Funding Philanthropy

Philanthropic Funding for Jewish Education: Unlimited Potential, Questionable Will

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Amid all of the changes that have taken place within the American Jewish community during the past fifteen years, few are as striking and significant as those in the fields of Jewish philanthropy and Jewish education. These two areas have experienced fundamental shifts, independently and in relationship to each other, and both are now regarded as among the most dynamic aspects of Jewish communal life.

Lying at the heart of the recent transformations in both fields are three overarching trends: (a) the assimilation of substantial numbers of Jews into the larger American society, resulting in the abandonment of behaviors and social interactions that had long been the hallmark of the Jewish community; (b) the emergence of increased funding for a broad array of Jewish education programs and institutions as a response to that abandonment; and (c) a growing interest in research by Jewish educators, policymakers and philanthropists seeking to ascertain the extent to which various kinds of Jewish educational experiences actually strengthen Jewish identity and lead to greater participation in Jewish life.

While these trends are helping to reshape the current landscape of the organized Jewish community in a positive manner, the prospects for a truly vibrant American Jewish community in the years ahead will depend on the degree to which Jewish communal leaders, philanthropists and researchers are able to reinforce and sustain their current efforts by attracting significantly greater resources for effective Jewish educational programming.

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During the past two decades momentum in the field of Jewish philanthropy has shifted away from centralized fundraising and allocations through the Jewish federation system toward private philanthropists funding independently or in small groups. To some degree this shift from communal action to atomized funding mirrors a trend in American philanthropy generally (Blum 2005; *Business Week*, Oct. 6, 1997). As sociologist Gary A. Tobin has noted, there has been an "Americanization of Jewish philanthropy" resulting from the significant integration of Jews into American society, and thus Jewish philanthropic trends are likely to track philanthropy in America generally (Tobin 2001; Panepento 2005).

The shift in momentum toward private Jewish philanthropy also reflects factors and challenges that are unique to the American Jewish community. For years the Jewish federation system was widely and justifiably recognized as a fundraising juggernaut. It was the self-proclaimed "central address" of Jewish giving; the largest federations collected and allocated tens of millions of dollars each year through a well-choreographed, consensus-driven, and deliberative process in which volunteer leadership typically worked very closely with their professional counterparts[1] (Raphael 1977). By the

[1]That perception of the federation system was captured by Marc Lee Raphael in a 1977 book review for *Commentary*: "Philanthropy in Judaism is not so much an individual as a collective project, and has become even more of one in recent American Jewish life. The federated Jewish philanthropies in this country, which have acquired greater and greater control over welfare, social-service, and Israel-related programs in the past decades, have also come to identify themselves as the chief public representatives of the Jewish community" (*Commentary*, September 1977 p. 84). The same point is made more pithily in the punch line to a popular joke about two men (one of whom is Jewish) stranded on a deserted island. The Jew is unconcerned for his future, secure in

1990s the effectiveness of the federations had dimmed. Overall giving to federations did not nearly keep pace with the fantastic economic growth, and the average age of federation donors rose (Popper 2004; D.N. Cohen 2005; NJPS 2000-2001 2004, p. 9).[2]

The decline in federation fundraising was partially explained by the findings of the National Jewish Population Survey 1990 (NJPS 1990), which showed large numbers of American Jews opting out of engagement with Jewish life, including federation giving. This Judaic abandonment, represented most vividly by the infamous finding of a 52% rate of intermarriage, (Kosmin et al. 1991, p. 14), led many to suggest that a dramatic change in the priorities of the federated system would be required to inspire, engage and educate a new generation of American Jews. Indeed, after heated communal debate, federations began reducing their allocations to the State of Israel in favor of domestic giving (D.N. Cohen 2004). Many federations established "continuity commissions," and there was much talk about the need to devote more resources to Jewish education and identity programs.

At the same time as the federation system began to grapple with these challenges, a significant number of existing and potential donors with substantial personal wealth and influence began to take greater interest in the future of the American Jewish community. Many of these philanthropists and foundations turned to the federation system for guidance and partnership as they commenced their own philanthropic journeys through personal giving, family foundations or donor-advised funds.

With a few notable exceptions, what these philanthropists discovered about the federation world did not impress them. They found a system responding to the situation in a slow, bureaucratic fashion, failing to recognize the true extent of the problem at hand. According to Edelsberg, "Frankly, federations' abiding commitment to process too often collides headlong with a new, donor-driven agenda that requires federations to focus on outcomes, efficiency and effectiveness" (2005). Unwilling to either delegate the initiative to the federation system or altogether abandon the Jewish community, many of the philanthropists began working outside the system to develop Jewish educational institutions and programs they believed would be more effective in the struggle to reverse the troubling trends reported in NJPS 1990.

In addition to their willingness to pour millions of dollars into programs designed to promote "Jewish continuity" or a "Jewish renaissance," private Jewish philanthropists introduced a much more bottom line, businesslike approach to Jewish philanthropy than had existed in the past. They represented the Jewish "new" or "venture" philanthropists, terms that gained prominence in the late 1990s to describe funders who engaged in their giving in much the same manner as venture capitalists invested their money (Letts et al. 1997). Those characteristics most often associated with venture philanthropists are: (a) an interest in reviewing relevant research and performing other due diligence before making a grant; (b) a willingness to act quickly and nimbly, either alone or in partnership with others who shared their social objectives; (c) a desire to be personally involved in the development and implementation of the programs they choose to fund; (d) a commitment to evaluation; and (e) a dispassionate, results-oriented approach to making funding decisions (Billitteri 2000, 2002).

Today an uneasy alliance exists in Jewish philanthropy. Still reeling from the conditions that led to the merger creating the United Jewish Communities (UJC) in 1999[3] (Bubis & Windmueller 2005), local federations are nonetheless trying to find a way to work with venture philanthropists. One challenge is that the philanthropists often come to the table with specific goals and approaches, while federations are consensus-driven communal institutions responsible to help maintain basic local agencies such as family services and the home for the aged and to contribute to causes in Israel. Recognizing the need for cooperation, many foundations and individual philanthropists are explor-

the knowledge that the fundraisers at the United Jewish Appeal will find him.

[2] NJPS 2000–01, commissioned and published by the United Jewish Communities, is cited sparingly here because the survey was marred by questions about its reliability. In general it indicated a kind of polarization within the American Jewish community between the affiliated and the unaffiliated, and between those who were in-married and those who were intermarried. The affiliated were substantially more likely to engage in a range of behaviors, including ritual practice and enrolling both themselves and their children in Jewish education (NJPS 2000–01, p. 27).

[3] Until the merger in 1999, the four legs of the North American Jewish federation system were the United Jewish Appeal (UJA), the United Israel Appeal (UIA), the Council of Jewish Federations (CJF) and all of the local federations serving Jewish communities throughout the United States and Canada. The three national umbrella organizations were then merged to become the UJC.

ing ways of partnering with the federation system without forsaking their independence or ability to act quickly.[4]

For the sake of the future of the American Jewish community, and especially for the field of Jewish education, it is important that both of the partners in this philanthropic dance continue to search for meaningful and effective ways to work together. Estimates of Jewish charitable resources are breathtakingly large; the value of the endowment funds held by the federation system as a whole is over $10 billion,[5] while Jewish family and independent foundations are said to have more than $25 billion in combined assets (Charendoff 2002). Even more remarkable is what the future holds. According to researchers at Boston College, the projected intergenerational transfer of American wealth through 2052 is in excess of $41 *trillion*, a disproportionate amount of which will likely end up in Jewish hands (Havens & Schervish 1999, 2003).

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As staggering as Jewish philanthropic capabilities may be now and in the future, the extraordinary potential and financial needs of Jewish education have become equally evident over the past fifteen years.

Today Jewish education is a multi-billion-dollar enterprise, the vast majority of which is covered by tuitions (day schools), synagogue membership dues (supplementary education), fees (summer camps), dues (youth groups) and philanthropy. Assuming an average cost of $10,000 per student for approximately 200,000 students, the current annual operating cost of the American Jewish day school system alone is $2 billion (Wertheimer 2001). It seems likely that the cost for the full Jewish education system easily exceeds $3 billion annually.

Along with the growth of the educational system, there has been an expansion of the concept of Jewish education. Barry Chazan, a widely respected Jewish educator, explained the shift:

> Older notions of Jewish education saw it as aimed at children, housed in schools, and focused on either cognitive transmission or communal solidarity. Newer notions see it as lifelong, taking place on a campus that extends beyond classroom, and focused on shaping the total, holistic self. The clients of Jewish education are, increasingly, Jews of all ages—from preschoolers and their parents, to adolescents, university students and young adults, to adults and senior citizens. The venues of Jewish education are, increasingly, not just in school buildings in the local community, but in the larger Jewish world—learning takes place in day and supplementary schools, Jewish community centers, summer camps, college campuses, and on trips to Europe and Israel. The emerging aim of Jewish education, regardless of age level or setting, is to touch the inner soul and affect the Jew within (Chazan 2002).

While all of these types of Jewish experience have long existed, it is only in the past 15 years that the community has come to view them as part of a systemic whole. This new holistic view of Jewish education has generated a renewed sense of optimism within the Jewish educational community.

Although much of the growth in Jewish education stems from the grassroots efforts of local donors and professionals,[6] a small group of philanthropists operating on both the national and international levels have played a crucial role in making the case for increased funding of Jewish education in general and in stimulating much of the experimentation taking place in the field. These philanthropists, some of the more active and well-known of whom are routinely identified as "mega-donors," have also financed many of the research and evaluation projects undertaken in an effort to collect the kind

[4] In this context it is important to recognize the efforts of the Covenant Foundation, which is a joint program of the Crown Family Foundation and the Jewish Education Service of North America (JESNA), a national federation-affiliated agency. For more than fifteen years the Covenant Foundation has worked to honor outstanding Jewish educators and support creative approaches to Jewish educational programming.

[5] The 2005 Survey of Federation Endowment Development reported $10.2 billion dollars in total endowment assets owned by Jewish federations/community foundations (information obtained from UJC). However, not all of these funds are necessarily destined for Jewish causes or federation-affiliated programs. In 2005 more than half of these endowment assets were held in supporting foundations or in local donor-advised funds, vehicles that, depending on the rules of the local federation, enable donors to recommend allocations to both Jewish and secular organizations.

[6] In this context it is important to recognize the efforts of the Wexner Heritage Foundation, whose inspirational programming for local lay leaders seems to have stimulated significant grassroots activity.

of data necessary to measure the effectiveness of educational programs and, quite often, to attract new sources of funding for the field.

As a direct result of those efforts, a significant body of research about Jewish education has emerged over the past fifteen years to suggest that certain kinds of Jewish educational experiences have greater impact than others on the Jewish identities of those who participate in them. Not surprisingly, and quite appropriately, this data is being used to raise additional and much-needed philanthropic resources for those initiatives that research suggests are the most effective in accomplishing their educational goals.

Perhaps nowhere is that phenomenon more evident than in the area of Jewish day schools. Long a province almost exclusively of Orthodox Jewry, day schools had until the 1990s received the attention of only one major philanthropy, The Gruss Life Monuments Fund, which offers an impressive range of programs. Today, however, day school education has emerged as an area of significant interest and activity for the entire Jewish community (Ellenson & Zeldin 2004).

In 1993 the Jerusalem-based Louis Guttman Israel Institute of Applied Social Research issued a provocative report based on the findings of NJPS 1990 confirming that "Jewish day schools are the best vehicle for implementing Jewish involvement." Equally significant, the report found that "At least nine years of Jewish education mark the most significant upward jump in Jewish involvement" (Louis Guttman Israel Institute of Applied Social Research 1993).

The Guttman report convinced The Avi Chai Foundation, which had commissioned the study, to shift its philanthropic focus to the day school field, with a focus on high schools. The Guttman report and others that followed lent significant credibility to the effort by Michael Steinhardt and Rabbi Irving "Yitz" Greenberg to create an $18 million philanthropic partnership specifically for the purpose of expanding the number of Jewish day and high schools in North America. The first meeting of the **Partnership for Excellence in Jewish Education (PEJE)** took place in 1997, and under the able leadership of Rabbi Joshua Elkin, it is now recognized as a valuable resource center for innovation and growth.[7] Inspired by the success of PEJE, Bay-area philanthropist Laura Lauder joined with several other major philanthropists to create **DeLeT (Day-school Leadership through Teaching),** a $6 million national fellowship program created in 2002 and designed to attract, train, inspire and retain top-quality educators for day schools.[8] In 2004 a group of anonymous donors in Boston banded together and pledged $45 million to enhance the fourteen local day schools, with three of the schools to receive a total of $30 million from the gift (Paulson 2004).

Research conducted in 1998 and again in 2003 by Dr. Marvin Schick, the pre-eminent scholar of the day school system, suggests that Jewish day schools represent both a stunning success (measured by growth to date) and unrealized potential (measured by the percentage of non–Orthodox Jews enrolled) as a communal response to advancing assimilation. Dr. Schick found that day school enrollment grew by nearly 30% in the years between 1992–93 and 2003–04, with the larger percentage of growth in the non–Orthodox sector. The most obvious development has been among non–Orthodox high schools. While there were five such schools in 1990, today there are approximately thirty-five throughout the United States (Schick 2005).

This growth is remarkable given the pressure rising tuition costs are placing on many families. The need to raise tuition levels simply to continue providing what already exists compels Jewish educational institutions to charge high prices while at the same time offering a product that is not nearly as strong as it needs to be to engage larger numbers of American Jews. As was stated in a report issued in 2003 by The Continental Council for Jewish Day School Education, an initiative spearheaded by the UJC and the Jewish Education Service of North America (JESNA):

[7] The original partners in PEJE were The Abramson Family Foundation, Avi Chai, The Andrea & Charles Bronfman Philanthropies, Edgar M. Bronfman, The Harold Grinspoon Foundation, The Jesselson Family, Jim Joseph, Morton Mandel, Charles and Lynn Schusterman, Michael Steinhardt/Jewish Life Network, the UJA Federation of New York and Leslie H. Wexner. A list of the current partners and a wealth of additional material can be found at peje.org.

[8] There are a number of teacher recruitment and training programs ranging from the Beth Jacob seminaries, to universities such as JTS and Hebrew College, to newer programs such as the Pardes Educators Program in Israel and a similar program involving the Hartman Institute in Jerusalem and Tel Aviv University. In 2004 the Jewish Education Service of North America (JESNA) convened a Jewish Education Leadership Summit, one outcome of which was the creation of JERRI: the Jewish Educator Recruitment and Retention Initiative. Among the more successful JESNA ventures in this area is the Lainer Interns for Jewish Education program, one that gives self-selected North American college students spending a year in Israel the opportunity to learn about careers in Jewish education and provides mentorships upon their return. According to an internal JESNA study on early participants in the program, approximately 60% of them are now Jewish communal professionals,

> Schools are caught in the quandary of balancing affordability and quality. They will only attract students if they provide high quality, state-of-the-art Jewish and general education that requires ongoing continual updating of facilities, technology, curricular materials, professional development, co-curricular offerings, and more. At the same time, escalating costs of providing quality education make tuition prohibitive to large segments of the population (JESNA 2003).

A July 2003 report by the Cohen Center for Modern Jewish Studies at Brandeis University put it even more succinctly: "Balancing tuition costs with the needs for funds to ensure breadth and depth in school offerings is the essential challenge" (Cohen Center for Modern Jewish Studies 2003, unpublished).

The fact that high tuitions pose both a financial struggle for day school parents and a barrier to entry for prospective parents has been recognized for more than a decade. In an analysis of a study of Conservative synagogue members in 1995, Cohen found that day school enrollment was lowest in middle-income households ($75,000–99,000) (S. M. Cohen 1995). This makes intuitive sense; upper-income families can better afford tuition, while lower-income families qualify for scholarships, leaving the middle-income households to struggle the most with tuition.[9]

This data prompted Avi Chai to experiment with a voucher program in Atlanta and Cleveland. The program offered a $3,000 voucher per year for four years, but only for children in second grade and up who did not have an older sibling in day school. The program was an experiment to test the impact of cost reduction on day school enrollment as well as an attempt to demonstrate to the Jewish community the potential impact of a government voucher program.

Over two years (1997–98 and 1998–99) 213 children were recruited to day school through the voucher program. Extensive research conducted by the Cohen Center for Modern Jewish Studies at Brandeis University ("the Cohen Center") accompanied the program (Cohen Center for Modern Jewish Studies 2003, unpublished). One significant finding was that while tuition is not the single most important factor in parental decision making about their children's Jewish education,[10] it can be the "tipping point," particularly if parents disagree about the proper setting for their children's education.[11]

Independent of the Avi Chai program, the Samis Foundation in Seattle experimented with another form of tuition reduction. From 1997 to 2001 Samis made a grant to the only Jewish high school in Seattle to reduce tuition for all students from $7,200 to $3,000 (subsequently tuition rose but was still highly subsidized). In the ensuing years the school's enrollment grew from 56 to over 130.[12]

Both the Avi Chai and Samis programs served as models for subsequent philanthropic efforts, and new ideas were developed as well. The Continental Council for Jewish Day School Education, a JESNA/UJC initiative, assembled a report in June 2003 collecting information on twelve different tuition reduction programs, including a Schusterman Family Foundation-supported "fair share" tuition abatement program pegged to household income that is still in use at Heritage Academy in Tulsa, Oklahoma. The report listed the lessons learned for the benefit of communities and philanthropists seeking to adopt or adapt any of the programs (JESNA 2003). Recently the Solomon Schechter and Agnon schools in Cleveland introduced an across-the-board tuition reduction that will be partially funded as part of a major federation campaign that will fund day schools, among many other communal agencies.[13]

In much the same way as the leading funders of day school education have used research to inform their work in that field, a growing number of Jewish philanthropists are beginning to rely more

[9] Results would likely be different among Orthodox families, where day school enrollment is the norm for virtually all families.

[10] In fact, as many as 40% of the parents reported that they either "would have" or "might have" switched their children to day school even without the voucher. The credibility of these statements must be weighed against the low historic rate of transfer into the participating schools from second grade and up.

[11] Having proven the value of a voucher program in attracting new parents as well as the complexity involved in parental decision making, Avi Chai did not renew the experimental program. It viewed follow-up as a task for the local communities, one of which (see below) has picked up the challenge.

[12] In subsequent years SAMIS modified the program when it became apparent that the foundation was becoming the single largest source of revenue for the school, a position SAMIS viewed as unhealthy for the school.

[13] In March 2005, the Torah Academy in Minneapolis also announced a program that will provide vouchers decreasing over time for children transferring from public or non-Jewish private schools.

on evaluations and other studies to guide their philanthropic activities. In most cases, rather than research driving funding, research is following the money as philanthropists seek to assess the value of their efforts.

One question remains unanswered by the research to date: the extent of additional funding needed to provide the range of Jewish educational programming required to counteract the Judaic abandonment with which the American Jewish community continues to struggle. In the case of day schools, Wertheimer (2001) has suggested that adding 100,000 day school students to the system would entail capital costs of $1.35 billion and $250 million to prepare the necessary teachers. Moreover, it is likely that expanding the day school population in this way would necessitate tuition incentives that would require raising hundreds of millions in scholarship dollars annually.

Given that realizing the full potential of day schools alone may require the investment of billions of dollars, the total cost for providing a full range of quality Jewish educational experiences for American Jews of every age appears daunting. Fortunately, the last fifteen years have witnessed a substantial infusion of new money into the field. Among the other Jewish educational initiatives receiving significant funding, most of which benefit from a healthy interaction between philanthropy and research, are the following.

1. Trips to Israel. Although much anecdotal information about the educational value of an Israel experience existed for years, data from NJPS 1990, 2000–01 and other studies (E. Cohen 1999; S.M. Cohen & Kotler-Berkowitz 2004) finally confirmed the generally-accepted wisdom that trips to Israel correlate with increased Jewish involvements. In 1999 a coalition of philanthropists led by Michael Steinhardt and Charles Bronfman persuaded the State of Israel and the UJC to join them in establishing the $210 million **Birthright Israel** program, which recently brought its 120,000th participant to Israel. Longitudinal studies conducted by the Cohen Center of more than 70,000 Birthright alumni reveal that this free ten-day educational experience in Israel for 18–26-year-olds has significantly strengthened the participants' Jewish identities and their sense of connection to Israel and has led to an increase in their Jewish involvement when they return to their home communities (Cohen Center for Modern Jewish Studies 2004, 2006). A recent study of the **March of the Living** program for high school students produced similar findings (Helmreich 2005).

   Hoping to capitalize on the success of **Birthright Israel** and other Israel experiences, the government of Israel joined with the Jewish Agency for Israel (JAFI) in December 2004, to launch the MASA Program. According to a press release issued by JAFI, "the MASA project (meaning "journey")...aims to provide 20,000 young Jews from around the world each year with a semester to year-long program of studying and volunteering in Israel" (JAFI, 2004). The budget for MASA is expected to rise to $100 million, based on equal contributions from the government of Israel and a JAFI-led partnership that will include private philanthropists by the time the goal of 20,000 students/year is reached (Kraft 2005). Approximately 6,800 people attended MASA-approved programs in 2005–06 (MASA 2006).
2. Campus Programming: The annual budget of **Hillel: The Foundation for Jewish Campus Life** was $18 million in 1990; today it is $60 million and climbing (Hillel internal documents). This impressive increase is a direct result of a communal decision in 1995 to make the campus a focal point of Jewish investment, one supported by both the mega-donors (led by Edgar Bronfman) and the federations (Council of Jewish Federations 1995). During the past fifteen years—with Richard Joel at the helm for most of them—Hillel has successfully implemented a multi-faceted fundraising strategy that has attracted more than 250,000 new donors and resulted in the construction of more than 25 new buildings for the approximately 350,000 young Jews on college campuses each year. As in the case of trips to Israel, the overall effect of Hillel's work is difficult to measure and the precise percentage of students Hillel reaches is uncertain. However, the first effort to measure Jewish life on campus was recently undertaken by researchers from the Cohen Center. Based on interviews and surveys at 20 campuses throughout North America, approximately 45% percent of all Jewish students on campus spend some time at Hillel or other Jewish-affiliated clubs or organizations (Sales & Saxe 2005;

p. 12). A similar percentage of all Jewish students on the campuses included in that survey take at least one Jewish studies class by the time they graduate (*Ibid.*, p. 21). Further, Hillel, after undertaking a strategic planning process, in 2006 developed a five-year plan to dramatically increase the number of students involved in Jewish life and having meaningful Jewish experiences. Wayne Firestone, recently promoted internally to be Hillel's new president, leads the organization in the implementation of the new plan.

3. Summer Camping. One of the informal educational experiences studied most heavily during the past decade has been Jewish overnight camping (see *www.jewishcamping.org*). Multiple studies, from NJPS to specific research on Camp Ramah (Keysar & Kosmin, 2004), have shown the link between Jewish camping and subsequent Jewish engagement. In 2000, the Cohen Center undertook a comprehensive programmatic study of overnight camps and developed programmatic recommendations for a field they described as "an ideal venue for informal Jewish education that gives children the experience of life in a Jewish community and teaches them about Judaism" (Sales & Saxe 2002, p. 3). Energized and validated by findings about the Jewish impact of summer camps, the **Foundation for Jewish Camping**, formed by Rob and Elisa Bildner in 1998, has become the central, though not exclusive, address for national efforts on behalf of summer camping. The foundation has initiated programs to train camp directors and counselors, has advocated effectively for summer camping within the Jewish funding community and has guided camps in the areas of marketing, growth and strategic planning.
4. Adult Education: The National Jewish Population Survey (NJPS) 2000 reported that a surprising 24% of the 4.3 million more-involved Jews said that they had participated in an adult Jewish education class in the year prior to the survey. While some question the validity of this finding and note that this figure includes people who attended as little as one lecture, the optimistic finding is supported by increases in participation in three national adult education programs: (1) the **Florence Melton Mini-School,** now in 60 communities, enrolling 5,500 participants annually; (2) the **Me'ah** program, sponsored by the Hebrew College and the Combined Jewish Philanthropies of Boston, offered in six states in 2005–06 with an enrollment of 1,300 students; and (3) the Jewish Learning Institute of Chabad, with an enrollment in 2005 of 20,500 participants in 150 cities.

   The Melton program has been extensively studied by Grant, Schuster, Woocher and Cohen (2004). In a summary of the research Grant and Schuster described a series of impacts of the Melton program. According to the researchers, the key impact "has to do with how the learning enriches and shapes the meaning participants derive from their Jewish lives. While relatively few outward changes in religious behaviors can be observed, learners' inner Jewish lives appear profoundly changed" (Grant & Schuster 2003).

   Further evidence of philanthropic support for Jewish adult education is the significant growth of a myriad of Jewish websites, including **MyJewishLearning.com** and offerings from **Jewish Family and Life**.
5. Youth Groups: One of the most neglected areas of Jewish life during the past two decades, youth groups and programming for Jewish teens, has recently started to attract the attention of some American Jewish philanthropists at both the local and national levels. Locally, more than thirty-seven community-wide initiatives for Jewish teens like the Baltimore-based **Meyerhoff Teen Initiative** have been created in recent years. Nationally, BBYO is exploring creative and dynamic ways to engage under-affiliated teens in Jewish life by leveraging technology and addressing the core needs of American Jewish teens. At the same time, the major youth groups in North America, including BBYO, B'nei Akiva, NFTY, NCSY, Noar Hadash, USY and Young Judaea, have joined together in collaborative initiatives such as the Jewish Teen Leadership Summit and J-Serve, the Jewish Teen Day of Service, in an effort to reach out to the 80% of Jewish teens who are not currently involved in a youth movement. Sponsored by the Schusterman Family Foundation and spearheaded by PANIM: The Institute for Jewish Leadership and Values and the Jewish Coalition for Service, these projects

aim to find substantive ways for Jewish teens to work together across denominational lines and to involve their Jewish peers of all backgrounds in meaningful Jewish experiences inside and outside the youth group framework. Engaging Jewish young people during the teenage years is of critical importance, particularly as a recently released report by the Cohen Center indicates that 52% of Jewish communal workers began their work for the community while still in high school or college, typically working as camp counselors, religious school teachers, and youth group advisors, indicating the importance of these experiences to the Jewish community (Kelner et al. 2005, pp. 20–21).

6. Congregational Education: Another important area of Jewish education that has failed to receive adequate consideration is congregational education. Given the large numbers of Jewish children who will continue to be enrolled in congregational schools,[14] this is an aspect of Jewish education our community can no longer afford to overlook. Inspired and challenged by traditionally negative feelings toward congregational Hebrew schools, (Kadushin et al. 2001, p. 24; Kosman & Keysar 2000, 2004), the **Experiment in Congregational Education (ECE)** project of the Rhea Hirsch School of Education at the Hebrew Union College-Jewish Institute of Religion/Los Angeles and **Nurturing Excellence in Public Schools (NESS)** of the Auerbach CAJE in Philadelphia are working to enhance the effectiveness of synagogue-based education programs. Reimer of Brandeis University has also been engaged in an effort to target the various Hebrew high schools across the country through the Institute for Informal Jewish Education. Curricularly, both the Union for Reform Judaism and the United Synagogue for Conservative Judaism have recently released new curricula and other kinds of support for congregational education (see *http://urj.org/chai/samplelessons* and http://www.uscj.org/Project_Etgar_2005205964.html). In addition to the new curricula, the schools have benefited over the past five years from BabagaNewz, a Jewish values-based co-curricular suite of products that reaches over 30,000 congregational school students via school subscriptions. BabagaNewz is produced by **Jewish Family & Life**, with support from Avi Chai.

   In the last decade there have been two new and very different initiatives in congregational education. Chabad is becoming a significant provider of congregational education, a development that bears further attention. In a different vein, the Goldring/Woldenberg Institute of Southern Jewish Life has taken upon itself to aid congregational schools in communities too small to have a rabbi and/or professional educator. The Institute provides a standard curriculum as well as visiting educators and a national conference.

   The newest development to benefit the field of congregational education is the formation of the **Partnership for Congregational Education** announced in 2006. This partnership, led by a group of philanthropists and involving the professional staffs at the Jewish Education Service of North America and the Jewish Funders Network (JFN), seeks to spearhead the improvement of congregational education in North America.

   Currently the state of research into congregational education is weak, and serious questions remain about the efficacy of these once- or twice-weekly schools. However, the new energy and resources invested in the field are likely to produce richer and more comprehensive information in the coming years. According to one estimate, it would take only $60 million annually to significantly strengthen the congregational system in 200 communities across the country (Wertheimer 2001, p. 14).

7. Early Childhood Education. Spurred by recent research in the general field of child development as well as in this specific aspect of Jewish life (Beck 2002; Vogelstein & Kaplan 2002), in 2005 several philanthropists banded together to create the **Jewish Early Childhood Education Initiative (JECEI)**. This effort will spend $5 to $7 million over three years to create mod-

[14] There is no reliable data on the number of students in congregational schools, though there is much anecdotal evidence that supplementary school enrollment has declined over time. For example, in a forthcoming paper Wertheimer notes that over the past 3–5 years supplementary school enrollment in Philadelphia, Los Angeles and Cleveland has dropped precipitously—5.5%, 10% and 10.6%, respectively. However, enrollment in day schools and yeshivot has increased significantly over the last 20 years, leading the NJPS 2000–01 to conclude: "In short, over the past two decades, day school and yeshiva enrollments have grown dramatically, largely at the expense of supplementary Jewish schooling" (NJPS 2000–01, p. 15).

els of excellence in Jewish early childhood education, increase the number of families with children attending quality Jewish early childhood centers and raise the number of families continuing to engage in Jewish learning and living after pre-school.

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While these initiatives and many other comparable programs reflect positive trends in the fields of Jewish philanthropy and Jewish education, the sad truth is that no current data exist indicating a broad-based reversal of the Judaic abandonment sketched by NJPS 1990. To the extent the findings of the NJPS 2000–01 are reliable, they confirm the enduring impact of Jewish education, indicate that a larger number (albeit still a minority) of affiliated Jews are participating in Jewish education programs and show that the *increase* in the intermarriage rate has slowed. Overall, however, the Jewish community is not growing, enrollment in supplementary schools continues to decline and there are more American Christians than ever before who have at least one Jewish parent (Phillips 2004). Other studies report that when compared to the American Jewish community of 1990, Jews today are less likely to have large numbers of Jewish friends, identify less with the State of Israel and feel less responsible for other Jews (Cohen & Werthiemer 2006).

Evidence of a distressing lack of progress can also be found in the day school world. As successful as the effort to increase day school enrollment has been on a percentage basis during the past ten years, the total number of Jewish students in day schools remains very low. In fact, it is estimated that only some 40,000 non-Orthodox children attend day schools (Schick 2005), a figure that represents less than 10% of the total non–Orthodox student population).

Perhaps the most disturbing statistics of all, however, are those that plainly reveal the extent to which the organized Jewish community has yet to demonstrate the ability to raise the resources necessary to help the field of Jewish education stem the tide of assimilation despite the awesome wealth controlled by Jewish families and foundations. Indeed, recent studies reveal that the vast majority of Jewish philanthropists continue to direct significantly more of their philanthropy to secular causes and organizations than to Jewish ones.

In 1998 Wertheimer studied the 232 foundations in America that self-identified as giving at least $200,000 to Jewish causes and found that even these foundations gave nearly two-thirds of their funding—$487 million—to non-sectarian causes (unpublished). A 2003 report by Tobin and colleagues examined the 865 philanthropic gifts of $10 million or more made by American donors between 1995 and 2000 (Tobin, Solomon & Carp 2003). While nearly 25% (188 gifts totaling $5.3 billion) of the mega-grants were made by Jews, fewer than 10% of the gifts made by Jewish philanthropists were directed to Jewish or Israeli organizations. While these two studies do not represent the full panoply of Jewish giving—most of which is by individuals giving much less than $10 million—it seems likely that the data accurately capture the overall thrust of philanthropic giving by Jews.

There are multiple ironies in this situation. First, most Jews view the openness of American culture as America's greatest gift to the Jews; it has allowed us to succeed academically, socially and economically to the degree that Jews can be significant philanthropists. That very same integration into society has proven to be a double-edged sword, however, for many of these wealthy American Jews often no longer feel the ethnic or religious ties that have traditionally encouraged Jews to give to Jewish causes. Tobin captured this phenomenon when he wrote, "Jews are now so integrated into the American mainstream that *tzedakah* has taken on more of the character of American philanthropy, and will continue to do so, representing less the religious tradition of Jews and more the civil tradition of philanthropy in the United States"[15] (2003). Further evidence for the impact of assimilation is evident in the debate about whether all philanthropy—from supporting Jewish institutions to the opera—is "Jewish" if the donor identifies as a Jew.

Second, too many donors who have some attachment to the Jewish community argue that Jewish institutions do not deserve support because they fail to deliver excellence. While some Jewish edu-

[15] The evolution of Jewish philanthropy also reflects the emergence of several trends in American philanthropy generally—the decline of centralized or "umbrella" giving, the heightened demand by donors for increased accountability, an increased number of women of wealth, the need to nurture the "next generation" of donors and the staggering number of new not-for-profit organizations and foundations created each year.

cational institutions fall short in this regard for non-financial reasons, others are caught in a philanthropic Catch-22: the only thing standing between them and excellence is a lack of resources! The Jewish "cost of living" is already high and growing higher every year; congregational dues are rising, school tuitions are increasing and camping fees are climbing (Wertheimer 2001). Jewish institutions cannot strive for excellence if funders do not first ensure that the institutions can afford to keep their doors open.

In a sense, the organized Jewish community and those Jewish philanthropists dedicated to strengthening the entire field of Jewish education face two shared challenges. The first is finding ways to persuade those Jewish donors currently directing the vast majority of their giving to museums, universities and hospitals to make comparably sized grants to Jewish education. The second is making sure that Jewish education remains a top priority of the federation system. In addition to contending with the lure of secular institutions, supporters of Jewish education must also find a way to compete successfully with powerful advocates within the organized Jewish community for all kinds of other important causes—social services, seniors, Israel, culture, social action, public policy and more—to ensure that sufficient resources of all kinds are devoted to strengthening this critical element of Jewish life.[16]

Two recent programs, one initially launched by Avi Chai and the Jewish Funders Network and one by the Schusterman Family Foundation, may provide a small measure of hope. By offering matching grants to new donors to Jewish education (or to donors increasing their largest prior gift by 500%), the initial Avi Chai/JFN program induced over 80 donors to contribute a total of $3.4 million (which the program matched with an equal amount) to Jewish educational causes of their choice.

The program, now named MATCH, was repeated in 2005–2006, having been adopted by five philanthropists joining together to create a $5 million pool to match $10 million in new gifts to day school education on a 1:2 basis (see *www.dayschoolmatch.org* for a list of funders). PEJE also joined the program as an operating partner. The program was dramatically oversubscribed, yielding 334 applications for the benefit of 177 schools representing new gifts of more than $22 million. To avoid having to reject eligible applicants, the five initial donors increased their commitments and were subsequently joined by a group of PEJE partners and anonymous donors, bringing the pool of matching funds to $7.8 million. This was sufficient to match on a 1:2 basis the 296 eligible donors to 155 schools and eight day-school-related projects, a total of $18.1 million (gifts over $100,000 were matched at the maximum $50,000). The hope is that many of these new donors become ongoing supporters of Jewish education.

In 2004, and as an inducement for the federation system to raise more money for the Taglit/Birthright Israel program, the Charles and Lynn Schusterman Family Foundation issued a challenge to every federation in the United States and Canada. The foundation promised to give each federation $1 in unrestricted funds for every $2 by which that federation increased its funding for Taglit/Birthright Israel in the 2004–2005 fiscal year beyond its commitment in 2003-2004. According to the terms of the challenge grant, the new funds raised by federations could come either from their regular allocation or from individual donors in their communities. As a result of that challenge, the federation system contributed $7,200,000 to Taglit/Birthright Israel in 2004–2005, an increase of $2,700,000 over the $4,500,000 allocated in 2003-2004. The challenge grant was so successful, in fact, that the United Jewish Communities recently requested that each federation in its system increase its allocation to the Taglit/Birthright program by 50% over its commitment in 2005–2006, a step that would increase the total allocation from federations from approximately $5,000,000 to $7,500,000 per year.

Two additional philanthropic rays of hope for the field of Jewish education include the funding of the San Francisco-based Jim Joseph Foundation and the nascent Fund for Our Jewish Future.

[16] According to a 1999 report issued by the UJC/JESNA Task Force on Jewish Day Schools, "there are responsible leaders, including members of the Task Force, who believe that the high priority we urge for increasing financial resources for day school education justifies reallocating funds from worthy, but less urgent communal endeavors. We believe that this is a decision best made locally in light of specific conditions. But under no circumstances will reallocation of resources alone meet the need for significant expansion of funding for day schools, Jewish education in general, as well as the broad array of important communal needs."

In February 2006 the Jim Joseph Foundation received a bequest of $500 million from the estate of its founder and announced that it was "preparing to become the largest Jewish philanthropy exclusively focused on Jewish education of youth and children" (Gordon 2006). According to Alvin T. Levitt, longtime attorney and friend of Mr. Joseph, the late philanthropist felt that "developing programs for youth and children...would in the future strengthen the Jewish community in the United States" (Strom 2006).

In November 2003, speaking in Jerusalem at a plenary session of the UJC's General Assembly, Michael Steinhardt proposed "the creation of a Fund for Our Jewish Future devoted entirely to our next generation....[that] would invigorate the most important outlets of Jewish identity-formation from early childhood to days schools, camps and college programs." Steinhardt went on to say that he was "prepared to start [the Fund] with a gift of $10 million whose [sic] only condition is that it be no more than 10% of the fund" (Steinhardt 2003). While the Fund has yet to be established, a group of philanthropists have expressed interest in the concept and are committed to assuring its realization.

As useful as these programs may be, the financial resources involved are a pittance in the context of a multi-billion-dollar educational system. The only real chance to raise the money needed to maintain and enhance the system is for philanthropists and others who care about Jewish education to trumpet the field by articulating a compelling vision that captures the imagination of the most influential leaders of the Jewish community, the federations, the mega-donors and everyone else concerned about the Jewish future.

Once that occurs, the next step will be the formulation and implementation of targeted fundraising strategies designed to optimize the dollars raised from large and small contributors alike, ranging from very specialized appeals to mega-givers of both genders and young donors to broad-based giving programs. These strategies must be research-based and research-oriented, steeped with evaluative data proving the efficacy of the Jewish educational programs for which resources are being sought. When developing these strategies, both the immediate and long-terms needs of the Jewish institutions involved must be taken into account and adequately addressed.

Finally, every one of these efforts must also take into account the decentralized nature of the American Jewish community. To paraphrase the famous Thomas ("Tip") O'Neill comment about politics, all Jewish education is local, and the success of the field over the long run will depend on its ability to meet local needs primarily with local funding, both from the federation and from other sources.

* * *

The following policy implications and recommendations emerge from this review of Jewish educational philanthropy since 1990.

1. **Sustainability of Funding:** The mutual ferment in the Jewish educational and philanthropic communities has yielded significant progress in the past fifteen years. However, few of the new programs or educational enhancements (e.g., Birthright Israel, PEJE, DeLeT) have thus far developed sufficiently broad bases of support to ensure long-term continuity. As a result, there is a risk that if the current funders lose interest or capacity, the progress in the field could dissipate. To some degree, this is a built-in weakness of the entrepreneurial style of philanthropy as compared with the slower consensus-building approach. Funders, federations, schools and organizations should work together to build endowments and fundraising capacities within both Jewish educational institutions and the new non-profit organizations that have been established to support them. The current generation of donors should also seek to engage younger funders in the programs so that the programs outlive the mega-donors who have been fixtures in our community in the past two decades.
2. **Expanding the Circle of Funders for Jewish Education:** As noted earlier, Jewish education in all of its forms requires the support of a larger number of philanthropists. However, bemoaning the problem is not likely to solve it. The immediate need is to understand the thinking of donors not yet committed to Jewish education and to construct arguments for Jewish educa-

tion using language and ideas that are more responsive to the concerns of these donors. There should be more settings in which Jewish education philanthropists collaborate with other givers so that there can be more peer-to-peer marketing. The Jewish Funders Network can be helpful here; another useful model may be found in Natan, a New York-based network of funders under forty-five whose funding is focused in the areas of Jewish education and identity.

There also remains a need for advocacy within the federation system, particularly to the lay and professional leaders responsible for guiding the use of endowment funds. Many of the endowments are in the form of donor-advised funds or supporting foundations, and advocates (especially alumni) of powerful Jewish educational experiences on the local level should join with federation to educate the donors and their children about the important opportunities in Jewish education philanthropy.

3. **Quantifying the Need**: While it is evident to all that the underfunding of Jewish education is in large part responsible for deficiencies in both quality and recruitment, there has not yet been a comprehensive effort to quantify the need. What will it cost to offer at an accessible price a full range of high-quality Jewish education programming—day schools, camps, Israel trips, campus programming, summer camping, youth groups, adult education, congregational schools and early childhood education? This kind of quantification is necessary for both planning and advocacy.
4. **Government Support:** For decades the organized Jewish community stood firmly behind a high wall between church and state in America, arguing against any kind of government support for Jewish education. In recent years there has been a shift in the thinking in some circles, with the result that support for voucher or tax credit programs for the benefit of Jewish day schools has become a mainstream, if still minority, position. (It may be a majority position among day school advocates.) Government programs of one kind or another exist in Milwaukee, Cleveland, Florida, Arizona and Pennsylvania. Issues of both policy and law continue to be debated and litigated. In light of the difficulties to date in attracting a dramatically larger group of funders to support Jewish education and the critical need for strong Jewish education to ensure the continuity of American Jewry, the issue of government support should be revisited. The fundamental question, framed from the narrow Jewish perspective, is whether Jews have more to fear from limited, even-handed government support for religious education than from the Judaic abandonment resulting from the limited enrollments in Jewish schools.
5. **Federations and the Future:** Will federations continue to be dominant features of Jewish life in the coming decades, or will the energy of private philanthropy lead to the continuing decline in both resources and influence of the federated system? While some would not mourn the demise of the federated system, federations play a critical role in raising funds for the general operating expenses of the range of low-visibility yet essential Jewish institutions such as homes for the aged and Jewish family service providers. Because these institutions are critical to Jewish life, philanthropists who practice "venture philanthropy" should also be helping to plan for the future organization of an American Jewish community that is capable of supporting these institutions. Similarly, as Edelsberg has argued, federations must imagine a future that is both more participatory and focused on achieving outcomes. This future would include "a rich tapestry of nationally networked donor advised funds, giving circles, youth philanthropies, social venture partners, women's foundations and supporting organization" (2004, p. 36).
6. **Linkages:** Most of the programs described in this report hone in on one or another type of Jewish education, with some projects for day schools, others for camps and yet others for Israel trips. Similarly, the Jewish educational institutions see themselves autonomously. A new report from a research team led by Wertheimer, entitled *Linking the Silos: How to Accelerate the Momentum in Jewish Education Today* (2005), argues compellingly that the community should have the overarching agenda of linking the different types of Jewish education both vertically and horizontally. This is because all of the data show that participation in multiple Jewish

education experiences is far more likely to generate enduring Jewish commitment. Vertically, families sending their children to Jewish pre-schools should be encouraged to continue on to Jewish elementary schools, and bar/bat mitzvahs should be encouraged toward Jewish high schools (day or supplementary). Horizontally, Jewish children should be encouraged and perhaps even provided incentives to participate in all of—not just one of—the modalities: summer camps, youth groups and Israel trips. Adult education programs should inform parents of the benefits of giving their children comprehensive Jewish experiences. Linking the different Jewish educational institutions in this way runs contrary to long-standing culture and will require the use of financial leverage as well as advocacy and training.

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As noted above, the dramatic expansion of Jewish educational philanthropy, much of which has been accompanied by evaluation and research, has yielded an enormous amount of quantitative and qualitative data. Currently, even where the research is in the public domain, the sheer volume and complexity of the material makes it difficult for funders and educational institutions to draw appropriate lessons from past experience. The fragmented nature of the American Jewish community also creates substantial informational challenges. Wertheimer has noted the absence of "a clearinghouse of information, let alone a sustained process for gathering data on the field"[17] (2001, p.3; Prager, 2005). Without a better system for making current and new data useful, there is a great risk that critical information will gather dust on shelves.

There is another concern. Much of the research being conducted today is commissioned by philanthropists in connection with funded programs. However subtly, researchers no doubt feel pressure to support the philanthropists' desires. We should ensure that research is based on a need to know rather than a need to prove and that the findings receive critical scrutiny.

Finally, there are many studies showing that Jewish education enhances Jewish identity, and that more intensive experiences and those of longer duration have a greater impact than lesser ones (Cohen & Kotler-Berkowitz 2004, p. 18). However, we lack basic data about enrollment (other than in day schools), faculty turnover, training, and compensation, institutional finances and participant/family motivation for much of our educational system. The field requires a group, or an academic discipline, that conducts primary research on the essential facts about Jewish education in order to ensure that both philanthropists and professional leaders make wise decisions based on actual facts.

The Jewish community today has many strengths—energy, financial wealth, and creativity. The question is whether these resources can be harnessed for a compelling marketing and fundraising campaign that will provide the capital needed to secure a vibrant and first-rate Jewish educational system to educate the next generation of American Jews. This is surely the most critical question facing the Jewish community today.

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Edelsberg, C. (2004). "Federation Philanthropy for the Future." *Journal of Jewish Communal Service* 80 (1), 31–38. In this article Edelsberg, formerly the vice president and director of endowments and foundations at the Jewish Community Federation of Cleveland and currently the executive director of the San Francisco-based Jim Joseph Foundation, addresses the need for federations to become as effective at grantmaking as they have historically been in raising money for the Jewish community.

Saxe, L., Sasson, T. & Hecht, S. (2006). *Taglit-Birthright Israel: Impact on Jewish Identity, Peoplehood and Connection to Israel.* Waltham, MA: Brandeis University, The Maurice and Marilyn Cohen Center for Modern Jewish Studies. This work is the latest in a series of longitudinal studies of the Taglit-Birthright Israel program, one of the most rigorously evaluated programs in the Jewish world. According to the authors, the findings in this report, like those in earlier studies, "are dramatic in the extent to which they suggest nearly universal positive evaluations."

[17] The new Steinhardt Social Research Institute at Brandeis University will collect, analyze, and disseminate data about the Jewish community in the United States and plans to address this void in the Jewish community. Similarly, the North American Jewish Data Bank is attempting to collect all quantitative Jewish research studies undertaken in North America, to make the research reports and data sets available on the Internet.

Tobin, G. A. (2001). *The Transition of Communal Values and Behavior in Jewish Philanthropy.* San Francisco, CA: Institute for Jewish & Community Research. Tobin is widely recognized as one of the most astute observers of the trends in Jewish philanthropy, especially insofar as the largest donors and private foundations are concerned. This work explores "the guiding principles, beliefs and myths that define the [Jewish] philanthropic system" and suggests how that system should reorient itself in order to attract greater financial support for Jewish causes and institutions.

Tobin, G. A., Solomon, J. R. & Karp, A. C. (2003). *Mega-Gifts in American Philanthropy,* San Francisco, CA: Institute for Jewish & Community Research. Starting with the definition of a "mega-gift" as one of $10 million or more, the authors examine the giving patterns of "mega-donors" in both the Jewish and general communities during the period between 1995 and 2000. Among their findings was that only a few mega-gifts from Jewish mega-donors went to Jewish organizations or institutions during that period. Anecdotal evidence suggests that while the amount of mega-philanthropy in the Jewish world has improved since that time, Jewish mega-donors still give an overwhelming proportion of their mega-gifts to secular organizations, especially to institutions of higher education and medical research.

Wertheimer, J. (2001). *Talking Dollars and Sense About Jewish Education.* New York: American Jewish Committee and Avi Chai. This paper begins the process of quantifying the needs in the fields of day schools, supplementary education and some forms of informal education by gathering existing data and projecting costs for expanding and enhancing the field.

Wertheimer, J. (2005). *Linking the Silos: How to Accelerate the Momentum in Jewish Education Today,* New York: Avi Chai. This summary synthesizes the results of a multi-part research project examining family decision-making about Jewish education. It argues that "leaders concerned with Jewish education must find ways to build institutional linkages between various formal and informal educational programs, between families and schools, between educators in various venues, [and] between the key communal agencies engaged in support of Jewish education." The reports from the individual research studies will be collected in a forthcoming book.

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