

THE JEWISH WORLD IN FLUX: Our Changing Donors, Synagogues, and Profession

November 6, 2006

**URJ Development Professionals Meeting
Temple Oheb Shalom—Baltimore, MD**

Amy L. Sales and David A. Mersky

**Fisher-Bernstein Institute for Jewish Philanthropy and Leadership
Brandeis University**

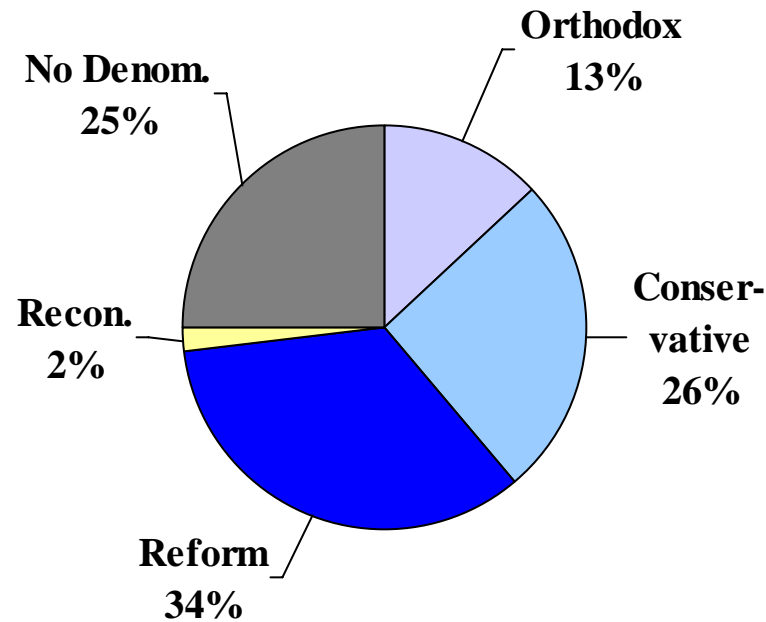
Demographic Trends

- **Non-denominationalism**
- **Liberalism**
- **Diversity**
- **Regionalism**
- **Universalism**
- **Niche identities**

Non-denominationalism & Liberalism

Reform Market Share

Personal Identity



From NJPS 2000

Holding On to Your Share

Current				
Raised	Orthodox	Cons.	Reform	No Denom.
Orthodox	81	21	25	18
Cons.	9	65	9	10
Reform	4	6	57	16
Secular	6	7	9	55
TOTAL	100	100	100	100

Diversity

Non-Jews in Our Midst

In-marriage:

74% of those who identify as Reform Jews.

84% of those who belong to a Reform temple.

On the decline.

Married...	Reform-identified	Reform-affiliated
Before 1970	95	96
1970s	75	90
1980s	66	72
1990s	55	73

Denomination Matters

	Orthodox	Cons.	Reform	No Denom.
In-married	96	87	74	61
Jewish social networks	90	68	56	46
Sense of peoplehood	91	74	56	39
Synagogue member	86	61	47	15

From NJPS 2000

Denomination matters... when it comes to money

	Orthodox	Cons.	Reform	No Denom.
Contributed to Jewish causes in past year	80	64	47	23

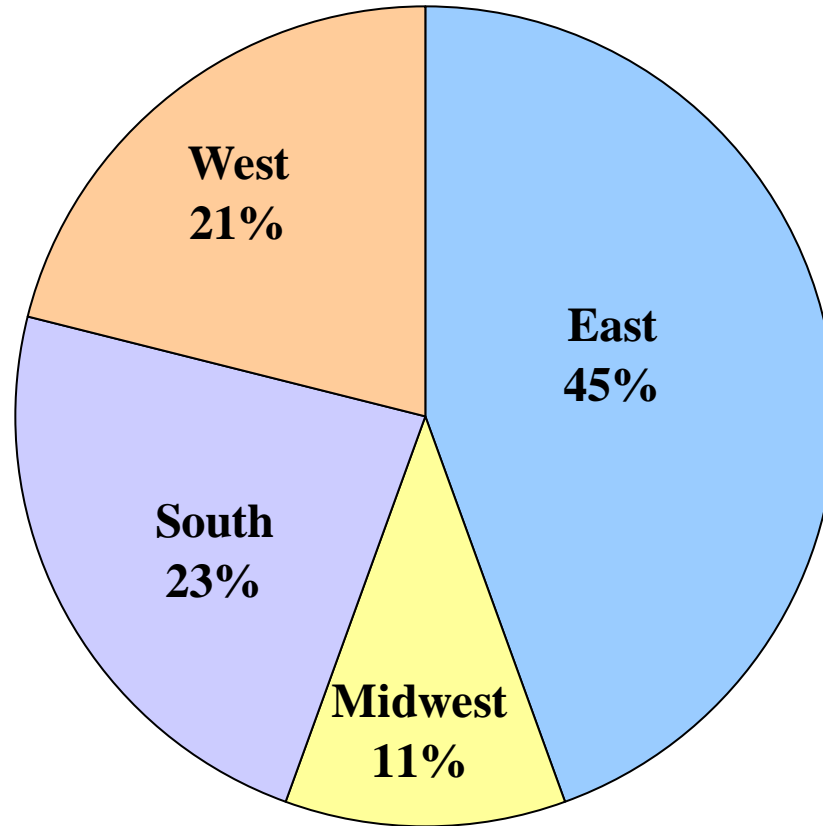
Proverbial “Ball of Wax”

From NJPS 2000

Universalism

**More people give and give more
to non-Jewish causes
than to Jewish causes.**

Regionalism



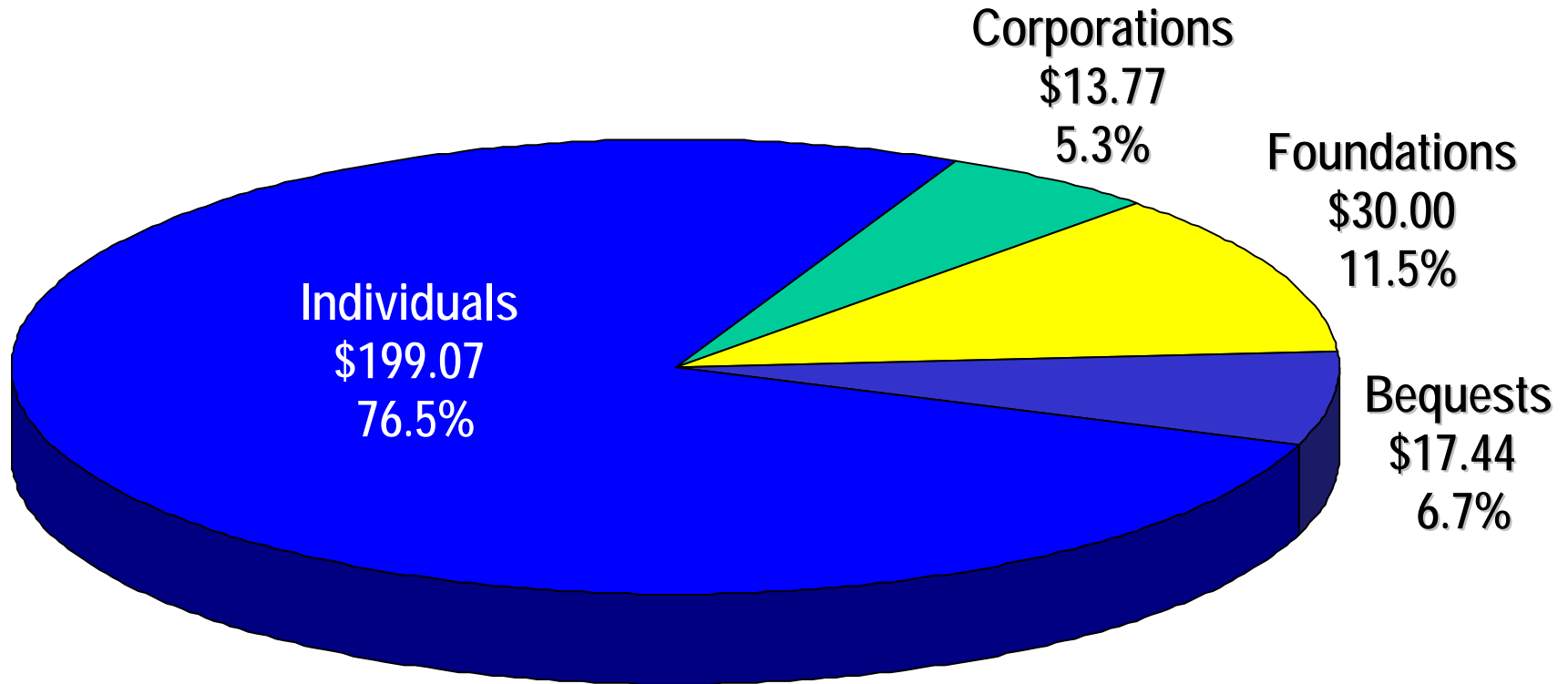
From NJPS 2000

Where would you most like to be raising money?

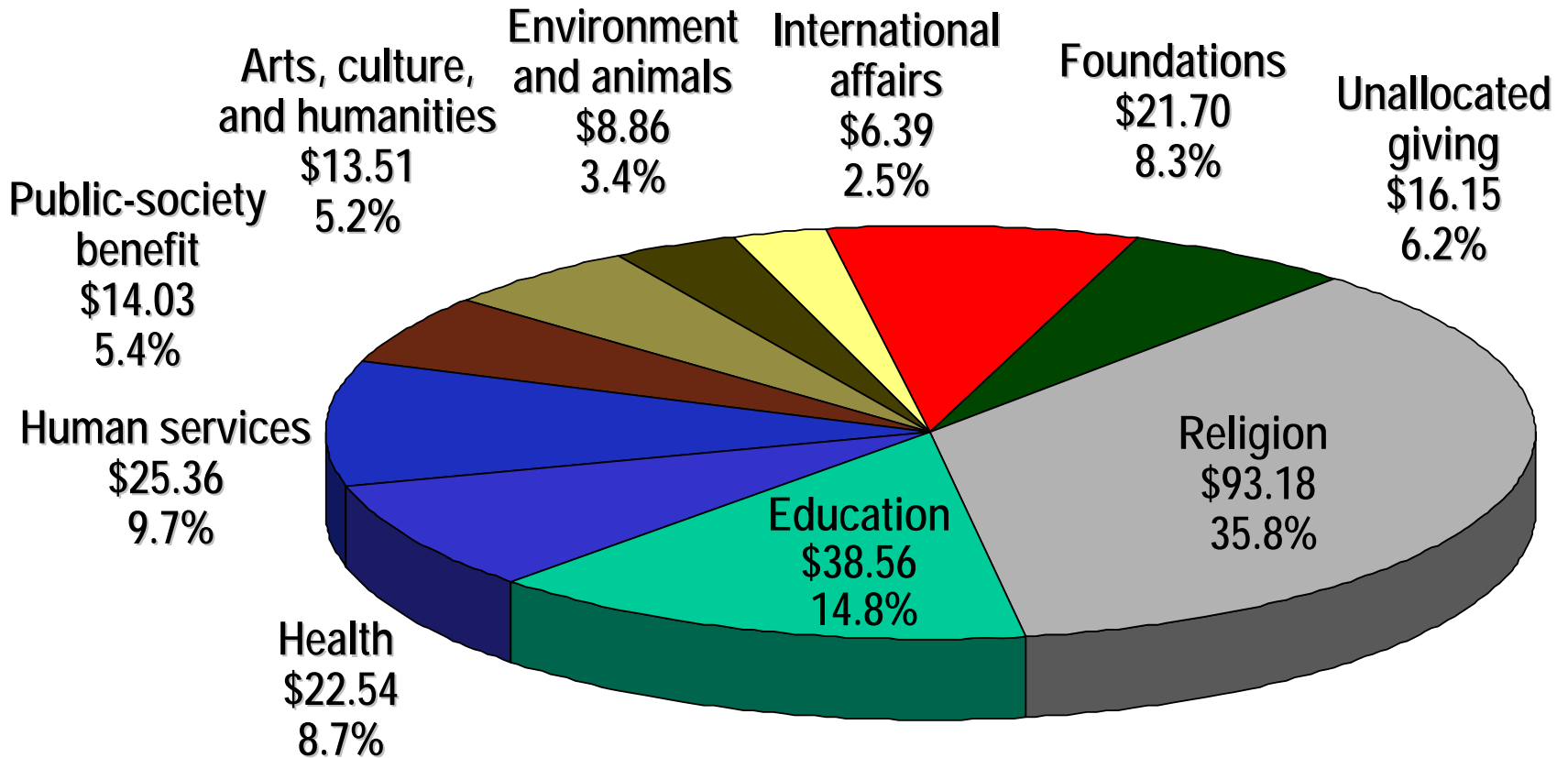
	North East	Mid West	South	West	Total
Fed.	\$90	\$106	\$105	\$62	\$88
Other Jewish	\$265	\$180	\$221	\$189	\$225
Non- Jewish	\$313	\$382	\$328	\$401	\$347

The State of Philanthropy in America Today

2005 CONTRIBUTIONS: \$260.28 BILLION BY SOURCE OF CONTRIBUTION



2005 CONTRIBUTIONS: \$260.28 BILLION BY TYPE OF RECIPIENT ORGANIZATION



Q:

How do you get
your piece of
the pie?

A:

- Understanding the New Donor
- The New Reality: Creating a Culture of Giving

THE CHRONICLE OF PHILANTHROPY

GIFTS & GRANTS

- From the issue dated November 25, 2004
 - **Jewish Giving's New Era: Established Groups Face Growing Competition for Funds**
 - **U.S. Jewish Groups Ponder How Much Money to Send to Israel**
 - **Jewish Federations Try New Ways to Reach Out to Younger Donors**

Conventional Wisdom: The Seven Faces of Philanthropy

- framework for understanding donors
- characteristic and distinctive ways a donor approaches philanthropy
 - set of typical attitudes and beliefs
 - range of considerations
 - process of evaluation
 - style of involvement with nonprofits
- one set of *dominant* motivations even though any donor also feels others

Conventional Wisdom: The Seven Faces of Philanthropy

- Communitarian: Doing Good Makes Sense
- Devout: Doing Good is God's Will
- Investor: Doing Good is Good Business
- Socialite: Doing Good is Fun
- Altruist: Doing Good Feels Right
- Repayer: Doing Good in Return
- Dynast: Doing Good is a Family Tradition

Why Aren't Jews Giving to Jews

“Mega-Gifts in American Philanthropy”
(Tobin, Solomon, & Karp)

- Between 1995 and 2000,
 - \$5.3 billion given by Jewish mega-donors
 - 123 donors gave 188 gifts of \$10 million in one year
 - only \$318 million—6%—to Jewish causes
 - 18 (9.6%) went to Jewish organizations

Why Aren't Jews Giving to Jews

Generosity of American Jews is undisputed.

- Jews are 1.6% of U.S. population
- 24.5% of all American mega-donors are Jewish
- largest givers prefer to start their own projects
 - Spielberg
 - Steinhardt
 - Bronfman
 - Schusterman

Why Aren't Jews Giving to Jews

- “Many Jewish institutions are not able to absorb very large gifts”
- “Are we even asking [for the multimillion dollar donations]?”
- “Donors see their contributions as (social and cultural) investments, not as gifts, and demand solid business plans from the soliciting institutions.”

Why Aren't Jews Giving to Jews

- Jewish groups use old and tried (or tired) methods
- Traditional fundraising pitches may still work among older Jews, but turn off younger generation
- For younger philanthropists, their giving to any worthy cause springs from their Jewish upbringing and tradition. To their parents, Jewish philanthropy means giving to organizations with 'Jewish' or 'Israel' in the name.

The New Jewish Donors

- Do not believe that Jewish community can steward gift as other institutions can.
 - Secular institutions = professional
 - Jewish organizations = “haimish”
- Want impact beyond Jewish world.
- Want acceptance in outside world.
- Do not want to look “too Jewish.”

The New Jewish Donors

- Non-Jewish world respects philanthropy
- Perception of Jewish entities:
 - *Tzedakah* as obligation
 - narrow and judgmental
 - not enough donor recognition

Defining Jewish Giving

Superficial classifications:

- any money directed to a nonprofit with the word “Jew” or “Israel” in the title.
- any cause a Jewish philanthropist gives to.

Defining Jewish Giving

- Making someone self-sufficient is highest level of charity (Maimonides)
 - Fund a job-training program in the inner city, is that Jewish giving?
 - Is it only Jewish giving if the program is delivered by a nonprofit with a Jewish name?
 - What if it is a non-Jewish nonprofit but it is run by a deeply Jewish professional?
 - What if it is a “Jewish” nonprofit but with non-Jewish staff?

Defining Jewish Giving

- Jewish giving is *that which advances the Jewish agenda, and that agenda cannot be limited to “continuity.”*
- “If you don't give to us, your kids may not be Jewish.”
- Young ask why be Jewish.
- “Shop at our store or our store won't be around.”
- Prophets didn't travel through ancient Israel preaching continuity, rather they *gave us a vision of a better world, a more perfect society, and told us how we could help shape it = Tikkun ‘Olam*

Synagogue Trends

- **Building mania**
- **Synagogue change initiatives**
- **Jewish journey versus community building**
- **Congregant development**
- **Dysfunctional governance**
- **Perpetually failing schools**

Jewish Journey vs. Community Building

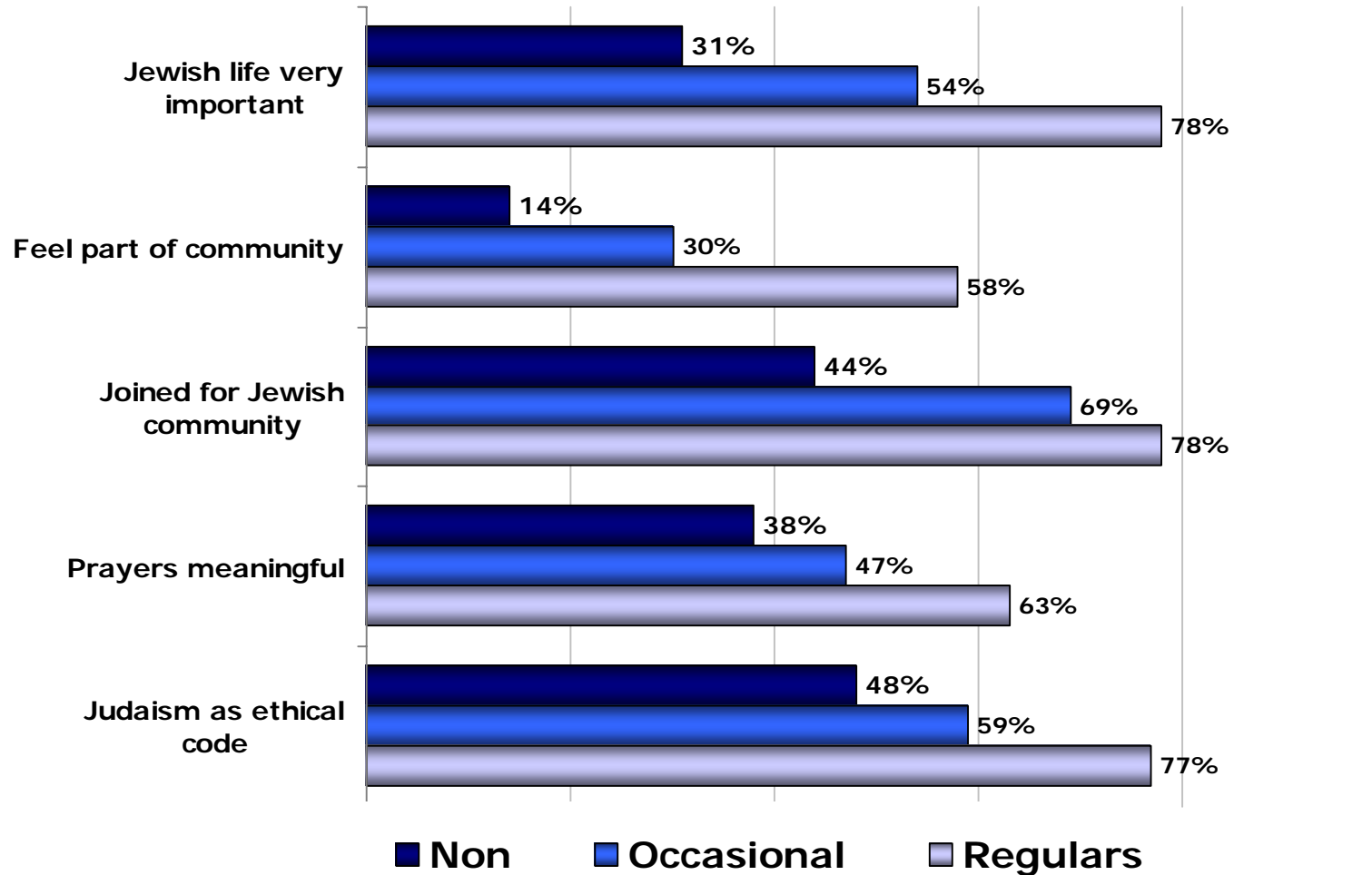
“Very much” give meaning to synagogue membership

High holiday services	79%
Lifecycle events	67
Children’s education	52
Family activities	28
Regular worship services	25
Adult ed/Torah study	22
Social/cultural activities	22
Giving or receiving care	19
Volunteerism/social action	18

*Westchester Congregation Study
n=1,294 congregants in 11 synagogues*

Congregant Development

Concentric Circles of Membership



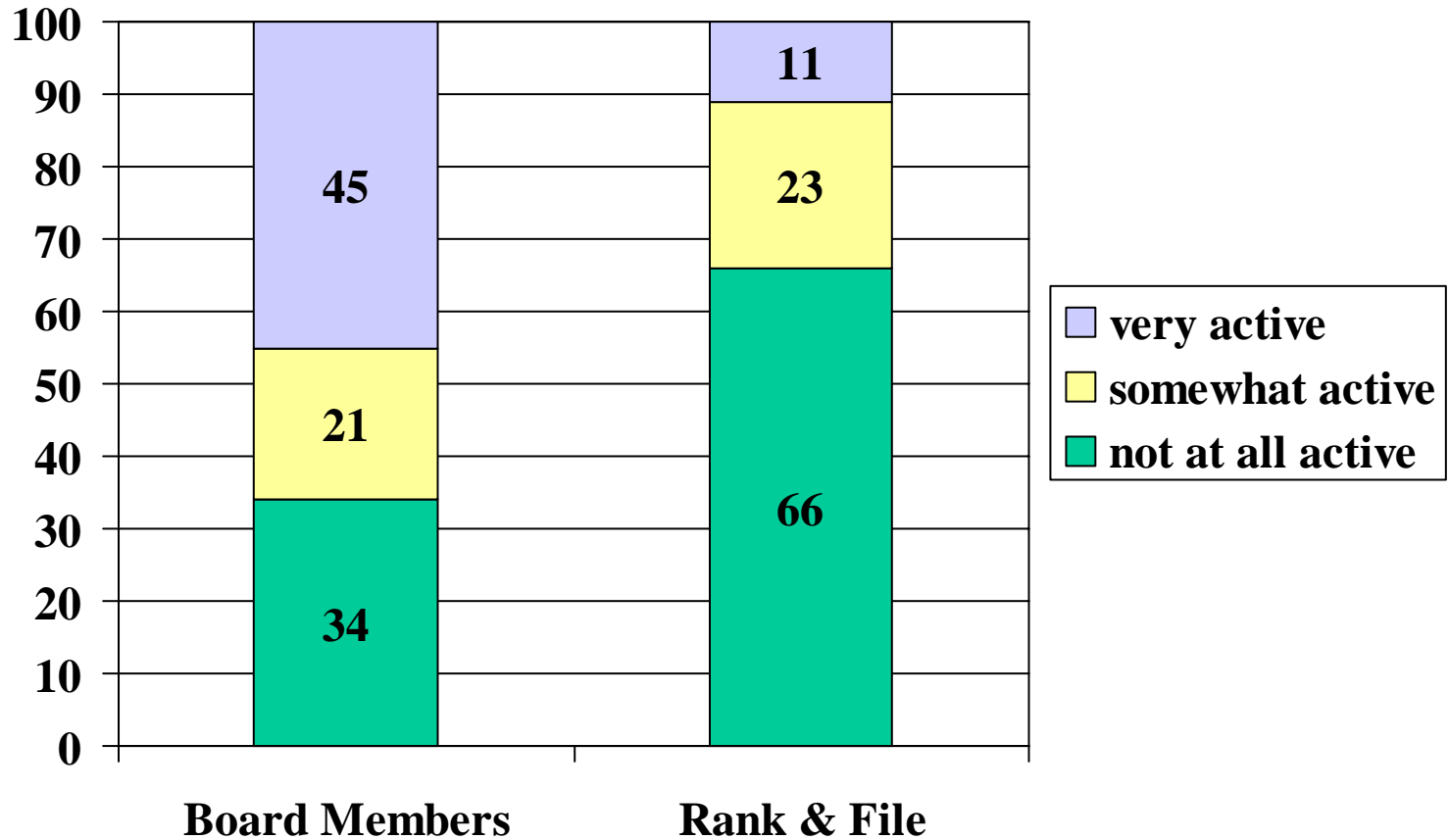
From *Project Soul*, 1999

Governance

Presidency	<i>Number of Congregations</i>
Formal qualifications	4
Term limits	12
Formal succession plan	3
Board Members	
Formal qualifications	4
Term limits	14
Formal obligations	8
Formal orientation	11
Board retreat (in past 3 yrs)	6
Annually assess own performance	8
Staff	
Formal performance appraisal process	7

From *Growing Synagogues*, 2006
Based on governance practices in 22 synagogues

Leadership by Active Core



From *Westchester Congregation Study*, 2004

Looking Ahead

- Role of the Movement
- Egalitarian nature of synagogue
- Creating a Culture of Giving in the New Reality

Old Reality vs. New Reality

- Scarcity and Survival
 - Depression mentality
 - “There is never enough.”
- Abundance
 - “How do I connect?”
 - “Why don’t they ever ask me for more?”

Old Reality vs. New Reality

Successful congregations step into new reality

- Passion about the work
- How the work changes lives
- Facts about the “problem” and congregation’s success in solving it
- Gap between “now” and what it will take to fulfill the mission
- Your plan and their role

New Reality: Cherished Values and Passion

Cherished values and ideals

- Love of all Jews—*ahavat Yisrael*
- Respect for all—*k'vod ha'briot*
- Drawing people near—*keruv*
- Multiple valid ways—*shiv'im panim la-Torah*
- Walking humbly—*tzneut lekhet*
- Meeting face-to-face—*panim el panim*
- Joy of doing Jewish—*simcha shel mitzvah*

Creating a Culture of Giving

- Community building initiative
- Bridge the gap between regulars and others
- Methodology to respond to aspirations
- Respect for diversity and individuality
- Draw people closer and closer
- Face-to face encounter
- Joy of living and giving

אָבֵר רַי יוֹסֵי: יִהְיֶה חֵלְקִי מִגְּבוּלֵי צְדָקָה וְלֹא מִמְּחֻלְקֵי
צְדָקָה לִשְׂמַח מִמֶּנּוּ.

Rabbi Yossi said:

May my portion be with
those who collect *tzedakah*
and not with those who
distribute it.

--*Shabbat 118b*