



Jewish Strategies to Maintain Connections Between Faith  
Communities and Their Nonprofits: Findings from the Faith  
and Organizations Project

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Funded by Lilly Endowment Inc

*All Jews are responsible for one another. So that's our basic concept. We believe that a strong Jewish community is a positive influence spiritually on the whole world. So by building strong Jewish communities we're helping to contribute to the betterment of the whole world (interview with Jewish organization leader)*

Jewish communities and their organizations present a strong contrast to mainline Protestant and Evangelical strategies to maintain relationships with their nonprofits because education and social supports are seen as the responsibility of the entire community, with a heavy emphasis on community wide planning and collaboration across agencies. As discussed in more detail below, this expectation of community responsibility fostered community wide funding and planning systems by the early 20<sup>th</sup> century, which gradually evolved into Federations that now aim to serve as comprehensive fundraising, planning and centralized support structures for many local communities.

In addition to the Federation system, U.S. Jews have created a network of umbrella organizations for the Federations (Jewish Federations of North America <http://www.jewishfederations.org>) and various types of nonprofits. For example, there are national professional organizations for the Jewish Community Centers (JCC), Jewish family or social service organizations, and Jewish vocational organizations. The synagogue based school in the study belongs to the network of other Solomon Schechter day schools in the U.S. These professional associations provide places to learn best practices, share strategies, and network for new employees. For instance, the director of one of the JCCs in the study commented that the national JCC umbrella helps identify candidates for open executive positions.

In addition, in contrast with almost all other religions in this study, Jews tend to see professionalism as an important aspect of providing faith based service. Nationally, the U.S. Jewish community has created a variety of graduate level professional degree programs for Jewish communal workers to help ensure highly trained professionals that understand the faith base for their work. These efforts to create uniquely Jewish professionals combine with both national and local education programs to educate lay leaders.

Judaism differs from other religions in that it is both a religion and an ethnic group, with Jewish communities striving to include "the unaffiliated," or Jews that do not belong to a synagogue or participate in Jewish communal life. Jewish identity has traditionally been established by birth; in the more traditional denominations, the child of a Jewish mother is considered part of the Jewish community. In the liberal denominations, a child may be considered Jewish if their father is Jewish, provided that the family pledges to raise that child within the Jewish community. There is an increase in conversions, resulting in more "Jews-by-choice" looking for involvement in Jewish community organizations. Indeed, it has been pointed out that in the pluralistic, democratic environment of the United States, where studies have shown that people often consider changing the religion of their birth, ALL Jews can be considered Jews-by-choice.

Membership in a synagogue or Temple is voluntary, and many Jews consider themselves "cultural" Jews with little religious affiliation. Since the 1950s, several Jewish planning studies have expressed concern over intermarriage rates and low percentages of synagogue membership. As a generally well educated and affluent community that has largely assimilated into U.S. society, most of the Jewish community both maintains the separate structures of the

ethnic group and participates fully in U.S. socio-economic and political systems. Fostering community has increasingly become a goal for Federations.

The Jewish support system also differs from that of other religions because the community wide system to support Jewish nonprofits was not formed by synagogues or Temples, and indeed is considered a neutral entity where Jews from various branches of Judaism and secular Jews can work together. While most Federations today have some form of outreach to synagogues/Temples, the worship communities remain separate from the Federations. While Jews who emigrated to the U.S. before the late 19<sup>th</sup> century mostly came from traditional Orthodox religious backgrounds, in the late 19<sup>th</sup> through 20<sup>th</sup> century, the religion in both Europe and U.S. has evolved and splintered into several movements that define and practice the religion differently.

The major divisions in the U.S. include the modern Orthodox, Conservative, Reform, Reconstructionist and ultra Orthodox/Hasidic movements. Each differs in its interpretation of Jewish law and tradition, including dietary rules, appropriate activities for the Sabbath, and the role of women. With the exception of some types of Orthodox movements, Jews have no hierarchical or higher level adjudicatory bodies. Congregations are constituted locally with affiliations through conferences associated with various branches of Judaism such as the Reform and Conservative movements. Rabbis and other key staff are hired by their members. Studies are revealing new trends in how young adults view membership in communities, organizations, and denominations. One study called *Synagogues That Get It: How Jewish Congregations are Engaging Young Adults* (Tobin Belzer and Donald Miller, S3K Synagogue Studies Institute, 2007 p.7) points out that:

Many [young adults] make a point of avoiding denominational labels, which, they explained, obscure rather than clarifies their identities. These young adults have come of age in an increasingly pluralistic and global society. They have little patience for anyone who tries to lionize one path above others. They are put off by inter- and intra-religious judgment and competition. Many see denominational distinctions as a source of divisiveness.

As such, synagogues and temples often compete with each other for members, donations or visibility. Yet most share a sense of wider Jewish community and responsibility to provide support and education for their members. Federations are often seen as the neutral meeting point where Jews from diverse religious backgrounds come together to support the community as a whole.

### **History of Jewish Federation, Social Service, Health, and Education Nonprofits in the U.S.**

Jews migrated to the U.S. in several waves. While a small number of Jews have lived in the United States since the early colonies, the first large migration consisted of German Jews in the mid 19<sup>th</sup> century. This population quickly assimilated with a significant number becoming wealthy, developing both strong Orthodox populations and following their German cousins in developing the Reform movement. A large influx of Eastern European Jews arrived between 1880 and 1920, with their descendants forming the core of most U.S. Jewish communities today. While class variation existed within this newer migration, many of the Eastern European Jews were craftsmen or small businessmen from small villages, lacking the sophistication of the German population.

This Jewish migration mingled with the even larger Eastern and Southern European migration drawn to the U.S. by the industrial revolution, and experiencing the poverty and poor work conditions of many U.S. cities at the turn of the century. Although German Jews had earlier founded educational and social welfare support organizations, this new migration fostered a strong concern to provide supports and Americanize this large Eastern European population. Many of the settlement houses and precursors to other Jewish recreational and welfare institutions were founded at this time. Simultaneously, the Eastern European population developed fraternal groups and a network of their own institutions to support their own.

By the turn of the 20<sup>th</sup> century, Jewish communities grew concerned over the multiple competing fundraising efforts and duplication of services. The Federation movement started in Boston and Cincinnati, quickly spreading to most of the Jewish communities in the U.S. with sufficient population base (Bernstein 1984:3). At the local level, Federations are member organizations designed as the fundraising and planning arm for Jewish social service, Jewish education, and Jewish communal life in constituent communities. Although Federations and their constituent agencies are separate from congregations, the religious and social welfare institutions maintain strong social capital ties, each recognizing the importance of the other.

Federations initially consisted of separate fundraising and planning arms. These combined campaigns initially included separate appeals for Palestine/Israel and local communities, most of which had evolved into combined United Jewish Appeal campaigns by the 1950s. These combined fundraising efforts provided models for Community Chest and later United Way fundraising systems. Bernstein (1984: 6) comments: "The combined campaigns raised more than the total of the previous fundraising by the original agencies...The agencies found that they were becoming stronger, more effective organizations within the Federation."

The research and planning arms also evolved and grew over the years. U.S. Jewish communities have a strong history of research and planning that grew more sophisticated over the 20<sup>th</sup> century as its members became more educated and as planning evolved as a profession. Many local communities began population studies combined with needs' assessments every ten years by the 1950s. Planning for specific purposes had developed before that. For example, the current Jewish Community Center system in Baltimore conducted recreation planning studies in 1936 and 1947. The logic behind planning for the Jewish community is documented in the 1947 study (National Welfare Board 1947: 46): "...the Jewish Community of Baltimore has the opportunity to provide sound, long range planning program which can make possible savings for the community, both financially and programmatically..."

Planning efforts sought to ensure that community needs were met and duplication of services avoided. Before institution of the Federation system, Jews had developed a plethora of nonprofits and member benefit organizations to serve various purposes. Much of the Jewish social welfare system developed as an alternative to state and private social welfare systems that were fundamentally Christian in origin. In addition to a felt need to provide for Jews to protect their well being and so that they would not become a burden on the state, Jewish institutions also developed to provide culturally and religiously appropriate services to members of the community. Most mid-sized to large Jewish communities had old-age homes, organizations to provide for the poor or those with special needs, some form of child welfare, hospitals, and numerous recreational, educational and member-benefit associations. Synagogues and Temples formed their own after school religious education programs and day schools, some of which evolved into community schools for particular branches of the religion.

These independent organizations decided whether or not to join the local Federation. Usually, most of the social welfare organizations joined the Federation and the JCCs, as they were created, became key beneficiaries of the local Federation. Federation membership varied more for senior services and health organizations. For example, Charles E. Smith Life Communities, including the Hebrew Home and its affiliates, is an elderly housing organization that is still the largest Jewish institution in Washington DC area, yet it has never joined the Federation. Agencies joining the Federation often were given slots on the Federation board in exchange for agreeing to limit independent fundraising while encouraging cooperation among agencies, discouraging duplication of services, and following other Federation community wide policies. These often include determining holiday or Sabbath closing policy and sometimes levels of Kashrut, or dietary laws. In the two communities in this study, community development organizations, newer social support institutions and consolidated agencies emerged from Federation planning initiatives although they may not be Federation members/beneficiaries. In addition, Jews continue to form organizations for many purposes independent of the Federation. Many, perhaps most, Jewish organizations are not beneficiaries of a Jewish Federation yet Jewish organizations, whether affiliated with Federation or not, tend to be continually aware of their Federation status. The exceptions are the schools, many of which continue to be under synagogue or temple auspices. However, Federations increasingly provide support for educational programs as well.

Despite a focus on serving one's own, sensitivity to being outsiders and real or perceived anti-Semitism, the spiritual conviction to do good and heal the world has led many Jewish social welfare, health and community development institutions to offer services to the wider society in a manner consistent with Jewish values but without stressing religion. Even the JCCs, considered core institutions in developing Jewish identity, report non-Jewish members. The percentage of Jews served varies widely depending on agency policy and individual programs. Many Jewish organizations receive significant government funding, Carp (2002: 193) reports that in 1994, 55 percent of the funding for Jewish hospitals, 76 percent for Jewish nursing homes, 61 percent for Jewish family services, 77 percent for Jewish vocational services, and 5 percent for Jewish community centers came from government. Such funding generally requires service to people from diverse backgrounds.

Federations' stance regarding whether Jewish agencies should focus primarily on Jews or provide a Jewish presence varies widely. Increasingly, Federations are seen as the neutral center where Jews of all religious backgrounds and non-religious "cultural" Jews can come together to support the community. This unity in diversity role for Federations was highlighted over and over in our research. Perhaps the best examples come out of controversies. The following quote comes from a statement released by the Baltimore JCC in 1978 through the Baltimore Jewish Times in the midst of an ultimately unsuccessful attempt to open the JCC serving the less Orthodox community on Saturdays:

Those who are concerned about Jewish survival do not speak of one particular group surviving while others are allowed to assimilate or disappear. "We are one" does not mean "we are the same." It means we have an unbreakable bond that makes us responsible for each other. This might translate into a liberal Jew helping fund an Orthodox day school he will never use and that educates children to a form of Judaism that he doesn't believe, or insisting that meals served in Jewish institutions be Kosher so that no segment of our people is prevented from participating. Within this context non-orthodox Jews who desire Sabbath opening are requesting that they not be prevented from participating. To do otherwise is once again to prevent a segment from participating and in essence to weaken, rather than strengthen the Jewish people. (Underlining in the

original, from unpublished documents presented to the Associated, the Baltimore Federation, in April 1978, courtesy of the archives of the Baltimore Jewish Museum).

Regardless, over time Federations have increasingly played a role in creating Jewish leadership, fostering Jewish identity, managing relationships with the surrounding non-Jewish community. Leadership development programs started early, with young leadership programs beginning in the 1930s (Bernstein 1984: 7). These have become more sophisticated over time. They draw young adults into formal education and mentoring programs designed to provide formal training in the practical theology of Jewish social welfare and develop effective board members and other volunteers. Both communities studied also place young leaders first as observers on Jewish boards then help place them in initial board appointments. The result is a network of lay leaders trained in board governance, fundraising and the faith base for their service – leaders likely to evolve into the next generation of community leaders.

The same is true for professional staff. Starting in the 1960s, Federations encouraged development of executive leadership certificate programs and graduate degrees in Jewish communal service (Bernstein 1984: 266-269). Like the lay leader programs, these professional programs develop highly trained professionals, with solid understanding of Jewish history and values and strong social networks among themselves. Professional organizations combine with active involvement in umbrella groups to foster shared practices and employment networks. Faith based professionalism began early in the Jewish system. For example, the 1947 recreation study (National Jewish Welfare Board 1947: 46) commented that:

The outstanding failure has been the lack of professionally trained staff who would have geared the programs more closely to the needs of the individual, would closely evaluate the program in the light of new trends, would aim to intensify the Jewish content of the program and constantly reach out for new areas and new levels of operation.

Jewish emphasis on education as a mechanism to enhance religiosity stems from several centuries of Jewish tradition. Traditionally, Jewish communities have expected that Jewish men understand the Torah and participate actively in worship, with religious leaders called Rabbis, which translates as teachers. The historic priesthood in existence before the fall of the second Temple is still recognized, but Cohenim - as descendants of the priesthood are called, have a symbolic role that varies depending on the kind of Judaism. Education for boys continued throughout the Diaspora, and both formal and informal discussion sessions on the Torah and Talmud - the commentary on the Torah -- became culturally approved activities for adult men that continued into the 20<sup>th</sup> century. In Orthodox communities, these continue today with other forms of Judaism developing alternative Jewish education programs for both children and adults. Reform Jews have included women in education from its start, with the Conservative movement including women in increasing roles by the 1950s. This focus on education, particularly active reinterpretation of theory through education, extended to secular training by the late 19<sup>th</sup> century.

Although Federations initially had little to do with education programs because they were seen as the province of the synagogues and temples, recent studies highlighting lack of Jewish affiliation and intermarriage have gradually led them take an increased role in encouraging Jewish education and identity. Activities including sponsoring institutes for Jewish education, various programs to promote Jewish identity like youth programs and trips to Israel, and support for day and afternoon schools. The Washington DC Federation, which formed in 1976, included day schools as members. By 1989, the Baltimore Federation had created a Board of Education. Baltimore's Associated now provides some funding to day schools as well as managing a major

Jewish foundation grant to provide scholarships to Jewish day schools. Allocations for Jewish education in Baltimore increased from roughly 4 percent in 1989 to 8 percent today. Washington DC uses nearly 10 percent of its non-designated gifts for Jewish education and outreach.

In addition to these formal education initiatives, Federations have recently developed outreach initiatives to newcomers and the unaffiliated as well as encouraging Jewish identity formation through the JCCs. JCC is seen as a core Jewish institution, but one that attempts to serve Jews with a wide range of beliefs. JCCs carefully negotiate their relationship to synagogues and are viewed differently by various community members. Consider, for example, these two statements describing the JCC from a JCC lay leader and a prominent local rabbi:

This is a Jewish center where anyone can go and believe in whatever faith they want to believe in and get whatever out of it that they can, but it is just this center of core values that does everything from aging adults to infants and everything in between (interview, lay leader).

...if you are talking about a Baltimore Jewish community, what you might assess is secular institutions: Associated - JCC, you know, institutions that are ruled by consensus, open to everyone and are governed by "Jewish values" but have to be non-denominational because religious expression is seen as divisive (interview, rabbi).

Regardless of the internal discussions within the Jewish community, they also regularly create organizations as an interface with non-Jews. Community relations councils initially formed for two reasons: 1) to combat anti-Semitism, and 2) to facilitate relationships with the wider community. This second role can take several forms. In Washington DC, the Jewish Community Council, now Jewish Community Relations Council (JCRC), plays a significant role in local, national and international policy-making as well as interactions with government. For example, JCRC was instrumental in securing funding for a new building for one agency participating in the study and has provided similar support over time. In Baltimore, the Baltimore Jewish Council has increasingly developed intergroup relations programs since the 1968 Baltimore race riots destroyed numerous Jewish businesses. Both community relations councils are Federation members.

In the last two decades, Federations consolidated their planning and fundraising arms into one agency with a broad community support and planning mandate. In addition to fundraising, planning, educational and outreach initiatives, the Federations increasingly provide centralized supports for their member agencies. These supports take several forms. Federations manage endowments and small family foundations in both cities participating in this study. They also provide centralized volunteer and employment banks and Jewish education materials or programs for agency staff and lay leaders. In Baltimore, the Federation owns the property for all its member organizations except one, providing facilities maintenance and playing a significant role in most capital campaigns. They also provide insurance for agencies and offer back office supports like payroll for smaller organizations. Several newer organizations are run in-house as divisions of the Federation. While Washington DC does not offer this extensive array of services, it does offer some and is currently contemplating offering more centralized back office supports in an effort to economize for agencies.

Today, there are a wide range of Jewish agencies serving various purposes. Those associated with the Federations have tended to consolidate into larger units and increasingly develop funding sources through fees and grants external to the Federation. For example, Washington DC's Jewish Social Service Agency (JSSA) has included the Jewish Educational and Vocational

Service (JEVS) along with other social welfare supports. In Baltimore, the Federation collapsed the Jewish Family Service, child welfare, Boys and Girls clubs and JEVS into one Jewish Community Services in the last two years. Jews continue to create and support organizations independent of the Federation, some that maintain a Jewish identity. For example, one Washington DC agency that provides similar services to Habitat for Humanity formed outside of the Federation but receives broad support from synagogues, Jewish developers and other groups in the Jewish community. In Baltimore, several young Jews recently formed a “Jewish Ronald McDonald” house independent of the Federation.

These two examples highlight the fact that while the Federation, its member organizations, and the synagogues/temples loom large in understanding the Jewish community and its institutions, the community is wider than these organizational forms. Clubs and nonprofits form outside of these easily identifiable institutions, including national institutions like B’nai Brith with local chapters that have existed for over a century. Understanding the Jewish community’s connections to its institutions involves noting both activities associated with Federations and religious institutions as well as the involvement of individuals independent of these institutions.

### **Organizations and Communities in the Study**

This study involved two Jewish communities: two organizations in the greater Washington DC metropolitan area and four in Baltimore, with six organizations participating in the intensive first phase of the study. We added two more Washington DC area nonprofits for the second phase and one in Baltimore. Washington and Baltimore fall at different ends of the continuum of Jewish communities with very different Federation/agency relationships as a result. While Washington DC had a small insular Jewish population since its founding in the 1820s, most area Jews arrived after 1940 for government and related employment or higher education. Widely geographically dispersed, it considered itself too transient to form a formal Federation until 1976. While the Jewish population has grown and become more settled, it still includes significant numbers of Jews living in the Washington metropolitan area for a short time. Most of its participating agencies existed before the Federation and it has a less prominent role for all of them in fundraising, planning and coordination. With approximately half of its estimated Jewish population affiliated with the Federation or core institutions in 2008, it has a significant current focus on outreach, particularly to teens and young adults.

Although the Washington DC Federation participated in the Faith and Organizations pilot study in 2004-2006, it chose not to participate in this study. To provide a balanced community perspective, we relied on earlier research with the Federation from the pilot and interviews with older community leaders for the Federation that had diverse views of our participating agencies. Agencies include an organization for the elderly and one of the JCCs that are Federation members and a community development organization that is not. We also included a synagogue interfaith initiative.

Baltimore remained a small, insular, multi-generational community until recently with Federation and JCC staff both reporting that community studies ten years ago revealed that the newcomer population now is larger than the older community. Outreach to newcomers is a significant initiative, but connecting them to the established population remains a problem. Although some geographic dispersion exists today, for most of its history it has a compact geographic footprint and identifiable community population centers. While comparatively small, Baltimore’s Jewish community has been a strong, well-off, nationally prominent community funding numerous large synagogues and one of the strongest Federations in the country, the Associated: Jewish Community Federation of Baltimore. It also has one of the largest and most geographically

concentrated Orthodox communities in the country, which means that community practices often respond to the expectations of this visible and vocal Orthodox community.

Our study included the Associated and two of its member organizations in phase one of the study: the JCC and its community development organization. We also included a synagogue based day school, which is a program of the synagogue with a separate advisory committee consisting primarily of synagogue members. Later in the study, we added the hospital system that is still a Federation member although the system board, which includes a non-Jewish hospital, operates largely independent of the Federation.

## **Practical Theology**

Jewish theology of support for those in need, charity and justice comes from a combination of the Torah and the Talmud, and is reinterpreted regularly in Jewish communities and their institutions. As the quote from the beginning states, it starts with a responsibility for the community and each other. Carp (2002: 182) comments that “the responsibility for those in need is a Jewish requirement that is rooted at the very foundation of our communal processes... Jewish people have always understood that caring for the poor and sick was too important to be a matter of individual conscience alone.”

Three key concepts embody Jewish philosophy on social welfare tikkun olam (to heal the world) chesed (loving kindness) and tzedakah. While the Hebrew tzedakah roughly translates as charity, the concept more accurately combines charity, justice, and righteous duty. Two thousand years of Diaspora living, often in environments that isolated and endangered Jewish communities, has led to a heightened feeling of mutual responsibility within Jewish society. There is a theological notion that the Jewish mission is to be partners with God in creation, and that everyone must help find the sacred in everyday life in order to repair a broken world. This is at the heart of the tradition that "All Jews are responsible for one another," and that leadership may rebuke individuals who are seen as impediments to accomplishing this mission. But both of these ideas only correspond to one part of an ethical equation posed by the great 1st century sage Hillel. He said "If I am not for myself- who will be for me; and if I am ONLY for myself- what am I; and if not now, when?" As Jewish communities have found freedom, acceptance, and a respite from anti-Semitism, Jewish organizations and younger generations of Jews are looking for a new balance in carrying out Hillel's dictum. Many interpret the statement as a continued theme of the Biblical prophets, whose ethical teachings were and are still taken as universal in scope. Growing numbers of Jewish organizations are including non-Jewish causes and clients within a "civic duty" part of their mission.

Well before the formal Jewish education and leadership programs described above, most Jewish professionals and lay leaders learn these precepts as children through family teaching and by example. Stories from the Talmud or later Jewish writers, similar to the parables of the New Testament, often teach these precepts. But modeling is seen as equally important. For example, one young lay leader opened a speech on fundraising for his Federation by commenting that he was serving on this board as an example to his children. Many leaders interviewed described philanthropic activities at home, by their parents and in religious school. The day school that participated in this study has children make tzedakah contributions weekly, and then jointly decide where to give the money each Friday, the eve of the Sabbath. To quote one lay leader:

Although I have friends - Jewish friends - I don't know if they give a nickel to anybody - so I think this is more familial - I think you can generalize about Jews. Some of us grew interchangeably where no matter what you have you give something.

English translations cannot get at the full theological or cultural meanings of these words. Tzedakah, chesed and tikkun olam are all mitzvot, which literally means commandments but often is translated as good deeds. Jewish law obliges community members to provide for others, whether through regular financial donations, volunteering or professional work. To quote one organization staff person: "I feel that in a way I'm doing God's work through this organization and there is some scripture that says, *Working for the Jewish community or working for the good of humanity is equivalent to being in prayer.*"

This is not charity in the sense of providing basic meals and shelter, used clothing, or needs based payments as used by some Christian denominations. Talmudic teachings explain that "the highest mitzvah is to help someone to a lucrative position" and anonymous support is considered a higher level mitzvah than an in-person gift because it preserves the dignity of the person receiving aid. This idea that providing for the community involves offering the highest quality services in professionally run organizations in order to gain the best results runs through all of the Jewish organizations in this study. Agency missions that encourage those served to live up to their highest potential also reflects these teachings.

Justice and charity are also merged in Jewish thinking. Supporting and improving the community is meant to heal the world, tikkun olam. As such, Jewish organizations participated in policy change initiatives early in U.S. history and continue a tradition of best practices and involvement in policy. Justice and charity are often used interchangeably to describe activities. For example, an interview with a rabbi associated with the day school commented: "We have a full department of what we call a gemilut hasadim (social justice) work. We send about 700 volunteers a year out into the field and soup kitchens, habitat builds, any variety of local efforts that we partner with." However, school recruitment literature describes similar activities as gemilut hasadim - acts of loving kindness. Hasadim is a different transliteration of the plural for chesed (loving kindness). These two translations are two sides of the same concept -- through acts of loving kindness one improves the world, thus promoting social justice.

These concepts were often explicitly stated in mission statements, and organization literature targeted primarily at the Jewish community. Some organizations used these concepts in their materials regardless of the audience. However, they were just as likely to be embedded in the governance and service practices of the agency. For example, at a fundraiser, the chairs talked about the agency "touching 30,000 lives a year, not just Jewish. The agency provides tikkun olam for everyone." A development director, trying to create an outreach letter that she could send beyond the Jewish community commented: "So I would say that the letter itself does not have an overt Jewish appeal. It has an underlying [one] -- improve the world for individuals and the community."

These concepts have varying interpretations and can lead to debate within the Jewish community about whether or not the agency is living up to Jewish values. In both the pilot study and this study, debate most often centered on tikkun olam. Consider these two definitions of tikkun olam from leaders of two Jewish agencies that serve both Jews and non-Jews:

All Jews are responsible for one another. If you ask me what drove me or what drove the organization, it was that, if there weren't a strong Jewish community here, then the institutions in the neighborhood would suffer and that the Jewish community would once

more leave the area. That wouldn't be good for them and it wouldn't be good for the city. But that's a...that's easier to get your arms around the Jewish community than the whole world.

Repairing the world...Our board has defined it very broadly. And one of the things I like to say is that we are the Jewish Council for the Aging – not the Council for the Jewish Aging. That was part of the explicit discussion between the founders of this organization who were all Jewish and that has continued to this day.

While both organizations serve both Jews and non-Jews, the first interprets tikkun olam as focusing on the Jewish community and the second on a Jewish responsibility to provide for the entire community. These different interpretations impact on target audience, branding, and other aspects of organization practice. The Jewish focused organization sees its primary target audience as Jews, although some of its programs serve more non-Jews than Jewish community members. The second organization has several programs that primarily serve Jews, but its target audience is clearly defined as the entire community. The first has a clearly Jewish name, and uses Jewish precepts in all its literature. It is located in Jewish community owned real estate. The second has gradually rebranded to de-emphasize its Jewish associations especially to the non-Jewish community so that non-Jews will feel more welcome and it moved out of Federation-owned real estate many years ago. Both organizations practice Jewish values, easily articulate the relationship between practical theology and their work, and have almost exclusively Jewish boards. Yet their interpretation of this one key Jewish theological concept shapes each organization differently.

Jewish concepts of afterlife also promote particular forms of giving to organizations as well as donations in general. While ideas of heaven and hell (gehenna) appear in Jewish thinking around the time of the development of Christianity, these are later day additions, not core religious concepts. Jewish traditions stress that everyone will be resurrected when the messiah comes. However, in the mean time, people live in the memories of others and the good deeds they perform in life. Financial donations by an individual or their loved ones, particularly “naming gifts,” significant donations that lead an organization to name a facility, room, community program, award or even piece of furniture in an individual's honor, reflect these beliefs. Sometimes, places will be named for an active volunteer in honor of their good deeds regardless of financial contributions. Smaller naming gifts, like leaves on a tree of life provide similar naming opportunities for less affluent or less generous donors. In addition, the tradition of creating family foundations, often the source of grants to Jewish organizations, come from the same belief system.

Beyond these primary concepts, Jewish practical theology reveals a diverse range of religious practices defined by a combination of boards, sponsoring synagogues and Federations. Both Federations have policies requiring member agency board members to contribute to Federation annual campaigns, often through volunteerism and monetary contributions in a form of tzedakah. With the exception of hospitals and other organizations providing critical life preserving services like the Baltimore hospital, Jewish agencies affiliated with Federations in both communities closed on Jewish holidays, but not the federal religious holiday of Christmas. Until spring 2009, the Baltimore Federation required all member agencies except the hospital system and one retreat center to close on Friday evening through Saturday in honor of Sabbath. As discussed below, the suburban JCC has now been allowed to open on Saturday afternoons. Kashrut policy varies with Baltimore agencies providing strict kosher meals in facilities for the Orthodox while agencies in Washington DC define policies depending on their audience.

Baltimore's Associated has encouraged agencies to start board meetings with D'Var Torah, or a lesson from the scriptures related to the main goals of meeting, which we witnessed at two organizations. While Washington DC agencies recognize this practice, it was not used at board meetings. One annual meeting began with a Jewish song by a Cantor. Ironically, while Baltimore's Associated uses more traditional religious practices, it clearly states that each of its agencies is open to everyone regardless of religion. Washington DC Federation, on the other hand, seems more concerned that its agencies focus on the Jewish community.

### **Stewardship and Maintaining Connections in the Jewish Community**

The introduction, history and discussion of practical theology describe the primary Jewish strategies for maintaining connections between nonprofits and the Jewish community. Federation member organizations and synagogue sponsored schools respond to policies set by the Federation or synagogue. In Washington DC, these were formalized through contracts as well as requirements that agencies participate in joint agency planning and collaboration meetings. For instance, JCA participates in the Federation-sponsored Interagency Forum on Aging. Baltimore has a number of mechanisms to maintain connections, including formal relationships like owning the property and providing insurance. But connections are maintained primarily by regular ongoing conversations among board, staff, and other lay leaders from agency and Federation. Federations encouraged collaborations and programs that involved multiple agencies working together to provide community wide initiatives. As such, Jewish communities offered more holistic initiatives than regularly occur in both secular and other faith based organizations.

The rich social networks and strong bonding social capital within the Jewish community is its most effective way that the community supports and guides Jewish organizations. Although none of the boards in this study except the school board formally stipulated that members must be Jewish, all were either 100% Jewish or had but one or two non-Jewish members. This was true of organizations that actively sought non-Jews, with agency leadership commenting that non-Jews often stated that they were uncomfortable given the overwhelming Jewish culture of board meetings or attempting to be "more Jewish than actual Jews." Agencies tended to develop boards that reflected their mission and philosophy of Judaism, but most boards included people from several branches of Judaism as well as secular Jews.

As with board members, none of these organizations stipulated Jewish leadership, but boards regularly chose Jews to run organizations and openly discussed Jewish values in interviews. In Baltimore, the Associated also participates in leadership selection. Key staff persons were often drawn through social networks, either from the Jewish communal service community nationwide or the local community. Below the level of executive director, the percentage of Jewish staff varied widely depending on staff function, with even the day school hiring non-Jewish teachers. Fundraising and community staff often targeted Jews because leaders wanted someone who knew the local community and Jewish culture.

Community networks and the theology of financial obligation contributed to strong financial support for these organizations from the Jewish community. Federation contributions have declined across the board over time as a percentage of budget, with none of the agencies in this study receiving more than 25 percent of its funds from its Federation. Jewish community funding and connections to Jewish foundations and individual Jewish philanthropists played a significant role in shaping Jewish and innovative programming. None of the agencies in this study was dominated by government funds, with all also receiving a mix of funding from individual donations and program fees like memberships, adult day care fees, and other

program service fees. The percentage of program fees from Jews varied depending on the agency and program. However, agency leaders and development directors stated across the board that most private foundation grants and individual donations came from Jews.

Community media, in the form of the Washington Jewish Week and Baltimore Jewish Times, also provided a forum for agencies to share their activities and for the wider community to comment on many aspects of the organization. Other media like Baltimore's large signs outside almost every religious and secular Jewish institution stating "(Organization name) is Associated are You?" promoted both the annual fundraising campaign and community cohesion. Organizations and Federations also regularly used websites, list serves, outreach activities in secular institutions like libraries or universities and a variety of other mechanisms to reach the Jewish community and promote Jewish institutions.

While both Federations had volunteer banks, the role of volunteers varied depending on agency focus. Direct service volunteers were far less central to Jewish organizations than in some other religions given the value placed on professionals. All organizations drew volunteers from both the Jewish community and elsewhere.

The various community and leadership education initiatives described above enhanced already strong community cultural values to support and maintain connections to organizations. Ongoing planning activities spearheaded by either organizations or Federations generally included significant community needs assessments and involved conversations with multiple Jewish stakeholders, further increasing connections between organization and founding community. None of the organizations in this study complained that the Jewish community did not pay enough attention to them or that they had trouble finding board members. Instead, many commented that the Jewish community could be too involved. Community members would regularly contact agency or Federation staff and lay leaders to make suggestions, give praise or complain about agency services. As discussed next, community conflicts could quickly escalate because of dense communications in these Jewish communities.

## **Addressing Opportunities and Concerns**

### *Organizational Transitions*

Transitions in Jewish organizations usually came from two sources, planning initiatives and leadership changes. As discussed above, both Federations and agencies engaged in regular planning. This led to the creating new agencies, agency consolidations, new programs, and refocusing on various aspects of community practice. Planning also built on regular communications with the wider Jewish community and media commentary. For example, Baltimore organizations gradually transitioned from Kosher style to strict Kosher observance as the Orthodox community grew and became a more active participant in community wide and Federation activities.

As with organizations in other religions, leadership transitions also provided an opportunity to refocus organizations. Although several of the organizations participating in the study reported having had less effective organization executive directors in the past, all of the participating organizations had long standing executive directors that drew high marks from their staff, board and often Federation as well. Description of leadership hiring suggests carefully vetting of leaders for compatible religious philosophy and view of the target community as the current board. In Baltimore, the Associated actively participated in leadership vetting though this did not appear to occur in Washington DC. In addition, while none of these boards participated in daily

organization operations, all included active members who had a hands-on approach to their governance and fundraising obligations. As such, they paid attention to leadership decisions and organization operations in ways that could easily check decisions that did not meet board approval.

### *Community Conflicts and Concerns*

Both in the pilot and this study, concerns over organization change or activities focused not on program operations but whether or not the organization was Jewish enough, as defined by segments of the population. This focused on two issues: definitions of tikkun olam and religious practice. Agencies became lightning rods for discussion within the diverse Jewish community. Organizations that targeted both Jews and non-Jews equally often drew criticism that they were “not Jewish” or “not Jewish enough” from certain segments of the community. Agencies responded with statements that they were clearly practicing Jewish values as they defined them or targeting certain programs or facilities for Jews or the more religious. For example, Sinai Hospital’s central administration building central hallway features walls studded with Judaic art and a prominent wall of key donors. The hospital also has a Kosher café, special elevators for Shabbat and a code of service practices for their Orthodox clientele that reflect Orthodox precepts and traditions. However, the emergency wing, outpatient clinics and especially the new neurological and spine center across the street from the main campus have only oblique references to Lifebridge Health and no visible Jewish identity.

Levels of religious observance also lead to community conflicts that center on agencies. As mentioned above, opening the suburban branch of the JCC on Saturdays in Baltimore has drawn the most sustained and long running conflict. As discussed in the organization history, the Baltimore JCC maintains two facilities, a branch in the core of the Orthodox and older Jewish community in Park Heights, Northwest Baltimore and a newer suburban branch in Owings Mills. Practices at the two facilities differ dramatically with the Park Heights facility offering a variety of special programs like special swim periods for men and women to provide culturally appropriate services for the Orthodox. Before the Owings Mills branch opened as a “youth facility,” the community was already debating whether or not to open it on Saturday afternoons. A planning study as early as 1967 suggested that most other JCCs opened on Saturday and that the Owings Mills community strongly preferred a Saturday option. However, the issue was tabled until the late 1970s. In 1997 and 1978, the JCC engaged in an elaborate community research and planning process that led the board to vote to open the JCC in Owings Mills on Saturday afternoons with programming appropriate for the Sabbath. This proposal was presented first to the Associated in January 1978. As word of the proposed change spread, the Orthodox community mobilized with angry protests that included one lay leader challenging that this change “would brutalize the community” and bumper stickers protesting the change appearing on cars throughout Park Heights. Even though the JCC countered with its studies, responses published in the Jewish Times, and observations that every other JCC in the country opened on Saturday, the Associated vetoed the change. Current JCC and Associated leaders commented that the process had been mismanaged in 1978 through too much time between the JCC presentation and the final vote.

At the beginning of the study period, Federation lay leaders and JCC professionals and lay leaders often expressed frustration in hushed tones about Saturday closings for the JCC and cultural institutions like the Jewish Museum. Such comments, however, were quickly countered by other lay leaders saying that schedules simply were not going to change. Staff at both JCC and Federation said they wanted to try again in the future yet gave no indication that a change was being considered. Plans made behind the scenes however, served to advance the notion

of opening the JCC on Saturdays, with Orthodox leaders invited to a Federation meeting to express their concerns shortly before the final decision was made. Although Orthodox arguments were similar to those made in 1978, the discussion was not nearly as heated and the Federation decided to go ahead with the change regardless of Orthodox protests. More important, the short time frame between this conversation and the formal announcement provided little opportunity for the Orthodox community to mount extensive protests. There was a march by the Orthodox in Park Heights shown on the late night news, but complaints were much more civil than in 1978, and quickly died down. Ultimately, the Federation and JCC managed to achieve the goals stated in its 1978 public materials of ensuring that every part of the diverse community's needs were met.

These examples suggest communities that actively engage conflict and, through planning, research, and substantial communication manage to make decisions when portions of the community disagree. After the recent announcement of the JCC's new Saturday policy, Federation leaders commented that there had been many behind the scenes conversations with community leaders from all factions to facilitate this change. Likewise, an organization in Washington DC with long standing conflict with its Federation over its interpretation of *tikkun olam* recently made substantial headway in mending relationships with key Federation leaders through careful and consistent communication.

#### *Current Economic Conditions*

As with all faith communities and organizations in the United States, the fall 2008 economic downturn resulted in increased need and lower donations for the Jewish community and its organizations. Plummeting stock portfolios lowered available funds for Federations, their major donors, and community foundations. Washington DC Federation and its community lost some funds to the Madoff pyramid scheme scandal, but Baltimore's Jewish community remained largely unscathed.

Both Federations and their member organizations responded with specialized programming, planning, some belt tightening and reported increased donations from the local Jewish community and its foundations to meet increased need. As such, these organizations generally remained on solid financial footing and were able to address changing economic conditions for the people they serve. However, one agency reported that its previously hugely successful capital campaign quickly came to a halt as donors responded to decreased portfolios and uncertain economic times. Several agencies reported decisions to cut staff, planning or program activities. Others saw the economic downturn as a call for increased efficiencies through more centralized Federation services for back office activities.

Changes in the economy, paired with continuing changes in how young adults reflect their Jewish identity, are causing Jewish organizations to reflect on their mission and how it attracts donors, members, and leadership. Many have undergone strategic plans and have become more "mission driven" with focused programs and services. Many have used the non-ritually religious emphasis of *tikkun olam*, repairing the world, to attract younger participants. One study, *Young Jewish Adults in the United States Today* (Ukeles and Associates, American Jewish Committee, 2006 p.3) points out that:

Jewish culture, like the culture of young people in the general community, is increasingly bottom-up, self-generated, and decentralized. To a significant extent, young people are creating their own identities and pattern of association, leading to what we could call "quasi-communities"- built around common interests and shared experiences rather than

around institutions and organizations. Quasi-communities have porous boundaries, are fluid and dynamic.

This will pose both challenges and opportunities to how Jewish organizations recruit and retain new participants, donors, and leadership. In Baltimore, we saw the Associated working through the JCC and several other partners to reach out to younger Jews and those new to the area through several mechanisms: programs that were family friendly offered in center city Baltimore and in partnership with the Baltimore city library systems, email outreach and web mechanisms. Washington DC Federation also expressed concern about reaching out to youth, with youth outreach as an initiative that received additional funding.

### **Implications for Practice**

The Jewish community support system has many aspects that organizations from other religions could model:

- ❖ **Centralized planning, leadership development and religious education services for agencies**
- ❖ **Initiatives to encourage collaboration across agencies**
- ❖ **Dense, active social networks that maintain connections between agencies and faith community**
- ❖ **Clear understanding of the religious values underlying agency services by staff and board that play out in agency practice.** Understandings come from a shared community culture and an array of educational programs available to leaders and staff.
- ❖ **Investing in continuing research on trends showing how the next generation sees the role of traditional values, how they translate these values in a universal cultural spirit, and what are the emerging patterns of affiliation for young adults.**
- ❖ **Multiple national umbrella groups that serve as sources for best practices, sources of new professional staff, help with the vetting of new ideas**
- ❖ **A tendency for leadership to come from the religion, as well as reflect the branch of the religion most comfortable to the current board.**

That said, most Mainline Protestant, Evangelical and Peace church initiatives would have limited ability to develop the sustained community support the Jewish agencies in this study enjoy because of the theology of individual religious service that underlies much post-reformation religious activity and limited higher level adjudicatory central structures. Moreover, different concepts of charity may resist efforts for centralized or community wide supports. For example, one United Methodist organization tried to get its diocese to provide centralized grants management, but failed because religious culture dictated that congregations should be the central locus for these activities. The decline of many United Ways as effective community funding sources in recent years attest to the limited ability of the wider community to successfully sustain community-wide fundraising and planning in increasingly diverse communities with ever growing sets of organizations. Although Federation giving remains at a steady percent of community assets despite continued growth in agency budgets, the community culture and religious obligations for community wide support maintain strong giving

patterns in these two Federations. However, Washington DC has started donor advised giving options like United Way and the Combined Federal Campaign and an increasing number of Federations across the country are struggling.

Both Washington DC and Baltimore are considered strong Federations, although they differ significantly in their strategies due to historic and present day differences in each local community. Baltimore's centralized back office activities may provide a model for other Federations. However, its ability to own all of its member agencies' real estate and the high degree of control over fundraising, leadership selection and other aspects of agency rules may not be transferable to another community. Baltimore enjoys a particularly strong, wealthy and geographically compact local community that remains its core support and enabled its centralized structures. In addition, as a Federation in the original Catholic colony and a traditionally strong Catholic city, Baltimore's Associated benefits from a wider community with a shared sense of community wide supports based on its dominant religious values. The strategy of the Federation owning all the property, playing a role in leadership decisions, and suggesting board members is similar to archdiocese strategies. These similarities might not be as effective in a community where majority practice is dramatically different.

### **Information about the Faith & Organizations Project**

Since the late 1990s, practitioners and researchers from different faiths have been working collaboratively to understand the connection between faith communities and the non-profits they have created, sponsored or supported. The *Faith and Organizations Project* also has explored ways that faith traditions play out in organizational structure and practice, the role of faith based organizations in their service sectors, and faith based organizations' interactions with the people they serve.

This publication is based on findings from the Project's second study, *Maintaining Vital Connections Between Faith Communities and their Organizations*. The project was funded by the Lilly Endowment Inc., with research activities beginning in March 2008. It examines the relationship between faith communities and organizations founded by Mainline Protestants, Catholics, Jews, Evangelicals, Quakers, and African American churches in the Mid-Atlantic (Philadelphia and the Baltimore-Washington metropolitan areas), Midwest (Ohio and Chicago) and South (South Carolina). This report provides details on strategies to maintain connections for Jews, outlines unique relationship challenges, and suggests practical ways that faith communities and their organizations could strengthen their relationship and ensure that faith based organizations receive appropriate support and guidance.

Our first report, *Overview Report on Project Findings*, offers a general summary of key project findings and contrasts religious strategies while our second report, *Comparing Strategies to Maintain Connections Between Faith Communities and Organizations Across Religions*, includes findings for all of the religious traditions in the study as well as an introductory overview of key concepts and a conclusion with comparative findings. A series of best practices documents on topics covered in both reports is in development. These products, along with publications from our pilot study and other information on the project, are available on the project website at <http://www.faithandorganizations.umd.edu/>.

### Suggestions for Additional Readings

Bernstein, Philip (1983) *To Dwell in Unity: The Jewish Federation Movement in America Since 1960*. Philadelphia: the Jewish Publication Society.

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Sapolsky, Buddy and Lawrence Zuffer (2004) *A Delicate Balance: Agency Federation Relations in the Darrell Friedman Era*. *Journal of Jewish Communal Service*: 47-53.

Schein, Jan Bernhard (2000) *On Three Pillars: The History of Chizuk Amuno Congregation 1871-1996*. Baltimore: Chizuk Amuno Congregation.

