

MY JEWISH FEDERATION

Legacy and Change

DOV BEN-SHIMON

There I was, in the middle of a heated conversation with a volunteer.

“How *dare* you?” she said. “Do you even *know* what made our Federation great? It was the fact that we raised *millions* of dollars, every year, to give it away to our agencies. Do you *understand* that? Why would you try to *change* it?”

She was right.

Not only do we raise money to give it away, it’s basically written into our name—we’re a Federation, meaning agencies federated together to create a united Jewish fund in the community. We raise money to give it away. And it has been a tremendously successful model for decades.

But she was also right that we’re changing. Our approach to philanthropy as a legacy institution has been evolving, while we continue our important role in the Jewish community.

I’m the CEO of one of the largest Jewish Federations in North America. Therefore, my view is neither academic, nor is it an attempt to represent the amorphously grouped “Jewish legacy institutions.” But the following is my understanding of how we at Federation approach philanthropy today in order to fulfill our vital mission.

A Changing Jewish Community

Death, migration, competition, and generational priority shifts are facing Jewish organizations. As discussed widely, today's Jews do not feel obliged to join or fund the traditional structures of their communities. The challenge for us—Federations, synagogues, agencies, and organizations—is that we're not relevant to many in the North American Jewish community. So, Federation, as a legacy institution, is now laying the groundwork to be relevant, engaging, attractive, and meaningful to the leaders and donors of tomorrow. Does it mean alienating today's donors? Absolutely not—it's not a zero-sum game: a strong, clear vision of expanding our engagement with the next generation boosts our conversation with our current leaders. They want to know that someone is coming up after them, to continue their work and to sustain timeless Jewish values.

In my community we tell a story (possibly true, possibly apocryphal) about two volunteer leaders arguing about which was better for our Federation—to have one \$100,000 donor (to raise funds efficiently to have an impact on the community, to help our agencies and Israel) or to have a thousand donors, each giving \$100? No matter the source of the story, it's taken us many years to realize that it's better for us to have thousands and thousands of donors at the \$100 level than a small group of donors giving very large gifts. A community organization can't survive long-term on a limited, but generous, major-gift donor base alone. Would I say no to more \$100,000 donors? Of course not. But this shift in fundraising is really a shift in engagement, because Jewish Federations are *not innately fundraising organizations*. Fundraising helps us fulfill our mission, but it doesn't define who we are. Being able to engage with thousands of donors allows many to be part of this mission, steeped in Jewish values, building the Jewish community.

This shift in fundraising is also in reaction to feedback. We keep hearing that legacy institutions overemphasize solicitation at the expense of building relationships. We've heard that we haven't built

meaningful relationships with non-major givers. And this has led to community members having a less than favorable impression of Federation, even when they like our programs without realizing our role in them. Reflecting our mandate to engage all in our community, every day my Federation sends chaplains to visit the sick, PJ Library books to kids and families, and *sh'lichim* (Israeli emissaries) to schools, synagogues, and agencies. We also connect volunteers to awe-inspiring social service opportunities, baking challah for those in need, spending time with our elderly, or taking part in Diller and other terrific teen programs.

People Give Differently Than They Used To

Federations have incredible achievements under our belts. We also have excellent professional staff, nationally and internationally recognized Israel programming, a strong culture of fundraising, dedicated and smart lay leadership, and more.

As discussed in other chapters in this book, there's been a shift in philanthropy throughout our greater society. In many ways, Federation and its mission find it hard sometimes to compete against the single-issue sexiness of the hospitals, the universities, the children's causes, or the elite IDF unit, which all vie for donors' attention. Like me, you've probably heard an assumption that with fewer affiliated Jews and fewer people giving to charity, the easy answer is to say, "Let's scrap the whole thing. It's a dinosaur. Federations and similar legacy institutions are going to slowly dwindle and die." I've heard this argument over and over for the last twenty years. Every few years (or months), some passionate writer predicts the death of the Federation system. And yet, to paraphrase the Monty Python sketch, we are not dead yet. And the five reasons for this continued survival tells you everything you need to know about why we're necessary, not only for the vulnerable of the Jewish world, but also for you and *your* local Jewish community.

First, *no one else can do what an effective Jewish Federation is able to do*. No one cares for those in need, builds Jewish community, and initiates rescue programs with just twenty-four hours' notice. All the amazing things that make you proud—pulling Jews out of evil and dangerous places, sending emergency funds to Israeli hospitals and kids at risk under missile attack, supplying immediate support, while lobbying and securing funds for Holocaust survivors—none of these happen without a Federation infrastructure behind them. We offer security consultations, expertise, and guidance for our synagogues and agencies; we provide human resources support, training programs, and scholarships for summer camps, funding for day schools, Israeli educators for religious and day schools, and much more. Could these things be done without Federations? Sure. But we are the community hub that makes all these tasks our daily work, fueled by unmatched experience and expertise.

Second, *we help build leaders for the entire community*. Studies have continually shown that community and philanthropy are cumulative, not exclusive. If you participate in four things in your Jewish community, chances are you'll engage in five or six. Jewish communal participation is an existential good for everyone, including, most importantly, the participants themselves. But if you do only one thing—if you only sit on your synagogue board, or serve on one agency committee, or support one philanthropic cause—it will probably not last for you. And it won't be great for that one group you support either. You won't learn how to compare and contrast, to argue, to look at 990s and audits and budgets. You won't learn how to ask tough questions, to check the CEO's activities, or to debate. And you won't understand what philanthropy really means as a communal enterprise. Today's Federation engages individuals in the work of the entire community and creates connections among synagogues and agencies. We provide training that enriches all institutions. The resulting synergy creates more volunteerism and philanthropy throughout the entire community.

The vast majority of leaders in our community come through Jewish Federations' Young Leadership Cabinet, an enrichment program run and funded by Federation. In fact, in my Federation, we have a full-time professional who works on a "pipeline" of leadership opportunities for all our synagogues, agencies, and organizations. We know that if you're a Federation budget chair today, you could be a synagogue president in four years. And maybe a national agency chair in eight years. We consider what courses, classes, mentorships, and experiences we need to start providing you with today to help develop you as a leader. Only a Federation can guide your leadership potential from a social service agency to a synagogue to an advocacy program.

Third, *there are issues and concerns that only a Jewish Federation can and should touch*. Don't misunderstand me—I admire, respect, and value the role and participation of single-issue agencies, synagogues, and family foundations. They are crucial partners in building a healthy, vibrant, and diverse Jewish community. Yet, I have seen again and again the irreplaceable role that *only* an effective Federation can play in a community.

For example, if a hostile attacker walks down one of our heavily Jewish neighborhoods with evil intent, who notifies the school three blocks down the road to go into lockdown when the perpetrator is at the Judaica store up the road? It happened in our community. That's why we created a Community Security Platform to connect Homeland Security, state police, dozens of local police departments, and county prosecutors to the institutions that constitute our community. Federation has the unique role of uniting all the individual institutions in our community to be able to create one interface with our state and federal agencies to create the best ongoing security response possible. This is facilitated by Jewish community professionals who work on these issues all the time, investing in sustained relationships with both the individual Jewish institutions and our government agencies. That is what many expect and need in their Federation.

Fourth, *Federations are there to ensure the needs of the community are covered, even when short-term funding evaporates*. I've lost count of the

number of people who say to me “Federations aren’t innovative.” It’s sometimes true and that’s okay. There are smaller philanthropic institutions that are innovative, focused on single issues. And that’s a good thing. However, when the attention moves to the next popular cause, it’s the Federation that will address the perennial needs. Not always perfectly, but Federation focuses on the community’s long-term needs and goals, finding the funding to address them. Our best practices include the requirement for matching funds, appropriate staffing, and ongoing evaluation, and we fine-tune these standards continually to ensure community priorities can continue even if the original funders walk away.

And finally, *Federation provides vital vetting for new ideas*. When new philanthropic initiatives are presented, it’s all too easy to forget the ongoing needs of elderly Holocaust survivors, our social services agencies, or our neglected cemeteries. Bold, radical visions *should* be questioned, held up in the marketplace of Jewish philanthropic ideas, not just for the innovative nature of their proposals, but also for their appropriateness and their rootedness in Jewish values. Federations do this vetting every day. They debate. They argue. If you believe that your program deserves to be listened to, then in our Federation you have to persuade and negotiate. This approach has worked well for the Jewish community and will continue to do so. It makes us excellent stewards of the community’s money and mission.

At Federation *Tzedakah* Equals Jewish Values, Living Lives of Meaning

Why do Jewish Federations focus on *tzedakah* and solicit donations? Quite simply because our view of philanthropy is based on a vision of social justice and communal action. When we solicit gifts, we give existential meaning to our supporters and to our community. When a Federation fundraiser asks you for a UJA gift, she’s not just asking for the elderly Holocaust survivor on the fifth-floor walkup in the

Belarussian village or the at-risk kid in the Israeli peripheral town. She's asking for *you*. What you do with your *tzedakah* reflects the kind of Jew you are. What makes you proud, inspired, moved? What will allow you to look in the mirror tonight, at two o'clock in the morning, and feel good about what you see looking back at you? We're more than a channel of giving money away.

So how are we approaching philanthropy today? In four ways.

First, *we're upholding the best of our philanthropic tradition*. As the Jewish community debates our communal future, there are still Jews at home and around the world who are in immediate need of hope, rescue, and care. If we walk away from whom we have been just to become something new, then we don't deserve to call ourselves a Jewish community. It's that simple.

Second, *we're protecting Jewish communal philanthropy and professionalism*. As our Jewish community strives to ensure safe, respectful spaces for all, it's the legacy institutions that can stand up for the vulnerable, protect against sexual harassers and abusers, and encourage professional and lay leadership development to ensure our community is a place of equal opportunity and safety. Federation should partner with worthy specialists, but this important work won't get done solely by single-issue nonprofits. There are too many gaps between organizations and too many needs not to utilize the unique position and experience we hold. We're the glue bringing together the community, and we have the needed infrastructure and staff.

Third, *we're providing a successful and relevant philanthropic model*. At the end of the day, legacy institutions like Jewish Federations have survived so long because they represent a decent working model that allows philanthropists, community leaders, supporters, rabbis, and institutions to create something better. The model will always evolve, continuing to be a reflection of our best and worst moments. Organizations from outside the Federation world will increasingly look to us for best practices, and many of those that insist how radically innovative and trendy they are will fall by the wayside, leaving us to continue with our tried-and-true model.

And finally, *we're the philanthropic "someone else."* The "someone else" are the ones who stand up when needed. Time and again in our North American Jewish communities, I've heard leaders and philanthropists abnegating responsibility, claiming, "It's not our mandate," when Jews were starving or were in need of rescue or protection. The expectation was the same: "someone else" would clearly step up to the plate to care, to build, or to save. Federations have always been the someone else.

One last thought: On the night of February 11, 2015, in the middle of intensive artillery bombardment, three buses left the city of Donetsk in East Ukraine, filled with 130 Jewish elderly, families, children. In a carefully negotiated ceasefire, they were brought to the safety of the city of Dnepropetrovsk, away from the fighting. Their lives were saved.

Federations, those allegedly lumbering slow dinosaurs, are the ones that funded local partners on the ground, building up their local capacity and credibility to negotiate a ceasefire and to run a fast evacuation with all the support services around it.

But even more importantly, it was the Federation Annual Campaign reserve funds, the community mobilizations, the commitment to long-standing support and partnerships, and the ability to turn to partners, saying, "Go for it, we've got your back," that made all the difference.

In the middle of the fighting, in an emergency, in a war, it's the Federation system that has always stepped up to uphold our values. Close to home, in Israel, or thousands of miles away in places that many of us have never even heard of. For the rescue efforts and for the daily support for hundreds of thousands who have no one, the Federation system truly believes no one should be left behind.

We are ready, at a moment's notice, to fund a rescue mission, quietly, carefully, to save Jews. Anywhere. That's saving the world. That's philanthropy.