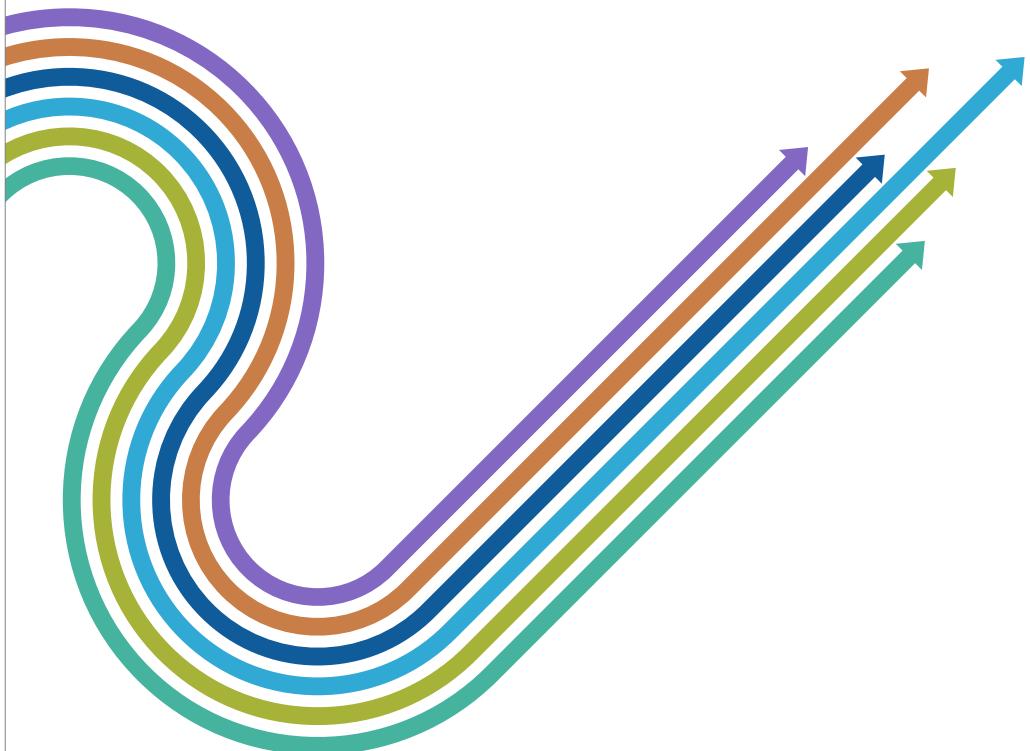


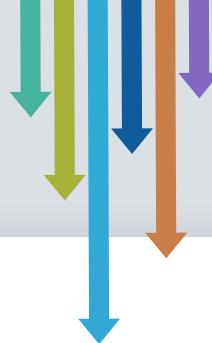
# YOUR JEWISH PHILANTHROPY ROADMAP



A resource produced by  
**JEWISH COMMUNAL FUND**  
and  
**JEWISH FUNDERS NETWORK**

**Jewish Communal Fund** facilitates and promotes charitable giving through donor advised funds, and is one of the largest and oldest non-commercial DAF in the nation. JCF manages approximately 3,000 funds valued at \$1.2 billion. Historically, our fund holders have recommended an average of \$280 million in grants to sectarian and nonsectarian organizations responding to needs in every sector. We enable individuals and families to achieve their philanthropic goals simply and efficiently, with full confidentiality and maximum choice. JCF has consistently received the highest rating from Charity Navigator and ranked in the top fifty on the Chronicle for Philanthropy Top 400 list of charities. A JCF fund is a simple and cost effective way to manage your charitable giving, for philanthropists large or small. For 40 years, JCF has served multiple generations of high-net worth families, providing educational resources and tools, foundation to DAF conversion, and legacy and succession planning. JCF offers a variety of special services and investment options for high net worth individuals and families including philanthropic education, facilitation of intergenerational philanthropy, connection to carefully selected philanthropic advisors and the ability to accept a wide range of real property and illiquid assets as contributions to a donor advised fund. JCF helps people make their charitable giving more efficient and strategic.



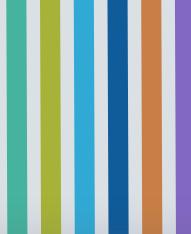


## INTRODUCTION

*Tzedakah* is often translated as “charity,” but it’s much more than that. Literally, the word means “justice.” Jewish tradition considers giving an act of justice and our way of creating a fairer world. Giving is—for Judaism—a basic obligation, one of the main tools we have to change reality and manifest our deepest human values.

However, giving wisely and with impact can be challenging. Because it is central to who we are, giving in an effective manner is critically important. But how to go about doing this? Where to give? Which tools to use? When confronted with these challenges, we soon realize that the roadmap to effective philanthropy requires work and engagement. Judaism provides guidance to help us navigate our philanthropic journey.

This booklet is the result of a partnership between Jewish Communal Fund (JCF), Jewish Funders Network (JFN), and Rockefeller Philanthropic Advisors (RPA). RPA has created a series of booklets designed to guide funders in their philanthropic journey. The booklets are concise, useful tools for those seeking to become better funders and more effective philanthropists. To respond to the particular needs of their members, JCF and JFN have added their unique expertise to make this introductory booklet. The core universal themes and values of this resource have been retained and then enhanced by the stories from individuals in our own community. The questions and commentary are attuned to the unique realities of the Jewish community here and in Israel.



A book is a living thing in Jewish tradition. Books are enriched by the comments, the questions, and the criticisms of the reader. In this spirit, we invite you to share your thoughts with us and to enrich this material with your own experiences. This book is a tool to help you make your philanthropy more strategic and intentional. As Hillel the Elder said, “This is the essence; now go and learn.”

JFN and JCF are here to help you and your family throughout your philanthropic journey.

Thank you to Rockefeller Philanthropy Advisors for their role in creating this guide. Thanks also to Mark Pearlman and Sinai Live Books for their generous sponsorship of this guidebook.

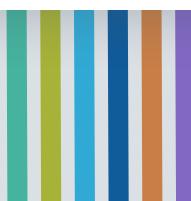
In the pages that follow you will find pertinent questions to help you begin to navigate your philanthropic journey. Should you decide to learn more, additional references, resources and information that can assist you are available from:



[jfunders.org](http://jfunders.org)  
212.726.0177

[jcfny.org](http://jcfny.org)  
212.752.8277

[rockpa.org](http://rockpa.org)  
212.812.4330



# SIX MILESTONES

The objective of this guide is to outline key milestones on your philanthropic journey and to introduce you to a process that can help you develop your own giving plan.

The Roadmap is a series of questions with options, not a set of answers. We recommend that emerging as well as experienced philanthropists consider working through these questions with their families, and where appropriate with advisors, as a way to create not only a strategic framework, but an outline of how to operate their giving plan.

-  1 Why are you giving?

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-  2 What do you want to achieve?

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-  3 How do you think change will happen?

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-  4 How will you assess progress?

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-  5 Who will join you?

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-  6 What are the unique considerations for Jewish philanthropists?

## *Motivations*

People have many motivations for philanthropy, some of them seemingly inconsistent. Motivations for giving often change over time and with experience. But unless it addresses the needs that drive these motivations, a giving program is unlikely to be sustained or successful. And because some motivations may be mutually exclusive, or at least hard to integrate, they should be clearly articulated so that decisions can be made about how to balance various priorities. Many philanthropists want their values to inform their philanthropy.

Identifying motivations makes it easy to clearly include them in giving strategies and assessments.

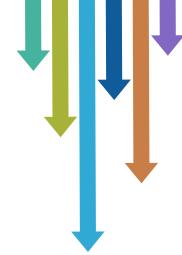
**Here is a list of categories, not exclusive by any means, to help you begin to think about your own motivations:**

### ► **Jewish Tradition**

Many philanthropists center their giving around their spiritual beliefs and/or religious practices. They support not only their house of worship but also organizations and causes that they learn about through their community of faith. Our Jewish tradition and values speak to the importance of tzedakah, or acts of justice. The Torah tells us, “You shall surely open your hand to the poor and the destitute of your land.” The Jewish community has a long tradition of establishing institutions to provide for those in need. It is worthwhile to take the opportunity to explore how your Jewish values can inform and guide your charitable giving.

### ► **Heritage**

Ethnic or national identity can create a set of important values as well as an impetus to support and honor that heritage. “Diaspora” philanthropists, who seek to help the communities and country from which their families emerged, are a global force moving billions of dollars. How do you view the relationship between your heritage and your philanthropy? For example, immigrants who made good and achieved success may then turn to supporting other immigrants regardless of their specific background or they may support social and cultural institutions that promote and preserve their heritage.



## ➔ Family

One of the strongest motivations for charitable giving can be to honor and appreciate our ancestors. Our upbringing imprints values and experiences upon us which we often seek to reinforce through our giving. Family often paves a legacy that generations honor and follow. Conversely, there can be a reaction against family traditions and established giving practices. Despite familial influences, new generations with a fresh set of philanthropic principles may break into different areas of giving. Others may incorporate both traditional giving patterns and new funding areas.

## ➔ Legacy

Those motivated by legacy seek to influence the future by using philanthropy as their public commitment to making a better world. Legacy philanthropists may want to be remembered for more than financial success. Other legacy philanthropists may want to create a family culture of generosity and public service. They seek to pass down values as well as resources to the next generation. Having their family involved in philanthropy is deeply meaningful to them.

## ➔ Experience

Inspiration comes from an individual's own life. People who have benefited from scholarships or consider education as the foundation of their success often wish to create that opportunity for others. Those who suffered, or had a loved one suffer, from a serious medical issue can be inspired to help find a cure. Those deeply moved by the arts may wish to provide others with this experience of beauty. Those who travel widely may see opportunities to change challenging conditions they confront abroad.

## ➔ Analysis

Analysis-driven philanthropists deemphasize the personal in their articulation of philanthropic goals. Instead, they try to objectively define the biggest issues that can be successfully addressed with philanthropic resources. The terminology of investing or of the methodology is often framed by how the philanthropists define their motivations as well as their goals and strategies.

## Giving Shaped by Jewish Values and The Syrian Community

For David J. Hidary, charitable giving is about strengthening one's community. He has played a leadership role in many Jewish communal institutions that serve the Sephardic-Syrian population in Brooklyn and the wider Jewish community. "I've always been involved in community service," he says, describing himself as a pro-active person. "The Syrian community has a sense of togetherness and tradition that we carry on from Aleppo, Syria, where both of my parents were born. It is part of who we are to build our community and to serve the Jewish people in Israel and in the many countries of the diaspora."

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*"I learned in my teenage years the mitzvah of tithing—giving 10% of one's income to charity—and I have followed that rule all of my life."*

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Synagogues and Jewish schools are causes that have always been close to his heart. As a teenager, he served as president of the Young Shaare Zion Synagogue. While attending college, he co-founded the Brooklyn chapter of the Mizrahi Hatzair Youth Zionist organization, introducing his friends to the concept of a "shabbaton" and to popular Israeli songs and dances. "It gave me a new perspective on participating in Jewish life," he says. He was instrumental in opening the Sephardic High School, where he served as president for a decade, and was a founder of the Sephardic Community Center, a UJA-Federation of New York agency, and actively served on the board for 25 years.

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The Syrian community is very generous when it comes to charity. The late Isaac Shalom, a prominent Syrian businessman and philanthropist who founded Magen David Yeshivah in Brooklyn as well as Ozar HaTorah, a network of schools in the Middle East and North Africa, modeled what it means to be a leader and taught the community how to give. “I learned in my teenage years the mitzvah of tithing—giving 10% of one’s income to charity—and I have followed that rule all of my life,” he says.

Hidary, a JCF fund holder and trustee, currently serves as a board member and co-chair of the Sephardic Campaign for UJA-Federation of New York. He also served on the Sephardic Scholarship Fund, and on the boards of the JCRC and the Sephardic Community Federation. “I give a large share of my charity dollars to organizations I am involved with, to set an example and encourage others.” He also supports secular organizations such as NYU Medical Center and many charities that care for children with special needs.

In recent years, Hidary helped establish the Kings Highway Beautification Association (KHBA), a civic organization that cleans up and beautifies the commercial area in the neighborhood. “The streets now look cleaner and more charming,” he says. KHBA also interacts with the administration of P.S. 215 to deal with community-wide local issues. He says, “Maintaining positive communal relations and improving the quality of life are essential.”



## Your Goals

In our experience, philanthropists make the most sustained and successful contributions when they focus on issues that connect directly to their motivations and convictions. **We recommend a three-step process.**

### STEP 1: FRAMING THE ISSUES

Different lenses on the world help us focus and sort what we see. Here are a few general scopes to get you thinking:

#### → Big Challenges

Examples might include poverty, disease, education, climate change, etc.

#### → Specific Challenges

Most philanthropists will drill down from the big challenge to further define their focus. For instance, someone interested in education might look closely at early childhood learning centers. Someone interested in children's health might look at nutrition programs to increase consumption of fresh organic produce by families.

#### → Populations

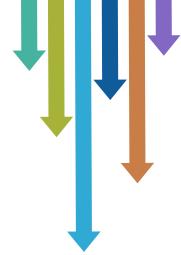
Some philanthropists will concentrate on the types of communities whom they wish to support. There are many possibilities; for example, women, children, the elderly, youth, refugees, and animals.

#### → Places

Place-based funders are often driven by heritage or experience. They may fund different issues within a specific geographic location. Locations can vary greatly from a continent or region to a village or a neighborhood.

#### → Institutions

Other funders will want to support organizations that achieve goals that they care about. They will want to help build institutions that make a difference. Examples, to name but a very few: think tanks, advocacy organizations, museums, community centers, day schools and academic institutions. The potential list is huge.



## STEP 2: NARROWING THE FOCUS

Once you identify the area(s) of concentration for your philanthropy, you might have to narrow your focus. Fields like education and the environment are convenient categories, but are obviously too broad for any individual person to tackle. Look at the components of the field. With education, for example, the components could be early learning; primary and secondary school; higher education. Even within the components you may need to move to a more specific topic (teacher training for primary/secondary school, for example).

### ► A narrow focus doesn't have to mean a single focus.

With an enormous number of significant philanthropists, the question becomes not which area to focus on, but what combination of areas to support. Interests may span more than one topic.

Jewish funders, in particular, may want to consider how best to balance giving to Jewish causes and to secular causes, as well as how to navigate between communal and individual gifts. Those with a deep connection to Israel may wish to reflect upon what percentage of their giving should be earmarked to causes close to home and what percentage should be directed to international giving, particularly in Israel. These frameworks will be discussed in more detail in the last chapter of this guidebook.

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## STEP 3: DEFINING THE OUTCOME YOU SEEK

Thoughtful philanthropy means not only knowing the challenges you want to tackle, but also knowing what changes you want to see. Whether you call it a goal, an outcome or a solution, it's important to have a clear vision of the desired end result. For instance, many worthy nonprofits address literacy issues: some run tutoring programs in community centers; others partner with school systems or social service agencies; others try to figure out the best techniques to teach adults; some groups exist solely to advocate for funding. It's important to consider how an organization tries to solve a problem, not just which problem it tries to solve.

## Finding Your Focus

Angelica Berrie jokes that her Jewish journey started in a Catholic convent school in the Philippines. There, the word “philanthropy” was not a part of her vocabulary. But, Angelica entered a whole different world when she married New Jersey sales entrepreneur Russ Berrie, whose success with teddy bears and Russ Trolls fueled their philanthropy. Angelica discovered the satisfaction of giving, not from seeing their names on buildings, but in connecting the dots between people, ideas, and passions. Russ encouraged Angelica to pursue her own interests. She began by joining a group that founded a Gilda’s Club in Northern New Jersey. She went on to chair the global board of Gilda’s Club Worldwide. It was her first experience in the nonprofit world, and taught her how she “could add value by giving fully of herself beyond writing a check.”

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*“Giving is not just about writing a check. It is a relationship between those who have the means to touch people’s lives and the causes that inspire their generosity. In the process, we are transformed by acts of loving-kindness.”*

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As her mentor and partner in philanthropy, Russ encouraged her to ask tough questions and set conditions before making a gift. The Berries wanted their Foundation to be a value investor, treating its gifts like social investments, with appropriate due diligence, measurement, and evaluation. Knowing how the dollars are spent, what impact and results comes from grants, whether the foundation has “made a difference” are all important aspects to be considered.

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Angelica supports many causes focused on building a pluralistic world where people of all faiths can co-exist peacefully and be respectful of each other's religious traditions. These include the Center for Interreligious Understanding, the Shalom Hartman Institute in Jerusalem, and the John Paul II Center for Interreligious Dialogue. Angelica's personal journey took her to convert to Judaism after discovering the double joy of learning and belonging to a caring community.



## Your approach

The Talmud (Baba Batra 9a) says: “*Greater than one who does a mitzvah, is one who causes others to do a mitzvah.*” If you really want to be effective, wake others to the problem, and mobilize their efforts. Tzedakah is about reconnecting people to the social network of needs. But there are many ways to use philanthropy to achieve your goals. The method by which you believe change will happen is called a strategy, a theory of change, a logic model, or an approach. The term you choose is not as critical as the following question:

### **How will philanthropy help achieve your goals?**

This is a weighty subject that is dealt with in detail in other RPA guides and on the RPA website. For example, your goal may be to improve and protect a critical watershed area. You could choose among these approaches for your philanthropic path:

#### → **Research**

Fund studies to understand and define the impacts of what might be discharged or built near the watershed.

#### → **Awareness**

Support campaigns to raise public awareness of current or potential harm to the watershed area.

#### → **Policy**

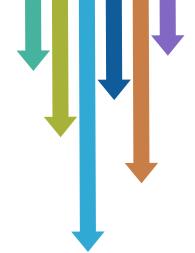
Participate in efforts to shape the legal and regulatory framework protecting the watershed.

#### → **Innovation**

Sponsor projects that seek new technologies for activities that currently pose a threat to the watershed.

#### → **Remediation**

Contribute to programs that work to repair the harm that's occurred.

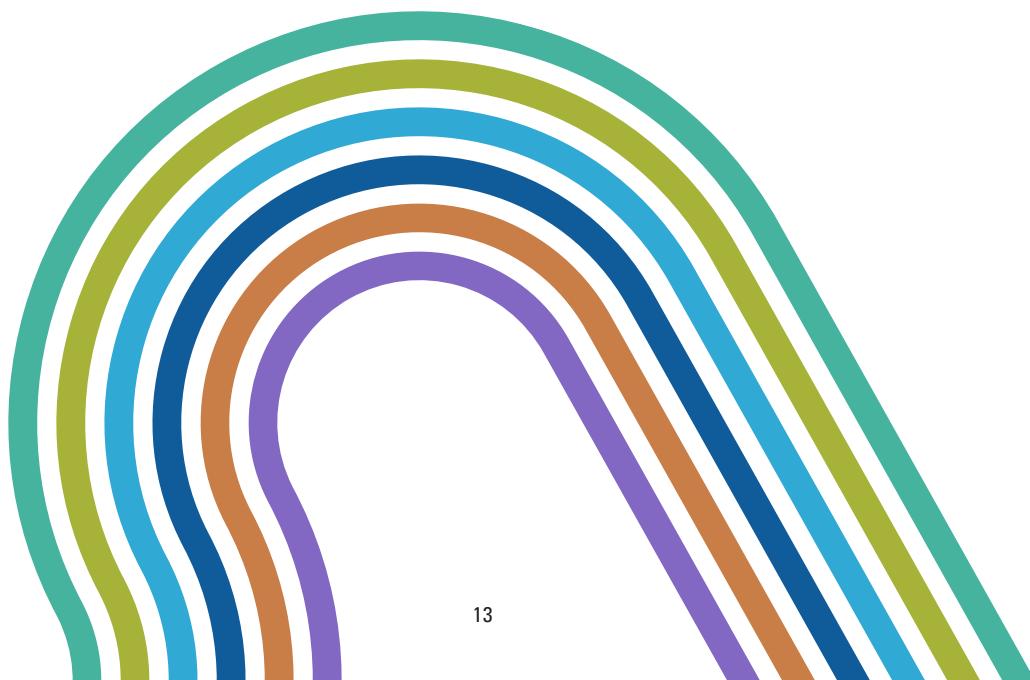


In many cases, the path will not be so clear. You may be faced with competing theories, all of which are compelling but none proven. You will have to make informed decisions based on the facts available, the thinking behind theories that might work, and your own comfort level about what sort of investment you are willing to make.

**Once you have settled on the approach to reach your goal, you can put some thought into tactics.**

- What's your time horizon?
- How concentrated do you want to be?
- Do you want to support five organizations or 50?
- Do you want to fund operating programs, or make capital grants?

Many philanthropists think beyond the traditional grant and consider whether an investment is the right tool to achieve the change they seek. The investment might be an equity fund for social entrepreneurs or a loan to a nonprofit to launch an earned-income enterprise. For these funders, the important question is, "What is the optimal way to use money?" The field of mission investing, sometimes called impact investing, is blurring the boundaries between philanthropy and capital markets. That's a good thing. But like any strategy, such mission investing is not a cure-all for every situation.



## Funding Innovation and New Technologies

When they left their home in the Soviet Union in 1981 to escape rising anti-Semitism, Galina and Lev Leytes were hoping to carve out a safer and more stable existence for their growing family. The pair arrived in the U.S. with little more than their science and engineering degrees, \$270 in cash, four suitcases, and a baby daughter. Within a decade of settling in Palo Alto, California, the couple had founded and built a NASDAQ hi-tech company in Silicon Valley, which ranked 41st in the Inc. 500, Inc. magazine's list of the fastest growing companies in the United States. Since then, they have dedicated themselves to playing a leadership role in funding alternative energy research.

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*“When we enable Israel to become a world-class supplier of alternative energy technologies, we strengthen and possibly transform the country economically and politically.”*

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“In the past, fossil energy was what we have found under our feet, and in the future, alternative energy based on new technologies will be found between our ears,” the Leytes’ explain. “That’s an opportunity not to be missed. That is why we’ve chosen to focus on funding alternative energy research in Israeli academia, where such research is most cost-effective.”

Lev and Galina created the Israel Strategic Alternative Energy Foundation (I-SAEF) which facilitates research of alternative energy technologies in Israel

that can be commercialized to transform the world's energy landscape. The Leytes measure their work in terms of concrete outcomes. For example, the development of "solar paint," which could turn any roof or wall into a low-cost cell and enable a cheap and abundant new energy source.

"As philanthropists we were looking for opportunities to work on projects that will have a very positive impact on Israel and on the world at large," the couple says. "We are applying all the lessons we learned as entrepreneurs to our philanthropic initiatives: organizing a team of people to work on ideas, selecting the best technology, raising funds, and creating a strong operating environment for the best use of those funds."



## *Assessing Your Philanthropy*

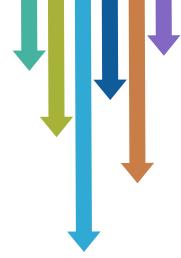
When we invest in a business, we look for results at the company level. In the nonprofit sector, we also look at how the nonprofit organization can deliver programs that will bring about sustainable change in the community or even the world.

Assessing such societal change is difficult. Multiple variables make cause and effect hard to pinpoint. Other factors that make assessment difficult are the huge range in time horizons among philanthropic endeavors. Some vaccinations offer the prospect of simultaneous treatment and cure. However, medical research can take decades. Most social challenges such as poverty, lack of human rights, and ethnic conflict have time horizons that in some cases may have no real endpoint. All we can hope for is to make some progress in our lifetime. Does this mean that philanthropists should walk away from thinking about impact at the system level?

Not at all. Without considering the broader context, philanthropists run the risk of funding “successful” programs that make no real difference. Various approaches to assessment include evaluation of results, evaluation of the work as it unfolds and even return on investment in regard to social entrepreneurship. For now, it is important that you understand that assessment, while still an art and not a science, is an important part of the philanthropic endeavor. Regularly reviewing the results of our giving allows us to adjust our approach given that information.

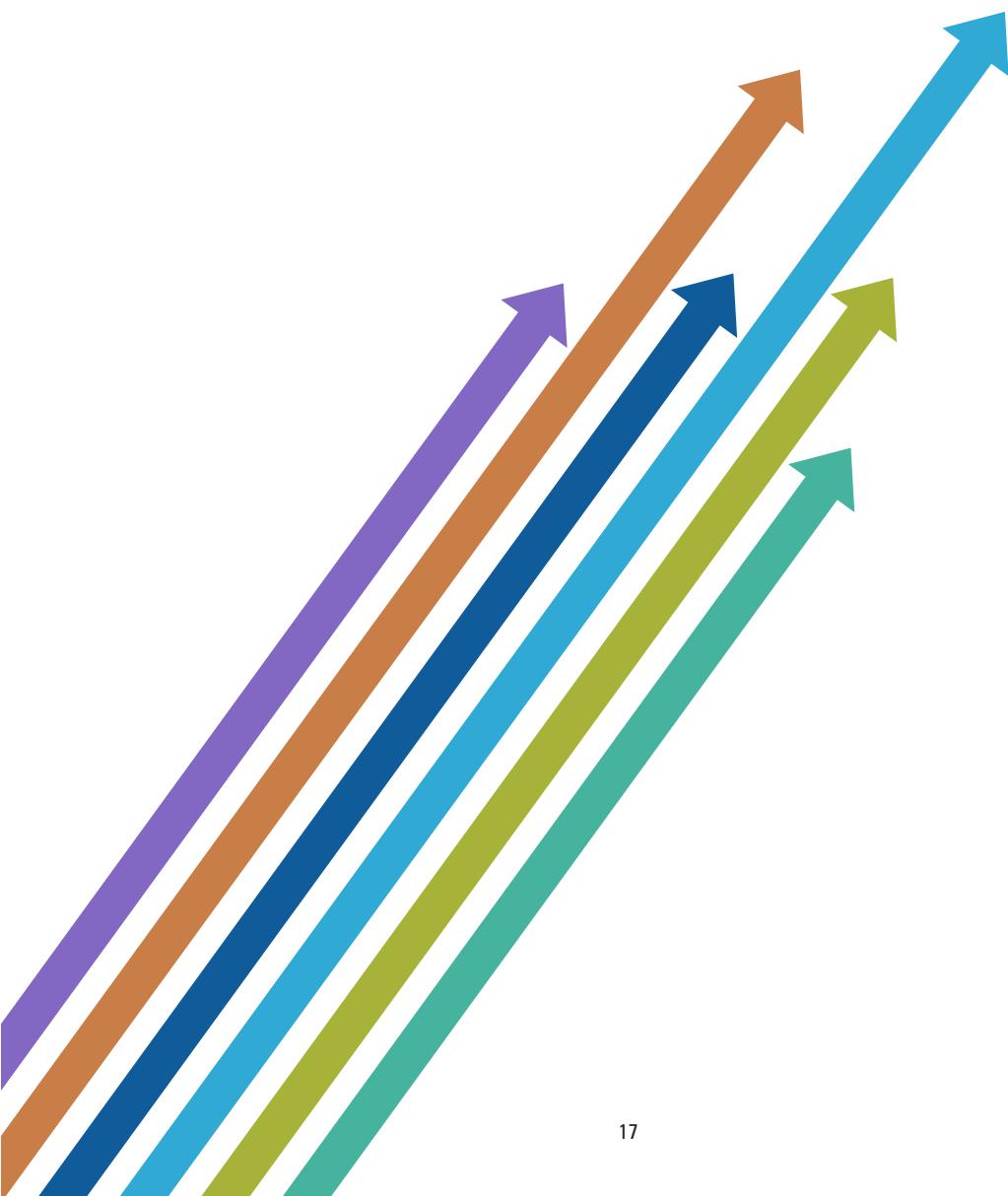
### **Ask yourself: “What are the outcomes I seek as a result of my giving, and how will I go about measuring them?”**

In evaluating impact, it is important to distinguish between “outputs” and “outcomes.” The “outputs” often consist of programs, services provided and workshops while the “outcomes” focus on less tangible measures such as changed behaviors and acquired knowledge. For example, the number of meals a soup kitchen provides on a monthly basis would be an “output”; reduction in hunger among a target population served by that soup kitchen would be an “outcome.” Reflect back on your personal vision for your philanthropy. Do the grants that you make help the charities you support accomplish what you envision as the desired impact?



## ➔ **Tips for Measuring Impact**

- Track multiple indicators
- View measurement data as a learning opportunity
- Be flexible; utilize continuous feedback to regularly adapt your philanthropic approach
- Create a meaningful conversation as a result of assessments
- Consider site visits as a valuable way to assess impact



## Defining Goals and Measuring Outcomes

Charles Bronfman is the second son of Sam Bronfman, the storied founder of Seagram Company in Montreal. After dropping out of McGill University midway through his junior year to enter the family company, he was quickly put to work to learn all areas of the business. When he was twenty-five years old, Charles took over all of Seagrams' marketing in Canada, and at age twenty-eight, he was appointed president of Seagram's Canadian operations. With increasing responsibilities through the years, he closed out his fifty-year career at the Seagram Company as its co-chairman.

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*“To have a sustained and strategic impact, philanthropy must be conducted like business—with discipline, strategy and a strong focus on outcomes.”*

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Charles got involved with charitable giving at a young age, collecting fifty-cent pieces for the Montreal Jewish Appeal. That was just the beginning. 1968 was a turning point for Charles. He seized the opportunity to be founding owner of the Montreal Expos, the first of the Canadian expansion teams of Major League Baseball. It was a chance to shift from being an inheritor to being a pioneer. With his newfound self-confidence, Charles created the Andrea and Charles Bronfman Philanthropies (ACBP).

Through the foundation he has maintained two overriding commitments. The first is a deep devotion to supporting Israel through educational enrichment programs and Birthright Israel. The foundation partners with Brandeis

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University to evaluate the long-term impact of Birthright. Data is collected from program participants and non-participants before and immediately after the program occurs. A follow-up survey is administered to the entire group at a later time to draw long-term effects of the program. Initial results indicate that Birthright is achieving its desired results.

The second funding priority emerged from Charles' distress over his fellow Canadians' tendency to define themselves by what they are not. The ACBP has backed an effort to feature the accomplishments of a variety of Canadian heroes in its Heritage Program shown in trailers in Canadian theatres.

But Charles and Andrea never imagined that the Philanthropies would continue indefinitely. They decided to have the ACBP spend down the foundation's corpus by 2016, when Charles turns eighty-five. In this way, the foundation can better concentrate on its mission and fulfill Charles' and Andrea's objectives and vision. It also placed the emphasis on the work and the impact, and not on the organization.

After so many decades of experience, Charles has emerged as one of the leading Jewish philanthropists in his generation. **“Philanthropic dollars,”** he believes, **“need to be invested only in the best way. They are too precious, and the charitable needs are too great, for anyone to be satisfied with anything less.”**

## *Involvement*

Many people say that their work in philanthropy gives them great joy. They dive into their philanthropy, and it becomes their new vocation. But that role is not natural for everyone. Here are some questions to ask yourself, and again these are choices with no right answer. Your choices may change as your experience shifts your perspective and as other factors in your life evolve.

→ **How active do you want to be, and how much time do you want to devote to philanthropy?**

Do you want to be personally involved in researching areas of giving, in meeting with other funders, in reviewing potential grantee organizations and in monitoring progress?

→ **How public do you want to be?**

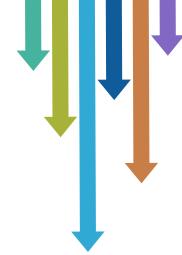
Some people are committed to anonymity. Others directly seek philanthropic partners and advocate for their causes, organizations, and programs as part of an overall strategy. They are happy to lend their name, reputation, connections, and their powers of persuasion to their philanthropy.

→ **Will there be a joint decision-making process?**

The selection of issue areas can be very challenging when there are multiple philanthropic decision makers: a couple, a set of siblings, a parent with adult children, grandparents with adult children and teenage grandchildren, etc. This decision-making process is best approached through a strategic planning process that allows each participant to explore and express his or her motivations, and choice of issue area(s). Once those ideas are on the table, many family members find themselves impressed and inspired by the views of others. Even so, some difficult decisions about priorities and proportions will need to be made.

→ **Do you want your family to be involved?**

For many philanthropists, undertaking a philanthropy program with their family is an important way to share significant experiences, learn together, develop a legacy, and transmit values. It's critical that the ground rules are clear for family philanthropy to succeed. If one person will be making all of the decisions, do not pretend otherwise. While one person or generation might be calling the shots, the next generation is observing and learning. Having the younger generation take



a backseat, however, may not lead to the engagement that the older generation would like to see. The leader of the family may need to choose between a philanthropic goal and a family goal, or adopt a more inclusive and flexible strategy for their philanthropy. To get significant and sustained family participation, family members across the generations will need a voice in decisions about issues and goals to be pursued, and funding strategies. Finding methods of offering the next generation some control of the charitable assets through discretionary funds or donor advised funds is a method that has proven successful for many families.

► **Are there other non-financial resources you want to bring to philanthropy, beyond your personal capacity?**

► **Do you have access to relevant expertise, products, and services?**

► **Do you seek to leverage your funds by collaborating with others?**

One note of caution here: we frequently hear enthusiastic philanthropists declaring intent to collaborate or to engage with partners. Often that means that they want other people to follow their lead and commit to what they have supported. This is called fundraising, and it's an honorable thing to do, but it's not the same as collaboration or partnership. Working in collaboration means that you need to give up some control to your funding partners. If that's not acceptable, recognize that you're fundraising.

► **What will be the mechanics of your philanthropic program?**

- Will you use a foundation?
- A donor advised fund?
- Some combination of the two?
- Direct giving?
- If you are actively involved in business, how will your philanthropy be separate from or connected to your business?

*Transmitting philanthropic values to the next generation  
“is best delivered through example rather than didactically.”*

– David Tanner

## The Strength of Family Philanthropy

**W**hen David and Peggy Tanner's sons—Eric, Mark, and Robbie—turned 13, each received a JCF donor advised fund in his own name in honor of his Bar Mitzvah. In lieu of gifts, guests were asked to contribute to the fund. Each Hanukkah, the Tanners make an additional contribution into their children's funds.

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*“Peggy and I, and our parents before us, have all felt that being active and engaged and generous with philanthropic activities is part of what it means to live a full life.”*

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The Tanner sons often use their funds to support the schools they've attended, to make grants to charities in honor of their parents and relatives and to support causes that they care about. Mark, for example, has given in his father's honor to Montefiore Medical Center, where David serves as Chairman of the Board. Eric and Robbie's involvement with Seeds of Peace, a non-profit that helps teenagers from regions of conflict learn the skills of making peace, was so meaningful that their mother became involved and was recently named Chair of the Board. Eric and Robbie both support Seeds of Peace and now do it in honor of their mother.

“Peggy and I, and our parents before us, have all felt that being active and engaged and generous with philanthropic activities is part of what it means to live a full life,” David says. “It was very important to us that we transmitted to our children the values of philanthropic giving and community involvement.” For David, who has served as past President of Jewish Communal Fund, philanthropy is a way to give back personally. “I wanted to follow my parents’

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example, but in order to make it personal, I needed to carve my own path,” he says. “I wanted to give to causes I was passionate about in my own right. I see philanthropy as a very personal choice.”

In addition to serving as Chairman of Montefiore Medical Center, David also serves on the Board of Trustees of NYU Law School and was Co-Chair of the Northeast region of the Princeton capital campaign. Another favorite cause is Lawyers for Children, which was founded by a friend of his to provide legal and social work support to abused and neglected children in foster care. “My engagement with Princeton is primarily one of gratitude and wanting to be a part of the Princeton community. With Montefiore, I believe so passionately in the good they are doing and the power of their model to make a real difference in the Bronx while improving the healthcare delivery model more broadly.”

Peggy, in addition to her role as Chair of Seeds of Peace, is on the boards of Dartmouth College, Blythedale Children’s Hospital in Westchester and The Summer Camp, a not-for-profit that provides girls from low-income families and foster homes with a two-week camping experience.

Transmitting philanthropic values to the next generation “is best delivered through example rather than didactically,” says David.

## *The Jewish Philanthropic Journey*

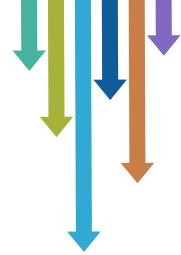
In some ways, a Jewish philanthropic journey is no different than any other. The five previous milestones apply to any philanthropist irrespective of cultural or religious background. Yet our Jewish traditions add a series of new dimensions that pose distinctive considerations for the Jewish philanthropist. First of all, there's a unique concept of philanthropy in Judaism: the idea of "Tzedakah," the commandment to give as an act of Justice, rather than an act of generosity or personal virtue. Jewish tradition makes giving one of the central duties of a Jew. From the Biblical tithing to the eight degrees of Tzedakah of Maimonides, a rich repertoire of laws and customs related to charity occupy a central place in the Jewish sources. For a Jew, giving represents a manifestation of two central values: "philanthropy" (from the Greek "love of humanity") and "Tzedek" (justice). Another traditional characteristic of Jewish giving is the commitment to maintain strong a vibrant community. Therefore, there's a strong communal dimension in Jewish Giving and a delicate balance between the individual and the collective.

In this section, we present a number of questions that Jewish funders need to consider when they embark on their philanthropic journey. As with every question in this book, there is no right or wrong answer. Asking questions, and wrestling with them, is in itself a Jewish value.

### → **Jewish vs. Secular Giving**

Currently, what percentage of your giving is directed to Jewish charities and what percentage goes to secular charities? How do you balance your allegiance to Jewish causes and organizations with your support for secular organizations? What is your view on supporting Jewish organizations that provide non-sectarian aid and services through a Jewish lens?

# for Jewish philanthropists



## → Communal vs. Individual Giving

A defining feature of Jewish life is the presence of strong communal organizations that provide a “safety net” for Jews in need and a vast array of cultural and religious services. Providing support to one’s community has been an important value throughout Jewish tradition and is reflected in many Jewish texts. How you define both your community and your communal responsibility will play a role in whether you focus your giving on communal organizations, or on specific issues you are passionate about where you want to “move the needle.” What proportion of your giving will you channel through communal organizations and what portion will you allocate independently? How do you prioritize your own philanthropic goals in relation to the needs of the greater community?

## → Connection to Israel

Our connection to Israel and support of the Jewish state is one of the defining features of Jewish identity in America. How do you view your connection to Israel, and how does that inform your philanthropy? What is your responsibility towards Israel vis-à-vis needs at home? How do you set priorities? What is the focus of your work in Israel—is it general “nation building” or specific societal issues that need improvement? What are the advantages of providing general support versus focusing on a specific part of the country and its unique problems? How do you find reliable sources of information about issues? In sum, how do you navigate the complex philanthropic landscape in Israel and make the most effective funding decisions?

With the emergence of local philanthropy in Israel, partnerships, and joint projects between philanthropists from both sides of the ocean are now possible. Yet collaborating with partners has its challenges, especially when partners are thousands of miles away and there’s a cultural gap. So, how should you approach collaboration to build solid partnerships?



## *Conclusion*

Although they must reflect on unique considerations, Jewish philanthropists are privileged to be guided by the extraordinary power of the Jewish tradition. Jewish tradition provides a valuable roadmap to help us give wisely and with impact. Jewish sources teach us about the need to support the Jewish community as well as to give to secular causes. They advocate for giving generously to support Jews in need and Jewish institutions, but they also place “tikkun olam” [repairing the world] as a central element of the Jewish mission.

The philanthropic journeys shared within these pages were meant to inspire you and your family to engage in meaningful conversation around shared values and giving strategically. We hope you will continue these conversations and find your philanthropic activities all that more rewarding as a result. Jewish Communal Fund and Jewish Funders Network are here to assist you throughout every step of your philanthropic journey.



# MOVING FORWARD

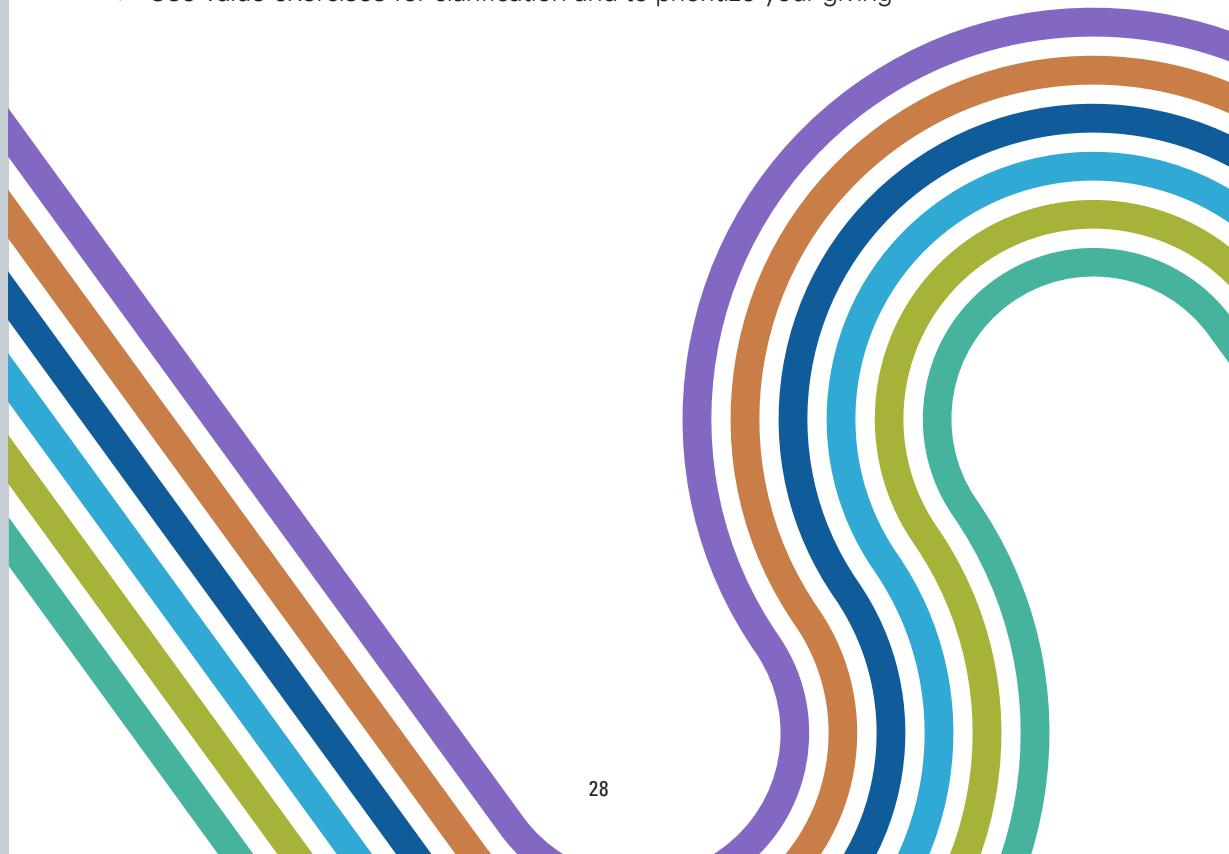
There is much to consider in building your own giving strategy and getting started with your philanthropy. There is also significant potential for life-enriching work. Great philanthropists, like great business leaders, take inspiration from their intuition as well as personal insight and passion, and build their good works on a foundation of planning and experienced advice. In other words, you don't have to do this alone. In fact, we recommend that you involve your personal advisors and family from the beginning.

**You might want to reflect on these points:**

**Make an effort to understand why you want to give to allow your giving to be its most meaningful. You have many options when it comes to choosing your issue areas and which approaches to use to achieve your desired outcomes.**

## *Actions*

- ▶ Reflect on what you've learned as a result of your life experiences
- ▶ Draw inspiration from the rich Jewish tradition and values surrounding tzedakah
- ▶ Incorporate the wisdom of individuals who have influenced you
- ▶ Involve family members in these discussions
- ▶ Use value exercises for clarification and to prioritize your giving



**Allow yourself a learning period and take the time to research thoroughly what you want to achieve. These choices will determine the parameters of your philanthropy. They should be informed choices.**

## *Actions*

- ▶ Seek out opportunities and resources for Jewish learning and narrowing your focus within the causes you have identified as important
  - ▶ Join organizations for funders such as Jewish Communal Fund and Jewish Funders Network that can accompany you along your philanthropic journey
  - ▶ Access the wealth of information on charitable giving and on specific issues on websites and in print
  - ▶ Attend educational programs from professional and academic institutions
  - ▶ Retain a professional advisor
  - ▶ Define the outcome you seek to achieve
- 

**Making informed strategic choices is important, but it is also critical to give your attention to implementation.**

## *Actions*

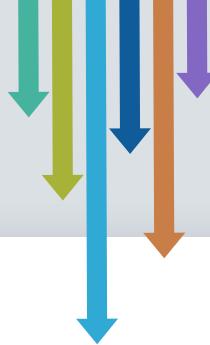
- ▶ Jump in; the learning continues as you begin the process of giving
  - ▶ Gather feedback and information about your grant-making
  - ▶ Ask your charities for data that demonstrates results
  - ▶ Adjust your strategy as you move forward
- 

**Discover the excitement and joy of the process of giving.**

## *Actions*

- ▶ Involve family members or like-minded people
- ▶ Join a giving circle
- ▶ Volunteer
- ▶ Serve on the board of a non-profit organization

*Enjoy the journey.*



## ACKNOWLEDGMENTS

We gratefully acknowledge contributions from the following sources:

Berrie, Angelica and Klein, Peter. *A Passion for Giving: Tools and Inspiration for Creating a Charitable Foundation*. (John Wiley & Sons, Inc., 2012).

Bronfman, Charles and Solomon, Jeffrey. *The Art of Giving: Where the Soul Meets a Business Plan* (Jossey Bass, November, 2009)

Jewish Funders Network: Members' Profiles

Rockefeller Philanthropy Advisors, *Your Philanthropy Roadmap* (2011)

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## Your Personal Connection to Charitable Giving

Jewish Communal Fund's philanthropic services offer many advantages over checkbook or private foundation giving. First of all, it's SIMPLE! You can establish a JCF fund in less than a week by making a minimum contribution of \$5,000 in cash or appreciated securities. Once you open the fund, you take an immediate tax deduction, and pay no capital gains tax. And, you may select from JCF's many investment options, so your charitable assets grow tax-free. Donors receive a single letter for tax filing—**there's no need to track-down receipts from multiple institutions**. JCF enables you to recommend grants of \$36 or more to the IRS-qualified charities of your choice using JCF's secure private website. It's that easy!

When you open a donor advised fund at Jewish Communal Fund, you'll join our community of Jewish philanthropists and enjoy the following benefits that set JCF apart from other donor advised funds:

### Personal Attention

JCF provides responsive, personalized service that makes it easy for you to pursue your philanthropic objectives.

### Flexibility and Maximum Tax Deduction

JCF is a 501(c)(3) tax-exempt public charity. You receive the maximum tax deduction allowed by law when you make a contribution to JCF and can make decisions about which charities to support at your convenience.

### Ease of Use

Fund holders can check fund balance, investments, and contribution history and recommend grants online at their convenience.

## **Strategic Use of Appreciated Securities**

Gifts of long-term appreciated securities to a donor advised fund receive an immediate fair market value deduction for up to 30% of the donor's AGI (versus 20% for gifts to a private foundation). Furthermore, gifts of closely held stock and most other appreciated property are deductible at fair market value versus "at cost" for private foundations. JCF also accepts gifts of real property on a case-by-case basis.

## **Prompt Processing of Grants**

Grants are processed and mailed to charities in 1 to 3 business days.

## **Lifecycle Funds**

JCF offers lifecycle funds to help you celebrate special occasions such as the birth of a child, Bar/Bat Mitzvah and weddings, by giving the gift of tzedakah. Establish a fund and invite family and friends to make tax-deductible contributions.

## **Educational Resources**

JCF offers a wide array of seminars, pamphlets, and online resources to help our donors be more strategic and have greater impact with their philanthropy.

## **Support for the Jewish Community**

When you establish a fund at Jewish Communal Fund, you maximize your philanthropic reach and support for the Jewish community. Each year the Board of Trustees of JCF makes a Community Gift from revenues and fees to support programs and institutions that promote the welfare and security of the Jewish community at home and abroad. Since 1999, more than \$9 million has been awarded from the Special Gifts Fund to many worthy causes selected with the assistance of UJA-Federation of NY.

## **Privacy and Confidentiality**

A donor advised fund is not required to publicly disclose the grant making activities of individual donors. Also, grants may be made anonymously.

**The Jewish Funders Network (JFN)** works with Jewish funders, at the individual and collective levels, to improve the quality of their giving and maximize their impact. With an innovative array of programs, including the annual JFN international conference, JFN supports funders at every stage of their philanthropic journey. It is a platform for funders to learn, exchange and collaborate. Above all, JFN leverages the power and the creativity of networks to produce change in the Jewish world.

➔ **JEWISH** *If your Jewish identity informs your philanthropy...*

➔ **FUNDERS** *If you are a funder who is committed to effective and impactful philanthropy and...*

➔ **NETWORK** *If you believe that it takes collaboration and networking to make it happen...*

*...then JFN is your home.*



A resource produced by  
**JEWISH COMMUNAL FUND**  
and  
**JEWISH FUNDERS NETWORK**

