognitive skills to communicate. At the same time, it counteracts disconnectedness while fostering self-esteem and a sense of belongingness and of meaning.

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Madrichim Narratives: The Next "Big" Idea for Supporting Jewish Education

In advance of its October 2012 meeting, the Jim Joseph Foundation Board of Directors invited a small group of community thought leaders to serve as *madrichim* (guides) and to submit a *madrich narrative* addressing the following question: **What "big idea" for supporting Jewish education would you propose the Jim Joseph Foundation fund?**

Versions of the following papers were presented by their authors at the board meeting and were the basis for a forward-looking, thought-provoking conversation among the board members, the *madrichim*, and a select group of Jewish community lay leaders. The board first conducted this activity as part of its August 2006 retreat, held shortly after the foundation's inception. Just as those *madrich narratives* continue to inform the foundation's strategy, so too will these ideas help guide the board in future grantmaking decisions.

The Jim Joseph Foundation is pleased to share these papers and continue this important conversation with readers of the *Journal of Jewish Communal Service*.

Make Our Garden Grow: Building Leadership Ecosystems

Rabbi Marc ***Baker***
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That Jewish education is experiencing a "leadership crisis" is a well-accepted mantra in the field and beyond. According to Jerry Silverman, president and CEO of Jewish Federations of North America, in the next decade or so, 70–80% of the executive positions in Jewish organizations will turn over, and "there is no bench." This year four of the largest, most successful, well-respected, well-funded Jewish community day schools in North America are all searching for new Heads of School—*at the same time*!

As I see it, the leadership crisis in Jewish education boils down to three essential challenges:

1. We are not recruiting enough talented and passionate people with leadership and management capacities at any stage of their careers.
2. We are not fully cultivating or developing the potential leaders and managers who are currently in our educational institutions to successfully generate a healthy pipeline of leadership at every level.
3. We are not nurturing or sustaining the people who currently serve in senior leadership positions to maximize their potential and longevity.

Foundations including the Jim Joseph Foundation (JJF) have commissioned studies and worked with universities and other organizations to create professional development programs for leaders and teachers in day schools, camps,

and supplementary schools. Many of these efforts ought to be expanded and replicated. These foundations should continue to research, evaluate, learn from, and invest in these and other programs and increase the numbers of leaders and potential leaders who benefit from them.

Yet it is time to go beyond leadership development programs. Solving the leadership crisis involves more than training and recruitment, both of which are essential. There is untapped potential waiting to be realized in people who are currently working in our educational institutions and in those who have not yet realized that their calling is to become a Jewish educational leader. We can realize this potential if we *turn our Jewish educational institutions into ecosystems for leadership learning and growth*.

Leadership is contextual, and like the best professional development for teachers, leadership development needs to focus on the context—the entire system— in which leadership occurs. Too often, for example, leadership development programs that take people out of their own institutions magnify their frustration, because the institutions they are to lead are inhospitable to the skills and capacities they are developing and to the leadership they might provide, let alone to their continued growth and professional fulfillment.

JJF can lead the field in taking a broader, deeper, whole-system view of what it will take to create environments where Jewish leaders and Jewish leadership will flourish in both theory and practice. We need this whole-system approach toward individual institutions and toward Jewish education more broadly.

My "big idea" is the cultivation of leadership ecosystems, or "learning organization" centers of excellence, where the commitment to providing outstanding and transformative learning experiences for young Jews is matched (and fueled) by a parallel commitment to developing outstanding, reflective, creative, collaborative, educational leaders and managers. Each ecosystem would develop its own internal leadership pipelines, explicitly aspiring to recruit and develop leaders who will either rise up the ranks of its own institution or, more likely, move on to leadership roles in other institutions. Over the next 5–10 years, these new leaders will become "gardeners" of new ecosystems, building the capacities of leaders and institutions across the field of Jewish education.

My "big idea" is the cultivation of leadership ecosystems, or "learning organization" centers of excellence.

Some of the defining elements of these leadership ecosystems are the following:

- *A culture of learning, growth, and reflective practice*, in which there are shared beliefs that leaders can learn to lead just as great teachers can learn to teach; budgets that prioritize professional development, growth, and renewal; coaching and mentoring as normative practices throughout the organization; use of case studies, "after action reviews," and other modalities that support leaders' collaborative inquiry into their work; leaders and managers who have the time and the resources to prioritize hiring, supervision; and evaluation
- *A strategic, high-performing board and professional leadership team* made up of the appropriate number of senior and mid-level leaders whose skills and capacities complement one another and match the strategic objectives of the educational institution; competitive salaries for senior leaders in addition to heads and executive directors; and a board trained in governance, committed to reflecting on its practices and building its own culture of leadership development (Baker, 2012)

- *Passionate, knowledgeable, and committed Jewish leading and learning* with a clear vision and shared understanding of the Jewish educational mission of the institution and how purposeful Jewish living and learning inform the strategy, decision making, and overall leadership and management culture and practice[1]
- A well-developed conception of *"followership"* as critical for the success of leaders and managers; a clear understanding on the part of all stakeholders of their role in supporting and "authorizing" their leaders to lead
- *Stable annual budgets to help avoid reactive, short-term leadership*, with resources supporting the annual budget and educational programs so leaders can think creatively and strategically beyond the immediate financial demands of tomorrow; endowments and multi-year programmatic support that allow for the allocation of time and resources to leadership development and institutional capacity building
- *Aggressive recruitment and development of new talent,* yielding a steady stream of early-career professionals with leadership and management potential on both the educational and non-educational sides of the institution; funding for creative job opportunities such as internships and "residencies" to make space for these "new recruits" in the institution; effective hiring and performance management practices; the expectation that some early-career leaders will move on to lead in other institutions
- *Collaborative partnerships* with university schools of education and Jewish studies, business schools, foundations, and leadership development programs to conduct research, evaluation, and documentation of leadership models, programs, and initiatives, including successes and failures, from which other schools will learn
- *Increased thought leadership by and collaboration between local, national, and international Jewish educational leaders,* leading to more well-developed theories, or mental models, of what Jewish educational leadership means; moving the discourse beyond one of survival and continuity (of our institutions or of Judaism) to a more creative, strategic visioning about the future of Judaism, the Jewish community, and Jewish education

If our Jewish educational institutions are to survive and thrive into the next generation, *we need to dramatically increase the numbers of Jewish educational leaders* who have the *vision and creativity* to inspire, evolve, and adapt; the *management skills* to build institutional capacity, strategize, and translate mission and vision into practice; and the *passion for Jewish learning and living* to ensure that the communities and educational institutions they lead are deeply rooted in and draw inspiration from the vision of Judaism toward which they are educating. Turning our Jewish educational institutions into leadership ecosystems is the only way we will achieve this. *Changing the face of Jewish educational leadership will strengthen individual institutions and, as a natural outgrowth, will make our garden—the field of Jewish education—blossom and grow.*

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[1] My ELI Talk entitled "Jewish Educational Leadership with Soul" attempted to illustrate one approach to what I called Jewishly or religiously purposeful leadership: available at http://elitalks.org/video/marc-baker.

Inspiration. Cultivation. Reverberation.

Training Community Leaders to Change the Game

Rabbi Sharon ***Brous***
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A few years ago I visited the Sheba Medical Center outside of Tel Aviv, which houses one of the world's leading medical simulation research centers. Medical professionals from around the world come to the center to learn from the greatest doctors, surgeons, and medical ethicists *how to fail*. In a controlled environment, technicians and teachers create scenarios in which challenging elements intensify until new doctors inevitably slip up. The objective: to add enough stressors that young doctors forget to bring along a back-up oxygen tank while rushing patients in distress through the hospital corridor. Or neglect to properly dislodge the IV. Why? If it happens only once in a simulation exercise and the subject flatlines, you can be certain that doctor will never again forget an oxygen tank. With careful mentorship, every mistake brings the opportunity for growth and learning.

This model has been on my mind as I contemplate what might help ensure a Jewish future that is bold, dynamic, enlivened, and compelling. First, a few observations:

With careful mentorship, every mistake brings the opportunity for growth and learning.

- *Diminishing affiliation is an unquestionable trend in the American Jewish community.* Fewer young Jews associate with or pay dues to be a part of conventional Jewish establishments. A cursory analysis of the regulars in non-Orthodox synagogue communities around the country substantiates the statistical evidence. The organized Jewish world is graying. Young people (Gen Y, Millennials) speak about feeling a deep sense of alienation and disconnect from organized religion and institutional Jewish life (Greenberg, 2005), which they perceive to be driven by an ideology and agenda a half-century past their prime and by an approach that, despite rhetoric of a willingness to change, is stuck in a steadfast commitment to doing things as they have always been done. (Try moving Shabbat services an hour earlier if you want to see the full capacity for outrage among the children of Israel, particularly those who sit on synagogue ritual committees.)
- Despite diminishing interest and affiliation, *there has been, over the past decade, a simultaneous burst of innovation* manifesting itself in creative communities, organizations, and programs that reflect what many consider a renaissance in Jewish life. These initiatives are often driven by young people and characterized by a language that not only entices but also inspires and empowers them. Those same folks who bristle at the idea of conventional Jewish engagement are eagerly signing up and lining up to engage in Jewish creative, artistic, political, intellectual, and even spiritual endeavors. In our experience over the past eight years in building IKAR—a community of predominantly young, unaffiliated Jews—we have found that imaginative approaches to community, ritual, and learning are surprisingly effective in engaging the disengaged.

My strong sense is that the key to reaching even the most cynical and disconnected American Jews is strong, visionary leadership—demonstrated by rabbis, educators, and community leaders who, while honoring the tradition, are willing to challenge or sidestep the status quo to make space for something new. It is a leadership driven by moral courage and a commitment to manifesting core Jewish values—including social responsibility, compassion, equality, and dignity—in our communities and in our world.

We know that great leadership is hard to come by. We also know that there is a definitionally conservative impulse that permeates most Jewish institutions—so that even the most earnest young rabbis struggle to resist the tug of the status quo once they leave seminary and enter communities of practice. That is why we only infrequently witness real shifts in the landscape of the American Jewish community. And yet there have been a few rabbinic leaders who, over the course of the past several decades, have changed the game: one whose vision and inexhaustible spirit led him to build a world-class cultural center that has become a defining Jewish landmark in Los Angeles; those who reanimate the most burdened and banal of Jewish institutions, the synagogue, making their Upper West Side sanctuary a veritable tourist site for those looking to believe again in the relevance of prayer and spirit; another one who fearlessly reshapes the course of American Orthodoxy. These are the rabbinic game-changers of the last 30 years, people whose voices and vision have changed the American Jewish conversation.

How do we create an environment that fosters and encourages that kind of creativity and boldness in a new generation of leaders? Here I urge us to take a page out of the medical simulation lab book: The best way to support bold, imaginative leadership in the Jewish community today is apprenticeship/ fellowship/intensive mentorship. One of my colleagues, a rabbi and psychiatrist, likes to point out that the rabbinate is the only service profession in which there is not a built-in safe space for mentorship, reflection, and sharing of best practices.

A good deal of research has been done over the past decade on the transition from seminary to pulpit made by Christian ministers. The prevailing theory is that even the best seminary training ought to be supplemented by focused mentorship programs that prepare freshly minted practitioners to cross the threshold and become communal leaders, in a position to touch hearts and minds and shape the future of the religious community (Wind & Wood, 2008).

This is, of course, no less the case for rabbis than for ministers. During my orientation to rabbinical school, a tired retired rabbi came to address our class: "You're no smarter than we were," he said. "You're no more ambitious, and frankly no better looking than we were. We failed. What are you going to do differently?"

After 11 years in a rabbinate that was shaped indelibly by a powerful mentorship experience, I am more certain than ever that **great mentorship not only paves the way for a smarter, healthier rabbinate but is also the best way to ensure the continued relevance of Judaism to a rapidly changing population that feels increasingly alienated from conventional, institutional forms of Jewish expression and communal engagement**. Formal rabbinic education is central to the growth and development of a new rabbi, but there is a limit to the ability of a seminary to cultivate the dreams of young rabbinical students. Many

rabbis note that their most important growth occurred outside the classroom in individual mentorship relationships, in which their visions for the Jewish future were supported and fueled.

Excellent mentorship of dynamic and promising young rabbis, in a space where it is safe to experiment and fail, to reflect and reimagine, to dream and to grow, is itself a game-changer in the American Jewish communal experience. And it ought to be funded, supported, and studied.

As IKAR has grown, nearly every foundation executive we have spoken with has asked us about how to replicate its success. "How can you bring this revitalized Jewish communal experience to scale?" "Can we franchise IKAR?" we are asked. But our sense is that, although certain models become impactful through replication, **others become impactful through *reverberation***. In a multifaceted approach that works to develop paths to cultural, intellectual, and spiritual engagement, the key is not to apply the formula and hit "repeat," but rather to identify extraordinary young leaders, each of whom has the potential to learn deeply and contribute to a ripple effect through his or her own voice and own distinct vision.

My rabbinic fellowship at B'nai Jeshurun (BJ) on New York's Upper West Side, with intensive mentoring from Rabbis Roly Matalon and Marcelo Bronstein, transformed my rabbinate. And yet when we set out to build IKAR, I was not trying to build another BJ. My interest was to take the core values and principles I had learned from my mentors, which they had learned from theirs (Marshall Meyer) and which he had learned from his (Abraham Joshua Heschel) and to translate them into an idiom that would resonate for a demographic of Jews who lived in a time and place with its own challenges and opportunities. At BJ I learned the values of both sincere rootedness in the Jewish tradition and radical inclusivity. I learned the power of an intensive spiritual practice to motivate and mobilize a community to work toward social change. I learned the importance of building a culture of risk-taking and change, even when everything is working. And I learned the necessity of spiritual partnership at the heart of spiritual community. But as a rabbinic fellow at BJ I worked to manifest each of those core values in a way that spoke both to my own rabbinic vision and to a disparate population of disaffected, urban 21st-century Jews. In other words, the greatest gift that good mentorship gives a person is the ability to become the best version of him- or herself. As a fellow at BJ, I also experienced a few critical *oxygen tank* moments, which left such a profound imprint that I continue to draw on them regularly even a decade later.

The greatest gift that good mentorship gives a person is the ability to become the best version of him- or herself.

Thus the case for rabbinic fellowships: intensive, individualized apprenticeship opportunities for rabbis, complementing their formal rabbinic training. The objective is to build *relationships* and create safe *space* within which young rabbis learn, experiment, fail, imagine, and reimagine; are mentored by exceptional teachers; and go out with a commitment to using personal strengths and honed vision to take bold steps to revitalize Jewish life.

IKAR has just completed its own two-year pilot rabbinic fellowship program, funded by the Charles H. Revson Foundation. Our first fellow trained through this program left IKAR to found a vibrant new spiritual outreach project in Chicago designed to serve young Jewish adults, most of whom were formerly disengaged. It is now already regularly attracting hundreds of young Jews to

Shabbat services and other creative programs; more than 450 people sang and danced their way through the High Holy Days. Our second fellow went on to run one of the largest conversion programs in the country. He was hired to take an innovative model of adult learning that he explored as an IKAR fellow and use it to transform the way that we welcome, educate, and engage Jews and future Jews. In just two years, we have seen how dedicated mentorship not only has had a transformative effect on the young rabbis it directly touches but also that the impact reverberates throughout the communities they go on to serve.

Rabbinic mentorship is a simple but big idea. Foundations could support it by strategically identifying a limited number of mentors and host communities—both emergent and established—that are vision driven, that model creativity and fluidity, that are open to experimentation, *and that have demonstrated an ability to engage young Jews, particularly those outside the fold*. Those mentors would be paired with a small number of exceptional rabbinical students chosen to participate in a two-year post-seminary training program that would include intensive mentorship and apprenticeship as well as national fellowship—including twice-yearly gatherings in which fellows would engage in leadership training and mentors and fellows would learn Torah together.

We live in a time of deep spiritual need, when many young Jews are searching for a sense of purpose; they are restless with the desire for an authentic connection with one another within some spiritual or religious framework. But the resistance, particularly among 20- and 30-somethings, to the world of institutional Judaism is something that must be addressed or we risk losing a generation of Jews to apathy and alienation. We must take seriously the idea of training leadership to respond to this population and this dynamic with creativity, optimism, and a sense of possibility. This generation offers new and different challenges, which call for new and different ways of thinking about Jewish and particularly rabbinic engagement. A national rabbinic fellowship would be instrumental in animating the vision at the center of the Jewish revitalization movement.

Those of us who believe that Judaism is a vital, compelling force must respond to the call of this generation by articulating a passionate, accessible, challenging, and compelling Jewish life. Rabbinic fellows are a powerful way to amplify the message to thousands and thousands of people through serious and sustained mentorship, leadership training, and spiritual strengthening. Together we can inspire the next generation of young rabbis to charge into the world with holy *chutzpah*—working to bring the spirit of innovation and possibility to the farthest reaches of the Jewish community.

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Working in a Relational Way

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"Connected people tend to have an effect on one another" (Kadushin, 2011).
"Increased cooperation for greater accumulation effects requires revising traditional self-centered attitudes about impact and how to get it" (Lobman & Bacchetti, 2006).
"I can imagine a system embracing ongoing, positive partnerships, among funders, among nonprofits and between them. They would work together under open, *mutually* agreed-upon and adaptable rules. The rules would be geared toward producing successful outcomes by sharing useful information, by learning together, by treating each other respectfully, by encouraging and using feedback, and by leveraging resources from all the sectors" (Skloot, 2007).

As the Jim Joseph Foundation's founding executive director since its inception in 2006, I have learned that it and similar foundations can best realize their potential by developing a *dynamic, relational approach to grantmaking.*

Let me begin with the obvious observation that the world is changing at mind-bending speed. The confluence of the internet, social media, and mobile technologies fuels unprecedented forms of globalization. People are connected to and with one another in ways never before possible. Information is transmitted and received faster and in more ways than ever before.

Against this backdrop, the state of the Jewish community is in flux. Depending on your perspective, the Jewish experience today lies somewhere between being members of a tribe plagued in modern times by denominational factionalism whose extinction as a people is a demographic inevitability, to being a flourishing, diverse peoplehood whose creative renewal of customs and traditions and unabated chain of extraordinary achievements in all fields of human endeavor presage a vibrant Jewish future.

Foundations can best realize their potential by developing a dynamic, relational approach to grantmaking.

What is not at issue is the centrality of Jewish education, support of which is the raison d'etre of the Jim Joseph Foundation. The Jewish people value education and cherish life-long learning.

The interplay of accelerating global interdependencies, decentralization of authority, the democratization of knowledge, and peer networking leads me to propose my "big idea" for the Jim Joseph Foundation: The foundation and its grantees, as well as its technical assistance providers and funding partners, must come together in much more highly interactive, problem-solving, knowledge-producing ways.

We have worked diligently to develop an approach to philanthropy that places a premium on shared responsibility for the success of every major grant. Optimally, this responsibility is owned by the grantee *and* the funder *and,* in cases where they participate, independent experts (e.g., evaluators, strategic planning consultants, business planners). This shared responsibility can happen only when learning is at the core of the enterprise.

This evolving approach to grantmaking offers more substantive opportunities for engagement and learning than the more commonly practiced transactional philanthropy, which I have long believed can impede effectiveness: It tends to

perpetuate a counterproductive funder/grantee power imbalance, mitigates against long-term investment in worthy projects, and deprives the field of crucial lessons learned.

I recognize the challenge here is to not set up traditional grantmaking as a straw man. The conventional grantmaking cycle of letters of inquiry, proposal submission, review of proposals by professional staff, board review, transmission of grant award letters, and subsequent grant payments on a fixed schedule has produced some remarkable results.

It is worth noting, however, that this grantmaking is typically conducted as a series of formal, written transactions that characteristically do not engender deep levels of funder-grantee interdependence. Nor does this process often enable the frequency of interpersonal communication that engenders trust. Not much energy is directed to relationship building, nor do funders and grantees devote a great deal of time to learning together. Project evaluators are rarely involved in discussions with the grantee and funder to analyze progress being made toward desired project outcomes. The cost of *non-learning* is unknown to all.

In the transactional model, the consequence for grantees that perform poorly is loss of funding and the capital that help them conduct their business. For the funder, the outcome of a grant made to an underperforming grantee typically has no adverse effect whatsoever.

Former Surdna Foundation CEO Ed Skloot describes conventional philanthropy as "discrete transactions made in a linear fashion...mechanistic, transactional, and isolating." Skloot suggests new ways for foundations to work, acting as "information resources brokers, learners and listeners, and promoters of success." And no less a public figure than Howard Warren Buffet asks, "How can we take an active role catalyzing...foundations and nonprofits to come together to... leverage up their resources so they can accomplish more?"

The Jim Joseph Foundation is continuously experimenting with meaningful ways to engage not only with grantees but also with evaluators, technical assistance experts, and other foundations. We are pursuing myriad configurations of stakeholders in problem-solving conversations both to hone our critical thinking and to expand the network of resources we bring to our work as well as to that of our grantees. The goal is ultimately to improve the effectiveness of our philanthropy.

Real trust-building among stakeholders produces an accelerated pace of project implementation and enhanced performance of all involved.

I do not want this big idea to feel "soft." I envision a substantial role for the Jim Joseph Foundation: to be one of several main actors devoted to creating strong, trusting relationships around various major Jewish education initiatives. In my experience, real trust-building among stakeholders produces an accelerated pace of project implementation and enhanced performance of all involved. In this arena, funders, grantees, evaluators, and consultants alike would align around common, consensually agreed-upon goals—both for the projects themselves and for field-related knowledge creation and dissemination. Grantees' transparent sharing—of progress made and challenges encountered—in ongoing conversations with foundation and evaluation personnel would lead to real-time learning. Foundations in turn would become "conduits of the nonprofits' knowledge" to the field of Jewish education in what becomes "effectively, a two-way distribution system" (Ellsworth & Lumarda, 2003).

To demonstrate one example of relational philanthropy, let me conclude with an example of a future activity that could be undertaken by the Jim Joseph Foundation.

We currently fund several grantees whose beneficiaries are young, "emerging" adults. We have a number of evaluation studies that have yielded fascinating findings on how this cohort lives—and learns—Jewishly. We are at a point where a "cluster" evaluation of a number of grants for this cohort seems to be in order.

To conduct such an evaluation, we would bring together representatives of the following: every grantee that has received Jim Joseph Foundation grant support for programs for emerging adults; the projects' evaluators; and other foundations that have an interest in this cohort's characteristics, beliefs, and Jewish practices. We would likely add to the mix a scholar(s) whose expertise in young adult identity development would enrich the conversation. Together, we would explore topics of shared interest, with the goal of analyzing aspects of the young adult Jewish experience common across all the grantees' work.

The philanthropic practice is one of active listening, networking, and sharing information in reciprocal exchanges of knowledge (Skloot, 2007). In this scenario, trust among all the participants would be paramount. Everyone involved would contribute to an effort designed to generate knowledge that all would agree is important. Participants would interact with one another in a common pursuit to build skills and, ultimately, to produce a study for dissemination that would enhance the work of all those for whom the findings are relevant.

For whatever major grants the Jim Joseph Foundation awards in the future, I believe that this *community structure of knowledge production*, enabling the foundation and all its stakeholders to interact with one another in *relational contexts* (McFarland & Klopfer, 2010), is the most direct route to enhanced philanthropic effectiveness and positive impact on the world of Jewish education.

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Introducing More Jewish Human Beings to the Conversation in Word and Deed About the Covenant

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I made the mistake, before sitting down to gather my thoughts for this presentation, of reading the ideas that I shared at a parallel retreat that the Jim Joseph Foundation Board held with *madrichim* six years ago. It was an honor to be included then, as I had just completed my stint as a Stanford professor and was looking forward to the move to the Jewish Theological Seminary (JTS); it is a still greater honor to be included again, as I enter my sixth year of work with faculty and staff on the often humbling effort to translate my convictions about Judaism, Jewish education, and the Jewish community into institutional programs, priorities, and budgets. My problem with what I wrote in 2006 is not that my analysis was wrong. I believe in all humility that my descriptions of "the modern Jewish situation" and "the challenges we face now" were on target. The "modest" proposal I put forward then for transforming congregational schools from top to bottom will soon be declared a major pillar of my JTS agenda for the next five years.

The problem is the opposite: Everything that seemed true to me about our community in 2006 seems all the more true in 2012. What seemed important then seems urgent today. Things have moved even faster than any of us could have predicted, and not only in the area of technology. Despite significant advances in Jewish education during this period, the direction in which many things are moving is not positive. Yet we must never forget that great opportunities beckon right now through windows that soon may close. My analysis in 2006, therefore, strikes me in hindsight as not far-reaching enough. My proposals for change were in several key respects insufficiently radical.

Despite significant advances in Jewish education during this period, the direction in which many things are moving is not positive.

This thought piece bears the imprint of the satisfactions and frustrations of the five years I have spent leading JTS. It has been shaped as well by several recent developments: the population study of New York Jewry released in 2012; an American Jewish Committee consultation held in 2011 about the continuing (and perhaps growing) divide between Israeli and American Jews that especially affects younger members of our community; my steep learning curve over the last 18 months about the technological revolution sweeping higher (and other) education; and, perhaps most important, my felt need—as the leader of JTS and one of the leaders of Conservative Judaism and of the wider swath of Jews that I call the "Vital Religious Center"—to be utterly clear on what I truly believe about Judaism and the Jewish people and to articulate those convictions as widely as possible. I therefore begin this essay from core commitments (rather than with a survey of the contemporary situation in Jewish education) and work outward. In the 2006 document I called this personal center of gravity *Torah*. Here I call it *covenant*.

On the Shabbat before Rosh Hashanah, we read Parashat *Nitzavim* as a lead-up to the High Holy Days. Moses gives the climactic speech of his life to the Children of Israel in a way that I believe addresses me, and all of us, directly. "You

are standing here this day," he says—and he is correct: We are standing here, if we elect to place ourselves among his audience. I feel included in his second-person plural "you." Moses at once emphasizes just how inclusive this group is, encompassing "even the stranger within your camp." The covenant is made "both with those who are standing here this day before the Lord…and with those who are not with us here this day." I feel these words viscerally. I believe that when you or I take on the responsibilities of this covenant as a contemporary Jew, *however we choose to do so*, our ancestors stand with us. If we live Judaism actively, we live with the generations by our side—and in a real sense we also live *for* them.

It goes without saying that Jews of past generations might not recognize their Jewish way in ours. My Dad never touched a computer keyboard, let alone a smartphone. His father, who worked as a tailor, lacked extensive Jewish *or* general education. Their ways of living Judaism were very different from one another and cannot possibly be the same as mine. And yet they are! I know for certain that substantial continuity connects them with me—especially at holidays—and I know too that I live Judaism for and with my descendants. All of us do. Someday in the distant future Jews of multiple varieties will live Judaism with and for *us*.

My ability to take on this gift with a full heart, joyfully, holding nothing back, sacrificing nothing of my modern American self to Judaism, but rather bringing all I have and all I am to the task of covenant, is heightened by three further assurances that Moses provides in Parashat *Nitzavim*:

1. Much that we would dearly love to know about life, death, and the future is "concealed." We will never know it. No theology or system will ever prove adequate. But the "revealed things" are sufficient for us and our children to *do* what is needed. We can make the world more just and compassionate, as the covenant requires. We have enough to go on, in both senses.

2. The wisdom we require is not in heaven, not across the sea, but here, close, in our mouth and heart. We have what we need: a wonderfully expansive tradition; the use of all human faculties and the gifts of science and culture they have produced over the centuries; the help of one another and the sum total of our diverse experiences and wisdom; the help of God, always imperfectly and variously understood.

3. We can figure out what we need to do and can do it, with some success; we can and do choose life, choose good, and choose blessing. That agenda is not captured by the word "religion," but it is certainly not "secular."

Five action principles for Jewish educational flow directly from this statement of core convictions. I outline them here and attach each to one key element of transformed practice.

The existence of Jews committed to the task of carrying on the covenant remains urgently important for the world as well as for Judaism. Every Jew matters. This means that our educational net should be cast as widely as possible. We should not address only "core Jews," even as we continue to serve the needs of that essential set of partners and leaders in the conversation. We should try to meet a broad array of Jews where they are and help them pursue differing paths of covenant that bind them, as the original does, to one another and to the world, as well as to God/The Ultimate/Transcendence. The New York population study, which revealed huge growth among Haredim and a shrinking

percentage of non-Orthodox Jews, also highlighted the wide diversity of the city's Jewry. This variety on the one hand makes it impossible to reach all Jews with a single religious, cultural, or political message and on the other makes it more important than ever to reach across the growing Orthodox/non-Orthodox divide. Providing large numbers of Jews with diverse forms of Jewish education has become more complex and difficult with each passing year—and more necessary. This is arguably true in *many* sectors of life and many industries.

The fundamental task of Jewish education is to bring ever more Jewish men and women—especially in the period of adolescence and emerging adulthood when self-conceptions and key relationships are formed—into Jewish *conversation*, conducted across the ages in word and deed, about how to pursue the covenant. That is why I proposed in my recent op-ed piece in the *Wall Street Journal*, drawing on an earlier idea from Lee Shulman, that we develop a new sort of *daf yomi*—far broader in content, media, scope, and range of participants than the Orthodox original—that will link as many members and segments of the Jewish community as possible in daily learning and conversation. We want to create *experiences of meaning and community* that are shared as widely as can be and yet are as intimate as can be. New technology is very much our ally in pursuing this eternal covenantal task.

Moses' call addresses every Jew who is prepared to heed it, regardless of denomination, gender, or creed; indeed, it addresses every human being who is ready to listen and to cooperate with Jews in carrying out the task Moses sets forth. Jewish education needs to be equally universal in its scope and its conception of the self. We tend for obvious reasons—funding, mission, habit—to conceive of Jewish education as education of Jews about Judaism. It makes perfect sense, except that, outside of the Haredi world, few of us live as Jews only. We are not meant to live that way. The Torah wants *Jewish human beings* who engage as such with the world. The Jewish parts of us are not separate from the rest of who we are. I believe Jewish leaders have made a mistake in acceding to the modern Enlightenment division between "secular" and "religious," allowing these specious categories to define Jews and limit Jewish education. I would like to see educational programs that work to overcome that divide and offer curricular experiences that address multiple parts of the self. Link the study and practice of Jewish tradition to experience of tradition per se; for example, in the arts. Tie ritual observance to familiar disciplines such as sports and music lessons. Relate Torah and Talmud to personal and social ethics. Do this not as educational gimmicks but because *this is who we are and how we learn*. (Think of summer camps; see the Cohen-Kelman study on how young Jews want to experience Jewish culture.) In sum: Address Jewish human beings in every program, not Jews. The implications are far-reaching.

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Because nothing worthwhile is accomplished without effort, and no human achievement comes without study and practice, even the least knowledgeable Jew can understand that Jewish life too depends on learning. Substance is essential. And because a "Jewish human being" is who we are or want to be, rather than a hobby or career for which we prepare, Jewish education is not a component added to Jewish life, one among many things Jews do, but rather is its core. We have understood for some time that in contemporary North America, where all doors are open to Jews and few Jews

live in an exclusively Jewish world, Jewish education means *acculturation and socialization*—becoming part of the community and its conversation—rather than the acquisition of discrete skills and knowledge. However, substance is not the enemy of that wide-ranging effort at offering experiences of meaning and community: It is essential. New technologies are leading *every* form of education today to emphasize relationship, experience, and learning as tools for personal growth, thereby changing the nature of classrooms, libraries, textbooks, and professions. This shift should help us immensely.

The diversity of the Jewish community can prove a resource for Jewish life and a boon to Jewish education *if* we find a way to aim at substance and solidarity rather than at mere commonalty or unity. The goal should be cooperation and dialogue rather than uniformity, which is too often purchased at the expense of valuable differences. Jews, of course, cannot and will not agree on how to pursue the Covenant or, indeed, on who should be included in the group charged with doing so. This is a given. But if we take seriously the requirement that the Jewish people must exist and be vital ("*Am Yisrael Chai*"); if we agree on the impossibility of knowing the ultimate truth about God or God's will; and if we accept the mandate to bring passion, learning, and commitment to the choice for goodness and blessing, then it seems to me that our educational efforts should simultaneously pursue three tracks.

1. Preserve distinctions that matter. We should not all study or pray the same way. Denominational differences are well worth preserving. The whole is strengthened when the parts are vibrant.

2. Agree that the "default" position is cooperation. Whatever educational resources *can* be shared—including educational professionals, whether in day schools, synagogue schools, youth groups, or camps—*should* be shared. Do not assume that Orthodoxy must remain separate in all respects. The opposite is the case.

3. Commit ourselves to making sure that as many Jewish teens and young adults as possible learn about other kinds of Jews and how they see the world, preferably by knowing and working with them. (Sadly, I have no Haredi friends or colleagues.) We all need the challenges—and sense of shared Covenant—that other Jews bring to our taken-for-granted assumptions. In particular, we should try in the next few years to reach over the growing divides separating Israeli from North American Jews, Orthodox from non-Orthodox, and inmarried from intermarried. Interfaith partnerships provide a good model for linking Jews with Jews.

The Torah wants Jewish human beings who engage as such with the world. The Jewish parts of us are not separate from the rest of who we are.

CONCLUSION

I feel compelled to add, despite having already exceeded the recommended length of this thought piece, that I approach the tasks I have suggested with excitement rather than fear, with a keen sense of opportunity rather than of crisis, and most of all with gratitude for the chance to live Jewishly in this, the most fortunate Diaspora that Jews have ever known, standing alongside a reborn State of Israel. I am worried about Iranian nuclear weapons as I set down these thoughts, but I am *not* worried about the disappearance of the Jewish people or of Judaism, or even about an end to vibrant Jewish life in North America. We do not need to engage every single Jewish human being in the Covenant for it to

continue, though we are obliged to try. Instead, the issue is maintaining the critical mass needed to keep our institutions and communities vital. I, like you, feel an immense obligation to share the profundity and joy of Jewish living with more Jews, especially younger Jews. Being able to do so is a great gift.

Moses at the end of his life was not permitted to be optimistic about his people's future in the near-term. In contrast, I am optimistic, in large part because so many of us are engaged in an agenda for Jewish education that we have the will, the imagination, and the means to pursue devotedly.

Catalyzing Systemic Change in Jewish Life

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As a community, we often look for the next big idea—a proposal so dramatic it will create a paradigm shift that will have a positive impact on the trajectory of Jewish life. But as the visionary leader Charles Schusterman (z"l) frequently told us, there is nothing new under the sun. In considering the future of Jewish education, we would do well to keep this principle in mind.

Rather than seeking a new idea, Jewish funders—including the Jim Joseph Foundation (JJF), Charles and Lynn Schusterman Family Foundation, and many others—should ensure that the Jewish education ecosystem is robust and healthy enough to enable the investments we have already made and the big ideas we have seeded to take root and succeed.

This is not to say we should be complacent or unimaginative. Quite the contrary. Creative thinking and innovative approaches have a key role to play in the vital systemic change work that will allow our ideas to flourish, our reach to broaden, and our impact to endure. Yet now is the time to focus on reclaiming and reworking existing assets and repairing the system in which we are currently educating and shaping the identity of young Jews. As we have seen through Birthright Israel, even the greatest ideas will not reach their fullest potential when operating in a system ill equipped to support them.

Now is the time to focus on reclaiming and reworking existing assets and repairing the system in which we are currently educating and shaping the identity of young Jews.

Indeed, as funders committed to achieving profound and lasting impact in Jewish life, the onus is on all of us to move beyond programmatic grantmaking. It is time we work in the more challenging interstitial areas in which only our collective efforts can achieve large-scale change. Simply put, we have a responsibility to use our vast resources—human, financial, and otherwise—in ways others simply cannot and will not.

Catalytic philanthropy is built on the recognition that although grantmaking is important, changing systems is the most effective way to find solutions to entrenched communal and societal issues. JJF is well positioned to take a lead role in catalyzing systemic change in Jewish education, having already made game-changing investments, significantly increasing the number of high-quality formal and informal educational opportunities.

And so, my "big idea" for JJF is not a new one, but I believe it is the most important. It should reinvigorate the system in which young Jews are nurtured,

educated, and inspired to lead vibrant Jewish lives. Foundations can catalyze systemic change in a number of ways, and here are three in particular that JJF is well positioned to consider.

BRING INNOVATION INTO THE MAINSTREAM

Ideas that can regenerate a field or community often blossom outside of the system in which they are designed to operate. Far too many of these ideas never find their way into the mainstream where they can be adapted, replicated, and ultimately taken to scale.

So it is with Jewish life, particularly in the field of young adult education. Over the last decade, we have witnessed the phenomenon of the Birthright generation, in which hundreds of thousands of young Jews—many previously unengaged—are returning from this eye-opening experience with a connection to Israel, a sense of belonging to a global Jewish community, and a hunger for opportunities to channel their newfound excitement into meaningful Jewish lives.

As the existing Jewish institutions have struggled to effectively engage them, we have seen the explosive growth of the Jewish "innovation ecosystem," bolstered by new social networking technology and supported by incubator programs such as Bikkurim, Jewish New Media Innovation Fund, Joshua Venture, Present Tense, Reboot, and the ROI Community. This ecosystem has at its core young Jewish social entrepreneurs who are creating relevant Jewish experiences, programs, and networks, and inspiring their peers to participate.

The challenge now, however, is to bring innovators and interventions incubated outside of the community into the mainstream, where they have the potential to find more reliable sources of funding and reach many more young Jews. With its vast influence in Jewish education and strong credibility and connections in the innovation sector, JJF can be at the forefront of infusing the ideas and work of young Jewish innovators into schools, camps, youth groups, campuses, and communities where young people learn and grow.

By focusing on the nexus between peer-driven ideas and reach, resources, and scale, JJF can ensure that new talent and approaches continually reinforce and reignite their existing investments in broad-scale education programs. How might such ideas reimagine the possibilities of keeping hundreds of thousands of Birthright alumni actively engaged with Jewish life and with Israel? How might they help transform Limmud into an international movement linking young Jewish adults through diverse and dynamic Jewish discourse? How might they help foster new networks of young Jews empowered to shape Jewish learning according to their own interests and to create Jewish life in their own image?

A recent study from the Institute for Jewish and Community Research shows that Jewish foundations are committed to supporting both communal institutions and innovative programming. But it is not enough to fund each independently of the other. By actively facilitating interaction between and integration of these efforts to engage young Jewish adults, we can create one holistic system that empowers young Jews to be co-creators of a vibrant Jewish future.

DRIVE TOWARD COLLECTIVE IMPACT

Building a holistic system and fostering communal change require more than individual interventions working in isolation. They demand resources to fill the

gaps and link the silos between organizations and programs, allowing broad-scale cross-sector coordination, communication, and collaboration to take hold among them. We have seen the power of the collective impact approach in a variety of fields.

JJF should take the lead in bringing all of the key stakeholders—including practitioners, experts, advocates, and current and potential funders—to the table to collectively reorganize the Jewish education system around a common agenda and unified set of consistently measured outcomes.

In doing so, it could pioneer a model similar to that of Strive, a public education reform initiative in Cincinnati, in which 300 community leaders spanning the public, private, government, policy, and advocacy sectors have put aside individual agendas to adopt a collective approach to improving student achievement. Aligning their efforts, outcomes, and metrics across the educational continuum, they have improved student success in key areas, including high school graduation rates.

One area where this work is of urgent and immense importance is Israel education. As Israel's legitimacy and existence as a Jewish state have become increasingly threatened and the ties of young Jews to Israel as a central focus of Jewish identity and peoplehood have grown increasingly tenuous, we need all philanthropic and communal partners to focus on returning Israel to the heart of Jewish life and learning from the pre-collegiate level to the university and beyond.

While Israel education is now attracting the attention of key stakeholders in the community, the hard work of aligning resources, methods, and measurement around a shared vision remains. Our goal ought to be nothing short of ensuring that all young Jews, including hundreds of thousands of Birthright alumni, have the opportunity to learn about, appreciate, and support Israel as the Jewish homeland, a key ally of the United States, and a legitimate modern state contributing meaningfully to the betterment of our world.

JJF has already been at the vanguard of this work, and it should continue to lead in this area. At the pre-collegiate level, JJF partnered with the Schusterman Foundation to launch the iCenter, dedicated to reinventing Israel education and to creating a continuum of innovative, effective Israel experiences throughout the Jewish educational system. Its local work with BASIS, which brought together 11 day schools to focus on shared outcomes and collective impact, is ripe with potential to be replicated and scaled on a national level.

We need to build on what we have started, weaving together a network of programs and organizations that expand opportunities for young people to engage with and explore modern Israel, its rich history, diverse society, and fertile cultural landscape. And we need to focus on developing a multifaceted field of Israel studies, in which young people in high school, college, and beyond can learn about modern Israel with the thoughtfulness and intellectual rigor it deserves.

Pushing intensely on that lever can "unstick" the system and create a chain reaction of change. In the Jewish community, that lever is leadership.

PUSH ON A LEVER FOR CHANGE

One of the most potent ways to achieve impact is to look for the leverage point in the gears that drives the entire system and concentrate attention and resources there. Pushing intensely on that lever can "unstick" the system and create a chain reaction of change.

In the Jewish community, that lever is leadership. We are facing a leadership crisis in which many of our current executives are struggling to adapt to

21st-century needs, and there is a dearth of bold, effective leaders coming up in the ranks ready to take over the reins. Quality Jewish leaders are essential to creating compelling, enriching Jewish experiences for young people. The ripple effect is clear: Leaders galvanize the influencers and advocates who galvanize the masses of people, creating a virtuous cycle in which great leaders beget great programs that inspire more great leaders. Without strong leadership, the Jewish ecosystem will stagnate and our program investments will be for naught.

Only by investing mightily both in cultivating top leadership and in nurturing young talent will we ensure that our community is able to engage the next generation in meaningful Jewish life and learning. We need to take a two-pronged approach to this work. First, make careers in the Jewish community more attractive and offer professional development, trainings, mentoring, coaching, and peer networks that provide professionals with the skills, resources, and support they need to create change from within. Second, develop a leadership pipeline that invests in rising stars—both professional and lay—and recruits top secular and business leaders to deploy their talents in Jewish life, whether on short-term assignments or through meaningful career change.

Thinking expansively, JJF should help reinvent the schools of Jewish communal leadership that are failing or, better yet, create a fully accredited, degree-granting institution of higher learning for pursuing careers and leadership roles in Jewish life, ideally highly subsidized or tuition-free. Whether an independent initiative or a college within a larger university, such an enterprise can attract promising talent and help a new generation build skills, create networks, and prepare the next cohort of executive leadership.

CONCLUSION

Birthright generation. **I**srael education. **G**reat leadership. Our **BIG** idea is for JJF is to focus its human and financial capital on these three critical areas. By infusing innovation into the mainstream to better engage young Jewish adults, by forging a shared vision and healthy ecosystem for Jewish and Israel education, and by pushing on the lever of leadership, JJF can achieve broad-scale and enduring impact with its grantmaking and revitalize the education system responsible for nurturing the Jewish journeys of young adults.

Now is the time for JJF to leverage its vast resources and credibility to foster a flourishing, self-regenerating Jewish young adult ecosystem that organically links together all parts in service of the whole and continually adapts to and thrives in the evolving pace and space in which we live.

This approach to systemic change requires more than smart funding and replicating programs. It demands time, patience, and a willingness to invest not only in big ideas but also in the people and infrastructure that sustain them. It is hard, messy, and often not particularly glamorous work. But it is also the optimal way—some might argue the only way—to yield tangible, lasting community-wide impact.

And so before we go seeking the next silver bullet or panacea for engaging and educating young Jews, let us focus on securing our current investments and revitalizing the systems we already have in place, thereby creating a cohesive, intentional model of Jewish community in which all roads lead to the same end: ensuring vibrant, enduring Jewish life for generations to come.

Education Everywhere

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Here's the idea: We need a better understanding of how people learn to be Jewish. Let me be clear here: Being Jewish, as I understand it, runs the gamut from secular socialism to religious devotion and everything in between. Learning to be Jewish means developing a relationship with elements of Jewish cultural, religious, ethnic, or political traditions. It refers to a process that encompasses more than textual study and attends to more than merely the cultivation of a personal Jewish identity. Focusing on how people learn to be Jewish means emphasizing the ways in which people actually learn, rather than what many believe they ought to be taught.

Taking this approach to the work of the Jim Joseph Foundation means expanding its educational vision beyond schooling or camping, organized travel, or other structured experiences that have been designed to deliver a particular set of content goals or experiences. This approach goes beyond breaking down the barrier between "formal" and "informal" education and, it is hoped, avoids the mischaracterizations associated with "experiential" learning (I am pretty sure that reading a book is an "experience" too). Instead, such a shift in focus can begin to inform the work of those invested in Jewish education to better account for the myriad ways in which people encounter, assimilate, produce, and share Jewish knowledge, experience, and meaning.

A foundation, however, cannot just give its money anywhere and needs to see some measure of accountability for the gifts that it gives. Yet, the ways and places in which people learn to be Jewish are multiplying. Gone are the days of JCC's and synagogues as the only Jewish games in town. Now, film festivals, book clubs, and concerts punctuate people's cultural calendars. For news, people go online to peruse *Tablet Magazine* or *Haaretz*, the latter translated into English. Those interested in creating their own Jewish ritual experiences or learning a bit of traditional text can choose from any number of sites ranging from MyJewishLearning.com to Chabad.org. Consumers encounter Jewish characters nearly everywhere in popular culture, and they find Jewish themes in everything from reality television to films like *A Serious Man* to the rapidly swelling shelves of new fiction. People might click on links posted by friends to Facebook or Twitter, parents might send their children to the local synagogue for preschool, and students might participate in an Alternative Spring Break experience.

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The long and short of it is this. People are learning everywhere: Education is pervasive; learning is pervasive. As Buddhism teaches, "when the student is ready, the teacher will appear," and American Jews are nothing if not good students: They are encountering teachers everywhere, not just between the weekday hours of 8:15 and 3:00 or between 9:00 and 12:00 on Sundays. People do not stop learning when they close their books or when the bell rings to signal the end of the school day. For most people, that is when learning begins, even when they do not think they are doing so. Education is everywhere, so what is a foundation committed to supporting education supposed to do?

THE LANDSCAPE OF EDUCATION

Jewish education, obviously, overlaps significantly with American education, and both are experiencing moments of extraordinary upheaval. The emergence of "school choice" and charter schools has called into question the historical public–private divide with respect to funding, administration, and curriculum. The rising costs of four-year colleges, both public and private, have led people to reconsider the value of that once unquestioned investment. Online education companies like Coursera and Udacity are forcing institutions of higher learning to reconsider how they deliver course content to their students and who their students are. Finally, and perhaps most profoundly, the internet and mobile technologies have profoundly altered the relationship of people to information, empowering individuals to access, share, and create it—no matter where they are or whatever else they happen to be doing.

These changes are forcing people from across the educational spectrum to reconsider what they do; whom they serve; who should pay for their services; what they are worth; how to facilitate the transmission of knowledge, information, and culture; and to what ends. These changes are also shaping the culture, structure, and content of Jewish education, as schools, camps, travel programs, museums, communities, and cultural festivals have all begun to explore alternatives to their traditional venues. Camps use Facebook to connect alumni; museums develop complex web portals to engage visitors before, after, and instead of in-person visits; film festivals stream movies online; and webcasts, podcasts, and online articles continue to proliferate. If anyone anywhere has a curiosity about Judaism or Jews, they can access information from a variety of sources almost instantly.

Technology has not only expanded the availability of information; it has turned us all into ever-ready learners, where curiosity's itch can be scratched with the peck of a few fingers on a keyboard or a screen. If I want to learn to tie *tzitzit* or how to do *kaparot*, I can find instructional videos on YouTube. If I want to hear any portion of the Torah, chanted according to almost any traditional *nusakh*, I can hear samples online. Want to build a sukkah? Wondering about traditional meals from across the Jewish world? Interested in reading Israeli newspapers in Hebrew? Curious about the relationship between Hebrew and Aramaic? The information is just a tap and a swipe away.

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Powerful as it might be, this "question and answer" kind of learning represents only the thinnest kind of educational experience. It is learner centered to be sure, but it reduces education to a process of absorbing information, rather than accounting for the many other ways in which people learn—discursively, kinesthetically, affectively, and socially. Education is a far more complex, subtle, and sophisticated process, and for all the talk of online education, it continues to look like a thin version of offline education, with instructional videos instead of lectures, chat rooms instead of discussion sections, and multiple-choice exams instead of essays. Yet, the availability of education everywhere is forcing changes to educational efforts in every sector, and the stakes are high.

For Jewish education, the stakes are even higher, not because Jewish schools are threatened by massive online open classes (they are not), or because Facebook is threatening to replace summer camp reunions (it is not), or because people think Jewish education is too expensive (it might be, but cost is not deterring

large numbers of people—yet). Instead, the ready availability of information amplifies what has been true for a long time: Jewish educational endeavors have long emphasized socialization and acculturation over the transmission or accumulation of information. There is no Jewish SAT, no Hebrew school final exam, no Bar exam or board certification or merit badge for being Jewish. Nor should there be. So, at a moment in which anyone, anytime can access information about Jewish life, what happens to those people and institutions committed to education? What happens to teachers, schools, foundations, and policy makers when a smartphone has so much to teach anyone who is ready to learn?

JEWISH EDUCATION EVERYWHERE

Recognizing that education is everywhere means acknowledging that structured educational environments neither have a monopoly on nor present the best venues for learning. They remain important sites for the construction of social ties, for cultivating affinities, for reveling in the "collective effervescence" of community. They are powerful spaces for learning, but they are only a few nodes in a complex network of learning moments that include family meals, conversations with peer groups, and the consumption or creation of media, to name a few.

The widespread availability of information has the potential to connect these nodes more vibrantly, fostering greater, faster, and denser exchanges between them. This means that the boundaries that define Jewish educational experiences and the communal commitments they attempt to engender are always porous. Learners of all ages continually reach both into and out of Jewish experiences, carrying their MP3 collections, their non-Jewish friends and family members, their secular ambitions, political commitments, and senses of humor with them. This is not new, but within the context of education everywhere, it is happening more quickly and with greater activity than previously.

How people manage to move between communities, commitments, and cultures is, of course, something that is learned too. It is a skill that people use, practice, and develop—not just as children or young adults, but over the course of their entire lives. They assimilate new information and develop new strategies for negotiating their ever-evolving worldviews amid shifting constellations of social relationships. But nobody teaches people how to do that. Jewish educational efforts might explain congruencies between American and Jewish values (for example), but they rarely teach how to navigate between them. To learn that, people are largely on their own.

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When we recognize that education is everywhere, we have to reckon with what people learn, how they learn it, and where and why and who is doing the learning. This more expansive view of Jewish education everywhere includes museums and magazines in addition to schools and camps. It tries to account for YouTube and *The Jewish Catalog*, Wikipedia and the Talmud, not because the former references will replace the latter ones, but because they supplement the latter ones and, most importantly, people are already using them in combination (which, itself generates new modes of learning). If we can better understand how people learn to be Jewish, rather than how some people think other people ought to be taught to be Jewish, those of us involved and invested in Jewish education might be better able to address the needs of our learners as members of our Jewish communities.

Education everywhere means that people are learning all of the time, in a world of porous and flexible boundaries. They have easy access to information, and often, it arrives in bite-sized nuggets, tailored to a particular context, question, or need. Educational settings are increasingly penetrated by outside voices, and everyday experiences are infused with educational opportunities. Understanding the specifically Jewish themes that thread through education everywhere might help shift the focus of those invested in Jewish education away from Jewish education in isolation and toward the many registers in which people learn to be Jewish.

Sabbaticals: Formalized Renewal

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I have been thinking a lot lately about the new iPhone 5—not about the phone itself, but about the fact that two million people preordered it within 24 hours of the announcement of its launch. The iPhone's sleek new design and faster processor only partially account for this purchasing frenzy. Most people who bought the phone sight unseen did so because the phone was *new* and we live in a culture obsessed with the new. We covet the newest gadget, latest version, most updated feature—even when we have yet to master the devices we currently have.

Maybe then it is no accident that Apple always seems to release its new phone around the Jewish New Year. Rosh Hashanah comes as a corrective to this fascination with the new for its own sake. Yes it is a time to welcome a new year, eat new fruits, and—at least when I was young—buy a new pair of shoes. But Rosh Hashanah's core blessing is not a blessing of the new for the sake of newness. Rather we ask that we be *renewed* for a good and sweet year: newness as a critical process, not as obsession or fad.

A system of sabbatical—of formalized renewal—is critical if we are to be a thriving and vibrant community.

Which brings me to a very old idea that if implemented would have a profound effect on Jewish education and Jewish life in this country—the idea of sabbatical.

In my thought piece given to the Jim Joseph Foundation (JJF) board at its October 2006 retreat, I mentioned the need for instituting a sabbatical program in passing. Lately, though, I have realized that a system of sabbatical— of formalized renewal—is critical if we are to be a thriving and vibrant community. Sabbatical programs have the ability to help us in the following ways:

- Develop leadership that has both the capacity for creative thinking and the stamina to operationalize new ideas over the long haul
- Build and encourage a new generation of leadership
- Recognize the high price we ask of nonprofit executives, headmasters, and teachers and truly value the people behind the great ideas
- Seek effective solutions to the complex and long-term challenges we face

Some of the most creative companies already know the power of setting aside time for renewal. Every seven years, Stefan Sagmeister a designer in New York, closes his design studio for an entire year to give himself and his designers

time for personal experimentation (see http://www.ted.com/talks/stefan_sagmeister_the_power_of_time_off.html). They are free to pursue whatever they want, as long as it does not involve work for the office. In today's 24/7, always accessible, "you are only as good as your last project" world, this seems like an incredibly risky strategy—one that only a select few could pursue. But Sagmeister argues that he does not take the year off because his success allows him to do so. Rather, it is the other way around: The year off fuels his success for the next seven years. Says, Sagmeister, "[The sabbatical] is clearly enjoyable for myself but probably even more important…the work that comes out of this year, flows back into the company and into society at large." His ideas are more interesting, his work is once again a "calling," and his company is more financially successful as a result. When asked how important the sabbatical was to "replenishing creativity," Sagmeister replied: "On a scale of 1–10, 12."

3M, a global innovation company, figured out this benefit in 1948. That was the year they instituted the "15 Percent Time Program" which allows their engineers to take off 15% of their paid time to pursue creative ventures. (Scotch tape and Post-it Notes® were born this way.) Google's 20% time-off program led to the creation of Gmail and Google Earth.

The idea of sabbatical or formalized paid time off may seem to make sense for "creative" industries. However, what of the chronically under-resourced nonprofit sector where it is hard to imagine organizations making do without key staff for an extended period of time?

In 2010, five foundations that provide sabbaticals to nonprofit leaders published the study *Creative Disruption: Sabbaticals for Capacity Building and Leadership Development in the Non-Profit Sector*. The five programs featured in the study ranged in number of years of work required for participation from no minimum number to more than nine years (with most requiring the latter). And although most targeted executive directors, a few were open to other types of staff. Despite these differences, however, the programs shared three characteristics:

1. They were all created as a way to address "the stresses and demands of leadership (which) make intellectual, emotional, creative, and even physical burnout all too common among non-profit executives."
2. They all required participants to take off between three to four consecutive months and strongly discouraged them from being in contact with their offices during this time.
3. They all had a post-sabbatical reflection component to the program.

The overwhelming majority [of leaders] returned with a renewed commitment to their organization.

They also all yielded impressive results—both for the individuals who participated and for their organizations. Although many fear that taking a sabbatical will lead to leaders wanting to leave their positions, the reality is that the overwhelming majority returned with a renewed commitment to their organization:

- 87% of participants reported greater confidence in their job, allowing them to focus on higher level work in policy, to raise funds more effectively, and to "think outside the box" more freely on their return.
- 75% reported being able to crystallize an existing vision for their organization or frame a new one.
- 82% reported improved work/life balance and 64% better physical health.

- 60% reported that his or her board of directors became more effective as a result of the planning and learning that surrounded the sabbatical process.

These positive results also extended to those who served as interim directors, with the majority reporting having increased responsibility and more shared decision making even after the senior leader's return. This outcome is especially important as we face the challenge of leadership transition and the concern over how to cultivate the next generation of leadership. When the leader takes a sabbatical, second-tier leaders expand their skills and capacity. According to the report, "A sabbatical can act as a dry run for a future leadership transition. The experience can clarify what the [Executive Director's] responsibilities actually are—important information when looking for a successor. And interims can decide if the ED's job is really what they want."

Although the benefits are great, the costs to operate such a program are not. For each sabbatical participant, these foundations made grants of between $25,000 and $40,000 payable to the organization. These funds were used to partially cover the executive's salary while on leave, some travel expenses, a bonus for interim staff, and/or organizational development.

So what would a more formalized sabbatical program do to the field of Jewish education? What would it mean to give educators—and others who work and influence young people—the space to engage in their own ongoing education and exploration? What would be the impact on the community of leadership that is not overburdened and tired, but instead renewed, re-inspired, and open to new possibilities?

I caught a glimpse of this potential impact when, for the first time ever, I took a month off from work this summer. (Not quite enough time, but still…) After spending the first week running from yoga class to hike to yoga class all under the guise of relaxation, I finally realized that what I needed most was to slow down, to let my mind and body remember itself after years of multitasking and being perpetually plugged in. The impact on my work, my colleagues, and my own life has been quietly profound. I know that those who work for me can make good decisions without me being there and they now know that too. A work issue that I have been grappling with for a long time took on sudden clarity, and new ideas have begun to flow—accompanied by the energy to want to see them through.

I do not believe in magic bullets, but I do believe that our tradition offers us glimpses of a path by which to maneuver through the challenges of modern life. Fields should not be plowed every year if we want them to continue to bear fruit. Neither should people. May this be the year that we find a way to provide real renewal for those whom we rely on to fulfill the sacred work of our community. May they be renewed for a good and sweet year and may we be renewed as a community in the process.

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Engaging New Talent to Lead Change for the Next Jewish Community

Larry ***Moses***

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"The national Jewish community appears to be on the edge of a precipice. Within the next five to ten years, the baby boomers will retire and leave upwards of 75-90% of Jewish community agencies with the challenge of finding new executive leadership… The emerging executive leadership crisis may require system-wide approaches. Otherwise, we will be in a continuous cycle of organizations stealing the best and the brightest from each other, without a wide enough bench to fill all the positions."

- Michael Austin & Tracy Salkowitz (2009)

"An alarmingly low percentage (18%) of Jewish nonprofits have emergency back-up plans (EBPs) in place.… An even lower percentage (only 9%) maintain succession plans for top professional leadership. Another way of interpreting this sobering finding is that 91% or the organizations surveyed are not engaging in effective planning nor assuming any real accountability for sustaining their leadership succession."

- Steven Noble (2012)

"If you're not developing your 'high potentials,' you're going to pay for it later and the cost is going to be a lot more than you think."

– Dr. Marshall Goldsmith

"Great things are accomplished by talented people who believe they will accomplish them."

– Warren Bennis

"If we did all of the things we are capable of doing, we would literally astound ourselves."

– Thomas A. Edison

The Jewish community as a whole invests little in the development of professional talent.

All important endeavors in human life are talent-driven. This is no less the case in Jewish communal life. Our institutions will rise or fall, stagnate or renew, on the basis of talent—both professional and volunteer. Yet the Jewish community as a whole invests little in the development of professional talent. Entry-level training programs are underfunded, isolated, and disconnected from the organizations and constituencies they seek to serve. Continuing professional education is spotty at best, though better in some communities and organizations than in others. The Jewish professional field is highly decentralized and suffers from a lack of clear-cut credentials and well-defined skills and competencies. At a time when the need for dynamic executive skills, innovation, and new thinking in Jewish life has never been more pressing, the talent pool seems to be shrinking rather than growing.

Fortunately, new efforts to professionalize Jewish communal life have begun and of necessity operate in many different directions: encompassing recruitment, training, curricula, credential rethinking, early and mid-career continuing

professional training, bridging the gender gap, enhancing search and placement services, and more. This thought piece outlines a potential intervention in only one area—executive development for mid-career Jewish communal professionals and for those who will enter the field from other professional sectors. These individuals will soon be challenged not only to assume the highest executive responsibilities in Jewish organizations but at the same time to reinvent Jewish life in profound ways—to build "the next Jewish community."

THE "BIG IDEA": A CENTER FOR EXECUTIVE DEVELOPMENT—TALENT, TRANSITIONING, AND INVENTING THE NEXT JEWISH COMMUNITY

Much is made about numbers in Jewish life: the number of people we reach, influence, and affect. Most Jewish community accountability measures relate to the numbers game. Developing talent and identifying and training leaders call for a different measure. In 1957, the distinguished scholar Salo W. Baron wrote that "if the next generation of American Jews will harbor 100 truly first-rate scholars…100 first-rate writers…100 first-rate rabbis…100 first-rate lay leaders…one could look forward confidently to American Judaism's reaching new heights."

Baron's quote illustrates that when it comes to leaders and talent, the quantity measures are less significant than the quality measures. And indeed, we have all witnessed how one inspired leader can transform an organization, a community, even the Jewish people.

As one generation of top Jewish professional leaders prepares to depart our national, regional, and local agencies, we have not adequately prepared a new generation of leaders to guide us through the critical changes we face as a community. A Center for Executive Development would not only identify and train cohorts of outstanding mid-careerists (Executive Fellows) but would also do so *in an environment of innovation and invention*—understanding that this generation will be challenged to rethink and reshape Jewish life. The raw talent of individuals is not sufficient. The Center's harnessing of this talent in collaboration with gifted cohorts of peers around emergent visions of change will make it different from prior efforts.

A Center for Executive Development would not only identify and train cohorts of outstanding mid-careerists (Executive Fellows) but would also do so in an environment of innovation and invention.

The Center would aspire to do the following:

- Develop a set of executive learning opportunities around a curriculum of core skills and competencies to prepare the most promising mid-careerists for top executive positions in Jewish communal life. Participants would receive state-of-the-art training in management, strategic thinking, organizational development, and leadership skills to lead effective change efforts in Jewish organizational life. The Executive Fellows would be prepared for top positions in national agencies, Jewish Federations, local agencies, educational programs and institutions, and new collaborations and ventures.

1. One target population would be high-potential individuals currently working in Jewish settings.

2. Another target population would be high-potential individuals not currently working in Jewish settings, but capable of transitioning into such work.

- Serve as an incubator for new ideas and strategies for change in Jewish life. More than a think tank, the Center would become a space where the interplay

of ideas would ultimately take shape in the very practice of the individuals who propose them. In this sense, the Center would both serve as an executive training program AND a type of "Jewish" Aspen Institute—a high-minded, safe place where new thinking will be valued rather than discounted.
- Serve as an educational and professional resource in accessing best practices in executive education in related nonprofit disciplines and fields, thereby more clearly identifying the skill gaps and educational needs for Jewish communal executives specifically. Develop a Jewish leadership literature merging the best of leadership theory/thinking with uniquely Jewish values and challenges.
- Serve as a public advocate around issues of succession planning and executive transitioning in Jewish life.
- Develop materials and opportunities to enable sitting executives and volunteer leaders to derive succession plans and timetables and simultaneously groom new executive talent.
- Establish standards and certification opportunities for those who seek executive positions in Jewish life. Work with Jewish training institutions and organizational programs to bolster high-quality executive education in their curricula.

The Center would be pluralistic, independent of any singular Jewish communal organization or funder, and encompass individuals who seek to lead a wide range of Jewish communal and educational institutions. Cohorts would be enriched by a diversity of outlooks and aspirations. In an age when Jewish life is increasingly decentralized and fragmented, the learning culture of the Center would focus on the commonalities and connections that are critical in envisioning the next Jewish community.

The Center would be affiliated and work closely with at least two major academic institutions—for example, Harvard's Center for Public Leadership or Stanford University's business school—to enhance its effort to develop cutting-edge executive programs geared specifically to the next professional leaders of American Jewish life. In addition to executive education, mentoring, team projects, and writing exercises would be part of the executive fellowship experience. After the year-long fellowship experience, cohorts would convene periodically in ongoing symposia and retreats for continuing learning and mentoring opportunities.

The Center would also prepare the Executive Fellows to work with an entirely new generation of volunteer leaders, and secure the input of emergent volunteer leaders in the ongoing development and implementation of the Center's work.

Finally, the Center would be best established as an independent entity: a funding collaboration among a group of forward-thinking philanthropists/foundations. The impending "crisis" in executive succession has aroused strong concern in the Jewish funders' community, making the prospect for such a coalition timely. The Center would be accountable to trustees consisting of executives, academics, volunteer leaders, funders, and private sector organizational leaders.

A CLOSING THOUGHT

If 15 outstanding Executive Fellows could undergo such training each year, within five years there would be five cohorts of top professionals, 75 individuals in all, highly networked among each other, assuming high-level community and

national positions in Jewish life, and carrying innovations and new thinking forward as a result of their relationships and learning experiences. Imagine what 75 such well-placed and personally networked leaders could accomplish, both on the ground and in terms of changing the culture and mindset of Jewish organizational life.

The Center would not only be a place for imparting high-level competencies to particularly gifted individuals but—equally important—it would also be a creative space for imagination and innovation, a place where the Jewish future can incubate in the hearts and minds of the very individuals who will lead the community forward.

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Shedding Light on Jewish Education

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In 2000, Bill Gates announced that his foundation was developing a new program of education reform built around reducing the size of comprehensive high schools in order to increase the quality of student learning. The implementation of the "small schools" program was accompanied by careful research and evaluation, but five years later, Gates announced that the reform had failed: Shrinking the size of high schools had not worked. The quality of the teachers and teaching inside the school mattered far more than school size. In light of that evidence, Gates announced a new initiative that focused on the improvement of teaching and teacher quality in schools. That effort is still underway. It is accompanied by a great deal of documentation and data gathering to clarify what kinds of teaching works best with particular subjects and under particular conditions.

The longer I work in that corner of the world where philanthropy and education intersect, the more persuaded I have become of the wisdom that we should not aspire to predict the future; we should invent it. The track record of the great foundations is impressive in this regard. Carnegie, Ford, Mellon, Wallace, Hewlett, and other foundations have created fields where they did not exist before and have invented institutions no one could have predicted. Similarly, we can look at the accomplishments of the most esteemed Jewish foundations and observe comparable accomplishments. But we are in danger of failing to learn from the experience of Bill Gates that our enthusiasms must be tempered by evidence, our self-confidence moderated by good data. And the best data will often come from unexpected sources. Surprise can be our most important teacher.

For the past 25 years, I have played many roles in the world of foundations—as grantee, as board member, as president and as advisor. I have grown increasingly impressed by the successes of foundations in shaping and creating

new fields, and in anticipating markets and needs, rather than sitting around and waiting for them to emerge. The great foundations are not afraid of failure; they are afraid of fear-of-failure. And far worse than fearing failure is the accumulation of experiences that do not lead to learning. This is a lesson that the Jim Joseph Foundation has already learned, as demonstrated in the responsible manner in which it commissions careful evaluations to accompany most of its programs and in its receptiveness to evaluations that do not always bring good tidings.

What lies ahead for the field of Jewish education? I do not know, but I can guess that the future will not bring comfort to the nostalgic. The next generation in all areas of education will certainly be more digital, more networked, less place-bound, more jurisdictionally diverse, and less centrally regulated. Educational innovators will increasingly reach out to populations that were once perceived as hopelessly disengaged. And empirical studies, once thought to be the esoteric province of arcane academics, will become commonplace, necessary, and appreciated.

Precisely because the process of education is undergoing such transformation, from pre-kindergarten through the doctorate, from summer camps to museums, and from cable TV to YouTube, education programs will be more thoroughly studied in the next decade than in any earlier generation. They will be documented and measured, tested and reviewed, assessed and evaluated as never before. Innovation will not abate; it will increase—but it will not be conducted in the dark.

We learn primarily from experience, and we learn more from our mistakes than from our successes. However, we can only learn from mistakes that we acknowledge and seek to understand. When we begin to understand why some innovations work some of the time, we can abandon some, redesign others, and even mix and match features of several—and we can do so intelligently because we have real evidence, not self-fulfilling fantasies.

The strategy for ensuring that we engage in reform and innovation in Jewish education "with the lights on," with a clear grasp of where Jewish learners and teachers are and where they are going, in a landscape of good information and evidence rather than in a field of dreams and wishful thinking, has three components:

We can only learn from mistakes that we acknowledge and seek to understand.

1. Making information gathering ongoing and systemic, rather than episodic and opportunistic, and ensuring that the data collected are analytic and explanatory rather than merely census taking and satisfaction monitoring.
2. In addition to working with senior researchers and evaluators, taking full advantage of the opportunities provided by the graduate preparation of the next generation of Jewish education scholars and school leaders in seminaries, Hebrew Colleges and universities. We must harness the too-frequently disconnected applied research they already do in pursuit of their graduate degrees and help transform that work into components of a national Jewish education evidence-gathering effort.
3. Increasing the capacity of Jewish education leaders to integrate knowledge development with needed reforms of programs, curricula, and institution-building so that every funded project yields both clearly described outcomes and good data. In that manner, we become smarter about what we are doing as we do it.

Even the most singular successes of American Jewish education never taught us as much as they could have. For example, Camp Ramah is generally

recognized as a great success (full disclosure: I spent six years as a camper and then a counselor at Ramah in Wisconsin, and met my wife there), but we have no idea which aspects of the experience were most critical or why the camp experience left an indelible mark on some campers and barely a smudge on others. In my northern California neighborhood, the Wexner Heritage Seminars are credited with having transformational impacts on young adults who went on to significant lay leadership roles in Jewish education and the Jewish community. If this is so, why did it happen and to whom? I could continue with many other examples of both ostensible successes and apparent failures from which we have learned far too little because we have asked too little, too late, and too superficially.

At times, the need for careful data gathering and follow-up only become apparent many years later. In the 1970s, the City College of New York began an open-admissions policy for entering high school graduates in New York City. It was highly controversial and the short-term studies did not support the wisdom of the experiment. However, the female participants were followed up for a number of years, and the researchers made a stunning discovery (detailed in an award-winning book, *Passing the Torch*): There was an apparent "sleeper effect" associated with the affirmative action program. The *children* of the "special admit" students had a dramatically more positive record of college attendance, academic success, and subsequent careers. In a field like Jewish education, how many of our programs are seeking long-term impacts that may have larger sleeper effects than short-term impacts? Which programs affect the intergenerational bungee cord that pulls apparently disengaged Jews back into the community? For a few other examples, see the box accompanying this article.

I believe we need the Jim Joseph Foundation to take the leadership in developing a national information and evidence-gathering strategy together with other collaborating foundations, institutions of higher education, evaluation agencies that do a substantial amount of data gathering, graduate programs, and independent agencies such as bureaus of Jewish education and Jewish education nonprofits. Such a strategy would create a set of baseline indicators of Jewish education that could be used to enrich our analysis and interpretation of the meaning of subsequent studies.

In a field like Jewish education, how many of our programs are seeking long-term impacts that may have larger sleeper effects than short-term impacts?

We have one example of such a strategy in the emerging Consortium for Applied Research in Jewish Education (CASJE), but it is not enough. I can imagine using Jim Joseph's camping incubator project as a powerful model for actively stimulating such an approach to grantmaking. We may need to fund the Jewish education equivalent of "brain camps" where the field of applied neurosciences has been able to make such dramatic progress over the past decade. Can we fund the development of a powerful set of Jewish education indicators that would be like the National Assessment of Educational Progress (NAEP) or the Organization for Economic Cooperation and Development's PISA (Program for International Assessment) assessments that measure not only what students *know* but also how they apply their knowledge in complex situations and examines their sense of civic identity and responsibility? This is much more ambitious and analytically powerful than indicator projects like JData.

Now is the time to move vigorously to ensure that the lights will be even brighter and the evidence made possible by that will not give way to darkness.

New York Times columnist David Brooks is particularly adept at using social science and educational studies to illuminate broad general questions of educational policy. Here are two examples from his September 28, 2012, column in the *New York Times*:

THE VALUE OF LONGER TERM FOLLOW-UP OF AN APPARENTLY SUCCESSFUL SCHOOL REFORM PROGRAM

Schools in the Knowledge Is Power Program (KIPP) are among the best college prep academies for disadvantaged kids. Yet in its first survey a few years ago, KIPP discovered that three-quarters of its graduates were not making it through college. It was not the students with the lowest high school grades who were dropping out at the highest rates. Rather, it was the ones with the weakest resilience and social skills. It was the pessimists.

What are the Jewish education equivalents of the noncognitive qualities like resilience and social skills that may be better determinants of long-term consequences than the more easily measured cognitive outcomes? What is "Jewish resilience"? Why do some Jews undertake some of the most effective educational experiences such as day schools and summer camps and still not "make it," whereas others seem to have no valuable early experiences yet turn out to be Jewish leaders?

THE PREDICTIVE VALIDITY OF BROAD SURVEY DATA COLLECTED EARLIER IN LIFE AND THEIR RELATIONSHIP TO LATER LIFE EXPERIENCES, CONDITIONS, AND OUTCOMES (WITH NO PARTICULAR INTERVENTION OR REFORM)

In the 1990s, Vincent Felitti and Robert Anda conducted a study on adverse childhood experiences. They asked 17,000 mostly white, mostly upscale patients enrolled in a Kaiser HMO to describe whether they had experienced any of 10 categories of childhood trauma; for example, if they had been abused, their parents had divorced, or family members had been incarcerated or declared mentally ill. Then they gave them what came to be known as ACE scores, depending on how many of the 10 experiences they had endured.

The link between childhood trauma and adult outcomes was striking. People with an ACE score of 4 were seven times more likely to be alcoholics as adults than people with an ACE score of 0. They were six times more likely to have had sex before age 15, twice as likely to be diagnosed with cancer, and four times as likely to suffer emphysema. People with an ACE score above 6 were 30 times more likely to have attempted suicide. Later research suggested that only 3% of students with an ACE score of 0 had learning or behavioral problems in school compared to 51% of students with an ACE score of 4 or higher.

What would such an index (or indices) look like for Jewish education? Can an "index of Jewish peoplehood" be developed and validated that will help us measure and then act on the real factors that predict later "Jewish health?" [I recognize that efforts toward such an index have begun in several places, but here again, there is little consolidation or collaboration around these measures, their validation and their broader use.]

Prerequisites for the Next Big Idea

Jeffrey ***Solomon***
President, The Andrea and Charles Bronfman Philanthropies, New York

I am going to have the chutzpah to tweak your question, "What is your 'big idea' for the future of Jewish education?" I do so not because I believe that there are not many big ideas. On the contrary, I think that the big ideas are in front of us all the time and that we do not engage seriously enough in developing our theories of change and behavior, enabling us to capture and exploit them.

But I am tweaking this question because we often seem to mischaracterize new programs as "big ideas." Birthright Israel is a case in point, having become the paradigm of a big new Jewish idea. It is not. It is simply a disruptive technology applied to a very old, very solid notion of the transformative effect of taking young people to Israel. The analysis of this disruptive technology is important because it suggests a way that foundations might evaluate ideas and concepts.

What were the disruptions brought about by Birthright?

Birthright Israel...is simply a disruptive technology applied to a very old, very solid notion of the transformative effect of taking young people to Israel.

AGE

Before Birthright, the classic age for Israel trips was high school. This focus did not take into account the changes that have taken place in developmental psychology over the past three decades, which suggest that identity formation occurs at a much older age than was earlier thought. The change made by Birthright also recognizes that it is the "G-d squad," those families that have a commitment to Judaism that have aligned parents and children who will resonate with an Israel trip. Changing the age criterion to the group 18–26 was a statement about both of these issues and achieved one of Birthright's most important objective: reaching the "marginalized" young Jew. Birthright also operated with a self-confidence that mirrored the self-confidence of this generation.

Fealty to mission over fealty to organization is an important lesson that can and should be replicated in the work of foundations.

ORGANIZING PRINCIPLES

One of the five core principles of Birthright was that it would operate on a market-driven basis, in contrast to too much of organized Jewish life that operates with the lassitude of monopolies. Having nonprofit and for-profit educational organizations compete to be trip providers yielded higher quality and more creative trip offerings. Inherent in this principle was that the Birthright organization served as a franchisor, establishing standards, maintaining quality assurance, and using financing as the organizing tool. Here again, the fealty was to the mission of Birthright which is to enable participants to increase their Jewish identity, their connection to Israel, and their connection to the Jewish people. Those goals were at the center, with no need to consider organizational loyalty. So when Hillel leadership came to the nascent Birthright organization and said, "We can run it," they were told, "You can be one of the trip organizers and to the degree that you are successful, you will have a greater or lesser share of the participants." Fealty to mission over fealty to organization is an important lesson that can and should be replicated in the work of foundations.

LENGTH OF THE ISRAEL TRIP

At the time that Birthright was founded, the average trip length was six weeks. This certainly did not fit within the lifestyle of most North American Jewish families with teens. Consequently those who went on Israel trips were those who had engaged in Jewish camping or synagogue youth group life: They were from the inner circle. Most commentators treated the creation of a ten-day trip as a joke. What they did not realize was the intensity in the educational objectives and standards, and the level of seriousness behind the curtain that made the trip's impact far greater than that of trips many times its length.

EVALUATION

Another core principle was that evaluation was to be part of the core budget of Birthright. Today more is known about the impact of Birthright—knowledge gained both from the formal evaluation of Birthright and the many doctoral dissertations and other academic pursuits regarding the program—than about any other area of Jewish education. Understanding its impact is a critical component of the work of Birthright Israel and should be a critical component of all work that foundations support. After all, we live in the era of "big data." Shame on us for not integrating that knowledge equation into contemporary Jewish life.

IMPLICATIONS FOR JEWISH FOUNDATIONS

As the Birthright experience illustrates, the Jim Joseph Foundation and others need to be bolder, but to act boldly based on strategic clarity: Decide on the two or three or four major objectives you would like to achieve in Jewish education and then focus on them in the context of the following triad:

1. Provisions: What are the provisions of the programs that you think can achieve these objectives? There must be an absolute alignment between those provisions and the objectives you are trying to achieve. Thinking through the necessary tactics to support your strategies is the responsibility of the foundation, not of your potential partners.

2. Delivery systems: Think about the panoply of Jewish organizations as potential delivery systems for the provisions of *your* strategy. It is a difficult way of thinking about many of the legacy organizations that you may have supported thus far. However, one of the choices that many foundations have not yet made is whether to support dynamic programs that can improve Jewish life or institutions that serve the Jewish community. You are trying to do both, which limits your impact. A hard-hitting strategy would make clear the answer to that question.

3. Financing mechanisms: I want to recognize and congratulate JJF on its role in the major financing of the next phase of the development of Moishe House. Second-stage financing is an enormous opportunity that warrants expansion. However, I would remind us of the core lesson of Tom Tierney and Joel Fleishman's new book on strategic philanthropy, *Fewer, Larger, Longer*. Although you have made big bets to date, I would encourage bigger bets, but bigger bets that are tied to those strategic objectives that you have identified. (Before its spend-down, Andrea & Charles Bronfman Philanthropies had assets of approximately

After all, we live in the era of "big data." Shame on us for not integrating that knowledge equation into contemporary Jewish life.

15% percent of those of JJF, yet it risked $8 million, spent in six months, as risk capital for Birthright Israel and, with future commitments, is approaching $100 million of support for the program.)

There are many such opportunities for JJF as it continues to strive for a stronger, more welcoming, more dynamic Jewish community.

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Jewish Orthodox Feminist Alliance
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Jewish Theological Seminary of America
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