Innovation at Jewish Federations of North America
The Key to Success in the 21st Century

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Capstone Project submitted in partial fulfillment of the requirements
for the Executive Masters in Jewish Professional Studies
Spertus Institute for Jewish Learning and Leadership

October 2019
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INTRODUCTION

The only thing for certain is change. At this critical juncture in Jewish communal life in North America, where change is rapid and multi-faceted, the most powerful organization in Jewish communal life must also change or it will become irrelevant. Jewish federations need renewed strength and direction. One organization that can and should pull this all together is the “mother ship”, JFNA (Jewish Federations of North America).

The process for JFNA has already begun. A major strategic planning project was launched in the 2017. I was asked to participate in this project as the professional representative for Small Federations. The initial results have been published and now the planning is taking place.

My Capstone Project will review how and why JFNA is currently in such need of change, the results of the strategic planning process and most importantly, my research regarding one of the most significant shifts recommended – “A national marquee initiative for the next generation of Jewish leadership”.

PART I.

JFNA – A BRIEF HISTORICAL PERSPECTIVE

A. In the Beginning
B. UIA & UJA Saving Lives
C. My UJA Perspective
D. Changing Demographics & Trends
A. In the Beginning

Jews from Eastern Europe began to immigrate to the United States in unprecedented and large numbers at the beginning of the twentieth century. This mass influx of people created a significant need for social services and the money to support these services. Individual efforts began to spring up throughout major cities and neighborhoods where the Jewish populations was exploding.

After a short while it became apparent that with all these organizations vying for funds from some of the same philanthropists there needed to be some central organization. The first federation of Jewish charities – Boston in 1895, Cincinnati in 1896, and Chicago in 1900 – were pioneers in the field of coordinated local fundraising, predating the nonsectarian chest movement by more than a decade.¹

As federations and community centers began to form in cities across the country the formation of fundraising organizations to support a Jewish homeland began to take hold. In 1925, the United Palestine Appeal (UPA) was established in order to unify funding in America for a Jewish national homeland.

The origins of the United Jewish Appeal (UJA) reflect a significant mission of the critical work being done today on behalf of worldwide Jewry. UJA was founded in early 1939 as a result of a merger between the Jewish Joint Distribution Committee (JDC), the UPA, and the National Committee for Aid to Refugees (later NYANNA, the New York Association for New Americans).

This established a central fundraising campaign to provide relief to distressed European Jewish communities. While the fundraising campaigns were being unified to support world Jewry, federations were also growing in communities around the country to support the local Jewish community.

B. UJA and UIA Saving lives

As the 20th Century milestone events in world Jewry developed, the work of the UIA, the JDC and the Jewish Agency were there to provide the rescue and resettlement of Jews, something that didn’t happen enough during the years prior to WWII. This is where the greatest work of the UJA has taken place. There are many examples of rescue and resettlement through the international efforts of North American communities working in concert with the Jewish Agency.

The establishment of the State of Israel, constituting a “law of return” provided a safe haven for world Jewry to resettle in a country of their own. The business of “aliyah” (immigration to Israel from the Diaspora – literally means ascent) involved Jews from countries all over the globe. Most notably is the resettlement of displaced Jews from Europe after WWII, the aliyah of Jews from Arab countries who became inhospitable after the establishment of the state of Israel, the rescue of Ethiopian Jews and the mass immigration of over one million Jews from the Former Soviet Union.

As many historians have commented, the commitment to saving Jews in distress is an obligation made even stronger by the remorse of what wasn’t done to save Jews during the Holocaust. For those who lived during that time and the children of the “Greatest Generation” the connection was
quite visceral. The United Jewish Appeal was further strengthened by the pride of Jews (especially in America) as a result of Israel’s miraculous stance after the “Six-Day War”.

C. My UJA Perspective

My own involvement in Jewish Federation life began at a time when Jews in the Soviet Union were fighting for their freedom. In my passionate evolution of becoming a Jewish young adult (note that Jewish is the first descriptor), I remember wearing the bracelets of Jewish dissidents who wanted out of the Soviet Union.

Since the mid 1980’s, as a young Jewish professional, I connected to the work of our local Jewish federation. This legacy involvement was inspired by my desire to emulate my father’s work in the community as a past president of the Tampa Jewish Community Center and a past president of the Tampa Jewish Federation. My volunteer leadership as a young adult exposed me to some of the “glory days” of UJA’s cutting edge philanthropic efforts.

The biennial UJA Washington Conference, organized by a powerful Young Leadership Cabinet of UJA was a magnificent event that transformed my life and the lives of many who attended. I participated in three conferences before I embarked on another example of successful UJA programming - the Single’s Mission to Israel. Attracting huge numbers of young Jewish singles, I participated in programs and activities that made me a “believer” in the work of Federation and through them, the United Jewish Appeal. I will never forget the feeling of awe as we welcomed Ethiopian immigrants off the plane at Ben Gurion airport.
I saw first-hand how powerful, meaningful and significant was the work of the United Jewish Appeal. I felt the inexplicable pull of living a Jewish life in Israel, an experience I would not have encountered were it not for UJA. I continued this deep connection to my Jewish life by enrolling in the WUJS (World Union of Jewish Students) program in Arad in 1992. After returning to the States in 1993, I knew that living a Jewish life was embedded in my being and thus began my Jewish professional life. For the past 26 years I have been a Jewish communal professional, all but three of those years working at a Jewish Federation.

As demographics and trends effect the national federation system (JFNA), I too feel their impact as a Jewish communal professional.

D. Changing Demographics & Trends

The foundations of Jewish communal life have changed dramatically in my lifetime and has affected my professional life in a most significant way. The national trends that have been the most impactful began emerging at an interesting time. As the next generation took hold of their place as the young adult contingent, UJA and CJF emerged to become United Jewish Communities (UJC - the precursor to JFNA).

The 1990 Jewish National Population Survey painted a picture of how Jewish life in North America was beginning to see dramatic change. The major challenges identified for the Jewish community are a result of the high rates of intermarriage, growing secularism and
“Americanization” as well as the decline in replacing ourselves due to the persistence of low fertility.²

The 2013 Pew Study further reinforced these changes, especially the increase in intermarriage and the loss of Jewish community connection. In Barry Shrage’s article about Interpreting Pew, he points out that only 28% of those responding to the study believe that being part of a Jewish community is essential to being Jewish. These factors and many others have brought us to a new reality of American Jewish life. This new reality is the reason that JFNA is facing a watershed moment of redefinition.

In addition to the demographic changes there are undeniably trends that are reshaping our Jewish community landscape. According to Jeffrey Solomon and Susan Wachsstock, there are ten major opportunities that dominate Jewish organizational life in the 21st Century.³ The following factors impact how critical it is that we adapt to these challenges or become irrelevant.

1. **Structural change in society/economy:** The power of the information economy has substantially changed much of what takes place in the general economy and in the relationship between governments and their citizens and residents. Non-profit civil society, especially Jewish communal service, has not yet responded effectively to these enormous structural

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changes, and the relationship of the individual and the sector seems to have been affected little, which runs counter to all other aspects of individual-organizational relations.

2. *The shift in needs:* Even with Israel in its second year of an intifada and increasing examples of anti-Semitism, most of the amcha (people) are moved more by the hopes and dreams for future generations than for the past challenges such as those of Holocaust, anti-Semitism and building an Israel at risk.

3. *Change in donors:* As with every secular and other religious umbrellas fundraising campaign, Jewish communal giving is challenged by donors' desire to follow their dollars to the end product. The kehillah (community) is often viewed as an instrument of another time and another generation.

4. *Transition in lay leadership:* The past generation of lay leadership was made up of very generous entrepreneurs who combined substantial wealth with the knowledge and experience of growing organizations and working with professional management. They have been largely replaced by mid-career service professionals. In the transition, a culture dominated by process has emerged.

5. *Professional Challenge:* Professionals have had to accommodate to the change in lay leadership. When they must continually strive for consensus, their capacity to build a bold professional vision or drive rabid action is diminished substantially. As managers of process, many professionals are "devalued" for lacking clarity of direction and purpose. Many passionate professionals have opted out of the Jewish communal enterprise for this reason as well.
6. "Reshetetlization": In today's increasingly chaotic environment, the desire for homeostasis often leads to a very localized focus. Consequently, there is less of a sense of collective action and responsibility, except in times of emergencies as in Israel or Argentina.

7. Diversity: There has been an enormous broadening of Jewish life as a result of the increased diversity of the North American Jewish population. Yet, this diversity is not reflected in either the lay or professional leadership ranks, resulting in even a greater disconnect between communal leadership and "the led".

8. Inclusiveness: Most Jewish communal organizations, including the United Jewish Communities, are seen as being exclusive - appealing to a small group of insiders, rather than a broad range of persons with interests and commitments to Jewish community.

9. Quality/Universality: As North American Jews are embraced by general society, they are accustomed to quality that survives the test of universality, shaped by competition and sophisticated consumerism. Jewish communal organizations are shaped by neither of these forces and often demonstrate in all or many of their products a lack of universal quality or appeal.

10. Welcoming Community: The consumerism of Western life is neither understood fully nor embraced by the arms of Jewish community. Whether synagogue, Hebrew school, adult Jewish education, federation, or JCC, the norm has become a drifting in and out based on Life-cycle and other driving events.
PART II.

STRATEGIC PLANNING - JFNA & BRIDGESPAN

A. The Process
B. Results
C. The Key Shifts
A. The Process

When I came to Dayton to become the CEO for the Jewish Federation, the impact of these trends were evident to me and being felt at the national headquarters of JFNA as well. According to (newly retired) JFNA CEO, Jerry Silverman, he realized the need to assess the current state of the federation movement and what needed to be accomplished in the future, especially in light of the impacts of a major shift in Jewish American life. Thus began the collaboration with The Bridgespan Group, a highly respected national consulting firm. I was asked to serve as the professional representative of Small Federations within the JFNA system. The honor and privilege brought me very close to the seeds of change being planted as a result of the findings.

The survey process was quite familiar to me since we had just completed a major visioning session in Dayton that we called Jewish Dayton Dreams Big. Both of these processes utilized similar information gathering techniques. The Bridgespan project included interviews with 64 CEOs, lay leaders and peer agencies and over 350 individual survey responses.

JFNA and Bridgespan assembled a Strategic Review Taskforce composed of 15 lay and professional leaders to participate and guide the process along with key staff at JFNA. Federation Executive Directors (CEOs) were representative of all categories of communities from the Smalls to the Large and many in between. Lay leadership included representatives from these communities as well. There were also the chairs from the National Young Leadership Cabinet included in the process.
Once the process began, this group met on a regular basis to discuss the procedures of information gathering, the examination of raw data, analysis of goals and priority setting. Several working groups met to fine tune each of the recommended areas of improvement or “shifts” in the path forward.

B. Results

Throughout the process several main themes emerged:

- JFNA’s “customers” (both professionals and lay leaders) are not satisfied. The overall grades given ranged from a B- to a C+ with lay leadership giving slightly higher grades than the professionals around the country.

- Several bright spots emerged
  - National Young Leadership Cabinet
  - National Women’s Philanthropy
  - Crisis Mobilization
  - Israel Action Network
  - Washington Office
  - Marquee training programs (e.g. Fundraising University)

- Key Shifts were recommended
  - Re-orient services and supports, with a special focus on talent
  - Develop and leverage dashboards to achieve operational excellence
  - Launch and ambitious continental initiative to engage the next generation of Jews

- Align JFNA’s budget tightly to the economic health of Federations
From such a comprehensive analysis of the work being done by JFNA several of the themes require additional commentary. Of course, the “continental initiative”, now referred to as the Marquee Initiative, is the subject of my recommendations later in this paper. But let’s take a look at what the other themes are telling us.

Why is JFNA getting such low marks (C+) from professionals on its report card? I believe the answer lies in two major areas of impact. The first one is the lingering result of the merger of CJF and UJA in 1999. From analysis by Jeffrey Solomon & Susan Wachsstock, it is clear that JFNA has been struggling with its “raison d’etre”. UJA was once the cutting-edge fundraising organization with innovative philanthropic initiatives (i.e. Lion of Judah, Young Leadership Cabinet, Missions to Israel, etc.) and CJF provided a professional association to support the “talent” in the system. With the merger, the combined organization has continued to have an identity struggle. Is it really trying to be too many things all at once?

Additionally, JFNA is feeling the effects of major demographic changes and significant new trends in the Jewish world. As mentioned earlier, the major trends that are impacting our world continue to inform our dysfunction and our vision forward.

Referring to the “bright spots” in the survey results, I can see threads of the success and global impact from the origins of UJA. The collective philanthropic power of a national system is still in place and working well in specific areas. JFNA continues to respond to global needs through crisis

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mobilization, provides critically needed services such as the Secure Communities Network, addresses national and international political issues through the Washington office and the Israel Action Network (respectively) and continues to develop talent through programs such as “Fundraising University”.

With all the concerns raised as a result of the survey conducted by Bridgespan, there remains a very important role for the federation system and an annual campaign. According to Marc Terrill (President/CEO of the Associated: Jewish Community Federation of Baltimore), the annual campaign still has the power to support our local Jewish communities and, in the process, the critical programs of JFNA.5

Terrill states that the annual campaign is critically important for three reasons:

1. It is a core Jewish value to contribute to the community on behalf of the community; it is a sacred covenant.
2. The annual campaign is the premier community-building event which gets people involved and committed and talking to one another about matters of importance.
3. Every Jewish community will still have to deal with unforeseen emergencies and opportunities.

C. The Key Shifts

In order to focus on “talent” in the system, it was recommended that JFNA re-orient services and support to accomplish this goal. What are the main deficits in the field and how will this address those concerns? One area discussed is the need to recruit, develop, and retain women in the field. Another concern is the overall lack of young professionals going into the field.

The second shift highlighted here is the need to develop and leverage dashboards to achieve operational excellence. In a comparison of foundations to federations one of the major differences was how each one measures success. According to Chip Edelsberg, “The litmus test for success in the federation environment most often is approbation from individuals; in contrast, for private foundations, it is commitment to… demonstrate and document positive outcomes resulting from foundations’ investments in grantee initiatives.6

It’s time that federations around the country are able to report results that are consistent throughout the system. This is a proven success factor of foundations and one of the most important trends demanded by the next generation of Jewish leadership. They want to see the results and impacts of their donations.

The final recommendation of the Strategic Review Task Force is to launch an ambitious continental initiative to engage the next generation of Jews. This is where I would like to focus and develop recommendations of how JFNA can proceed to accomplish this auspicious goal.

While I agree that the previous shifts are necessary to improve the overall health of the organization, JFNA will have the greatest chance for success in the 21st Century if their approach to innovation is strategic. In this next section, I will discuss this approach and conclude with a marquee initiative that I propose to have the greatest impact on our continental Jewish community.
PART III.

INNOVATION

A. Perspectives on Innovation

B. Jewish Innovation & Social Entrepreneurship

C. Successful Ventures – Three Examples
A. Perspectives on Innovation

Is it really a given that you must innovate to be relevant? Before examining some of my list of the greatest innovations that have redefined Jewish life I’d like to “get us in the mood.” Let’s examine perspectives on innovation from some of the world’s greatest thinkers:

- “If you always do what you always did, you will always get what you always got” – Albert Einstein
- “Creativity is thinking up new things, Innovation is doing new things” – Theodore Levitt
- “Innovation distinguishes between a leader and a follower” – Steve Jobs
- “The true sign of intelligence is not knowledge but imagination” – Albert Einstein
- “Without change there is no innovation, creativity, or incentive for improvement. Those who initiate change will have a better opportunity to manage the change that is inevitable.” – William Pollard
- “Without tradition, art is a flock of sheep without a shepherd. Without innovation, it is a corpse.” – Winston Churchill
- “If you have always done it that way, it is probably wrong” – Charles Kettering
- “If you look at history, innovation doesn’t come just from giving people incentives: it comes from creating environments where their ideas can connect.” – Steven Johnson
- Ultimately, progress and innovation win.” – Travis Kalanick

Pulling it all together, World Jewry is changing, the world of philanthropy is changing – JFNA can be on the cutting edge of change by embracing an environment of innovation.
B. Jewish Innovation & Social Entrepreneurship

So how does JFNA accomplish their goal of “launching an ambitious continental initiative to engage the next generation of Jews?” This is what I want to explore - beyond the idea that there is one “silver bullet” that will accomplish this challenge. But, before I delve deeper into the recommendations that I have for JFNA, I’d like to talk about what has already been done in the world of Jewish innovation.

According to Yonatan Gordis, social needs and trends also elicit innovation in a community. “The younger generation often shapes its own communal identification through the act of changing the community itself”.7 The term “social entrepreneurship” has been used to describe organizational ventures that bring about social change. Often this type of change is a combination of applying business and entrepreneurial principals to achieving desired results. The examples listed below would certainly fall in this category.

Let’s examine some the significant institutional initiatives of the early 2000’s that foster creativity in the Jewish world.8 By examining these examples, we can see how innovation is nurtured, supported and funded.

1. The Joshua Venture Fellowship, created in 2000, “was the first Jewish organization to focus specifically on supporting social entrepreneurs. Its fellows received not only financial support but also a broad array of technical assistance, training, and mentoring

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services.” This project, supported by several major Jewish foundations focused on supporting the individual.

2. **Bikkurim**, created by two Jewish professionals, “focused on supporting start-up organizations, rather than on developing entrepreneurial individuals. It was designed as a physical incubator, providing space for an organization as well as ongoing formal and informal learning with Bikkurim staff and consultants and other resident groups. According to Martin Kaminer, one of the founders of Bikkurim, the location of this project physically within the offices of (then UJC) created a unique advantage.⁹

   “We felt great potential existed for creative cross-fertilization between (these groups), the kleine pishers are fervently idealistic individuals with boundless energy who want to grab the world by the lapels and shake some sense into it. They are convinced, usually correctly, that life would be greatly improved were their initiative to reach full flower. They are long on zeal but woefully short on sechel and “connections”. The alte kockers are experienced Jewish communal professionals with tremendous skills and great wisdom who may have had their flame dampened by the bureaucratic grind. Each has something to contribute to the other and if it works we’ll all be better off (Kaminer 2009).”

3. **Natan** was established by four young hedge fund professionals who launched a new grant-making foundation whose purpose (according to their website) is to “engage in strategic philanthropy, where they could use both their minds and their money to support new ideas and transform the Jewish world and Israel.” This fund is closely linked to the giving circle

concept and supports the need for the new donor to have a tangible connection from their funding to the results.

4. **Slingshot** was established at the suggestion of Grand Street members. Grand Street is a network for 18-28 year olds who are, or will soon be, involved in their families’ philanthropy. They proposed that a guidebook be started to identify innovative Jewish ideas, thereby helping them understand the complex landscape of Jewish institutional life. The first edition of *Slingshot: A Resource Guide to Jewish Innovation* was published in 2005. A few years later, several members of Grand Street joined together with a handful of other philanthropic supporters to create the Slingshot Fund, which makes grants each year to some of the organizations listed in the book.

C. **Successful Ventures – Three Examples**

When considering the concept of Jewish Innovation, we should also look at the success of several ideas that have changed the landscape of Jewish life. Some of these ideas required significant financial infusions to get off the ground while others began as “grass root developments” and needed relatively smaller initial funding. One thing they do have in common is that they were created and executed by entrepreneurial philanthropists under circumstances that were nimble enough to be successful.

What could be more impactful and more well-known in our Jewish world than just by saying **Taglit/BIRTHRIGHT ISRAEL**. Since the beginning of the program in December of 1999 over
650,000 young Jewish adults\textsuperscript{10}, ages 18-32, have participated in the 10-day life-changing journey to Israel. As stated on the Birthright Israel Foundation website, the mission is “to give every Jewish young adult around the world, especially the less connected, the opportunity to visit Israel on an educational trip.” Additionally, the vision speaks to the goal: “Birthright Israel aims to ensure a vibrant future of the Jewish people by strengthening Jewish identity, Jewish communities and connections with Israel.

This incredible initiative was founded by a global partnership in cooperation with Charles Bronfman and Michael Steinhardt, as well as the Israeli government, private donors, the Jewish Agency for Israel, and Jewish communities around the world. According to their 2018 annual report, over $95 million was donated from individual philanthropists, foundations and Jewish federations around North America.

The success of Birthright has been consistently analyzed and reported on by The Center for Modern Jewish Studies at Brandeis University. The most recent report of participants from 2015-2016 is compiled in \textit{The Jewish Futures Project (JFP): Beyond 10 days: Parents, Gender, Marriage and the Long-term Impact of Birthright Israel}. This study “documents Birthright’s long-term impact (up to 14 years post trip) and explores how it manifests itself in different subgroups: those with one versus two Jewish parents, men versus women, participants who are single versus those who are partnered, and those whose sole Israel experience was a Birthright trip.

\textsuperscript{10} Birthright Israel Website
• Birthright participants are more likely to feel a connection to Israel, have a Jewish spouse, raise children Jewish and be engaged in Jewish life, even a decade or more after the trip.

• In contrast to reports of “distancing” from Israel among young American Jews, Birthright’s effect on connection to Israel persists and is significant. Most JFP panelists feel at least “somewhat” connected to Israel, and participants report higher levels of connection than their nonparticipant peers.

• Birthright’s effect on participants with one Jewish parent is similar to that on participants with two Jewish parents. Compared to nonparticipants, Birthright participants who have one Jewish parent remain more connected to Israel a decade or more after their trip. They are also more likely to have a Jewish spouse.

• Birthright’s impact is evident even for participants who have had no other Israel experience, when compared to similar nonparticipants who have never been to Israel.

• Among those who are married, engaged, or living with a partner, Birthright has a positive impact on virtually all areas of Jewish engagement, including Jewish communal involvement, social and cultural engagement, and religious observance. Among those who are not partnered, Birthright has an impact on only a few measures of Jewish engagement.

• The impact of Birthright on partner choice is different for men and women. For men, Birthright participation has a positive impact on having a Jewish spouse, fiancé/e or partner; a positive impact on the likelihood of spousal conversion to Judaism; and a positive impact on the likelihood that children are being raised Jewish by religion, even if the other parent is not Jewish. These effects are weaker for women. This difference may be related to traditional Jewish views on matrilineal descent or gender dynamics in the contemporary “marriage market.”
• For men who participated in Birthright, their greater likelihood of marrying a Jewish spouse decreases as their age at marriage increases. Among men who married after age 30, there are no differences between participants and nonparticipants in terms of their likelihood of marrying a Jewish spouse. Whether the diminishing impact of Birthright on spousal choice as participants age is due to changes in participants’ priorities, their opportunities in the marriage market, or a combination of both is not clear.

In the summary of this report, the study concludes that “The impact of Birthright and the persistence of its effects over time; in the 18 years since Birthright’s inception, a series of systematic evaluation studies involving comparisons between program participants and equivalent others has consistently demonstrated that Birthright alters the trajectories of Jewish engagement of Jewish young adults. The findings of the present study parallel earlier work and add to the body of evidence demonstrating that the impact of Birthright persists over time. A decade or more after the trip, Birthright participants are more likely to feel a stronger connection to Israel, have a Jewish spouse, raise children Jewish, and be engaged with Jewish life than nonparticipants.”

One final note on Birthright. Although the conclusions above reinforce the goals and vision of Birthright, some of the trends effecting JFNA and the next generation can be seen in recent protests against exclusive focus of Israel at the center, ignoring Palestinians living on the West Bank or in Gaza. This divide was highlighted in a recent article by the New York Times© and like JFNA, the Birthright program will also have to consider what changes need to be made because of the shift in attitude.
The Birthright protests also highlight a generational divide between Jews who grew up with the constant fear of Israel’s destruction, and younger people today who may be more likely to take Israel’s existence for granted, and who focus instead on the millions of Palestinians left stateless by the conflict.

Just 6 percent of American Jews over the age of 50 believe that the United States gives Israel too much support, according to research by Dov Waxman, a professor of political science, international affairs and Israel studies at Northeastern University. But that view is held by 25 percent of Jews aged 18 to 29, the cohort that goes on Birthright trips.\(^{11}\)

Another brilliant and wide-spread innovation is **PJ LIBRARY**. Who would have ever thought that one of the biggest successes of Jewish innovative programming was inspired by Dolly Parton. According to their website, Dolly Parton’s Imagination Library is a book gifting program that mails free, high-quality books to children from birth until they begin school, no matter their family’s income.

After launching in 1995, the Imagination Library grew quickly. Originally books were only distributed to children living in Sevier County, Tennessee where Dolly grew up. It became such a success that in 2000 a national replication effort was underway. By 2003, Dolly Parton’s Imagination Library had mailed over one million books. It would prove to be the first of many millions of books sent to children around the world.

\(^{11}\) Stockman, Farrah, *Birthright Trips, a Rite of Passage for Many Jews, Are Now a Target of Protests*, The New York Times, June 11, 2019
In similar fashion, and with the encouragement of his daughter Winnie, Harold Grinspoon, a billionaire real estate tycoon from Western Massachusetts founded PJ (pajamas) Library in 2005 at the age of 76. Originally focused on Jewish families in his community, the program expanded tremendously to national and then international distribution coverage.

Harold Grinspoon is a wonderful example of how an entrepreneur approached innovation. His roots in Western Massachusetts, almost a century ago, brought him face-to-face with relentless anti-Semitism. But his cancer scare in 1991 forced Harold to face his mortality at the same time experiencing a renewed connection to his Judaism.

This sparked Harold to open a philanthropic foundation with a unique operational model. His programs are collaborations with Jewish communities in an effort to reach out to “unconnected Jews”, according to his wife. PJ Library was just the beginning.

In each community where present, PJ Library is a collaboration of local funders, Jewish communal organizations (Federation, JCC, Central Jewish Agency, etc.), local programming professionals and the Harold Grinspoon Foundation. According to the annual report of the Grinspoon Foundation (2013-2016) there are over 140,000 children enrolled in the program with almost 200 participating communities. The program has expanded to include Israeli preschool children with almost 200 enrolled in the what they call “Sifriyat Pajama”.
My absolute favorite grassroots development is **MOISHE HOUSE**. If this program had existed when I graduated from college, I am certain that I would have been involved. What a dream come true to have affordable housing and to create a Mini-Jewish community with my friends.

And Moishe House was a dream come true for Morris Squire, an octogenarian millionaire and David Cygielman a 20-year old with an idea. At a Hillel Shabbat dinner in 2001, Morris Squire asked a question of David out of the blue – “What would you do if someone gave you a million dollars, but you weren’t allowed to spend any of it on yourself?” With that, the two began a collaboration that resulted in an impressive and impactful innovation for young Jewish adults.

In December 2005, two houses opened in Oakland and San Francisco. The idea is simple. Provide financial incentives to young adults in their 20s so they can create Jewish communities with vibrant programming for their peers. Since that humble beginning the program has expanded immensely and (according to their 2018 annual report) there are 110 houses in 27 countries engaging 42,234 young people in 44 cities around the world.

Moishe House is changing lives for Jewish young adults. In a 2018 external study by Informing Change the following impacts on the lives of those involved were reported:

- Develop opportunities for Jewish leadership.

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13 According to their website, Informing Change is a strategic learning firm, that partners with clients—nonprofits and the philanthropic organizations that fund them—to develop their strategy and understand their impact.
81% of resident respondents now see themselves as Jewish leaders, compared to just 32% before they were involved in Moishe House.

- Connect people to other opportunities in the Jewish community.
  - 31% of respondents said Moishe House led them to take on leadership roles within other Jewish organizations or activities.

- Develop confidence around Jewish rituals
  - 81% of respondents said they now have knowledge and skills related to Jewish rituals, traditions and customs, up from 62% prior to involvement in Moishe House.

- Live an active Jewish Life
  - 74% of respondents said they are now living an active Jewish life (as they define it), compared to 51% prior to involvement in Moishe House.

What have these major programs taught us about innovation? I see several themes coming through. The first theme is that their origins were in response to a challenge. For BIRTHRIGHT it was spurred on by the fear that we are losing so many young Jewish adults to intermarriage. In the case of PJ LIBRARY, the motivation is how to bring Judaism to Jewish children with no barriers. As you saw in the case of MOISHE HOUSE, the founders just wanted to have a meaningful Shabbat experience with their friends.

Secondly, although not always an original intention, these innovative programs have become “partners” in some way with the federation system. This has been a great example of the power of the collective. Federations around the country have been making significant allocations to
BIRTHRIGHT in order to sustain its amazing impact. PJ Library utilizes the federation system as a partner in the coordination and distribution of the books. These federations also engage the community in PJ LIBRARY programming. Most significantly, federations are financial partners in the program in their community. Moishe House also receives funding from many of the federations around the country.

The last theme that I want to explore is the agility that enabled the success of these programs. Because they were either funded by the creators or started without major funding needed, the projects were able to reach their initial goals quickly. How does that reflect on the ability of JFNA to do the same? That is where I see that the culture of JFNA has to shift before it can be a leader in innovation for our Jewish world.
PART IV.

THE BIG IDEA

A. A Culture of Innovation

B. The Six-Point Plan
A. A Culture of Innovation

We can certainly learn from our previous ventures into developing a culture of innovation at JFNA. Although there is no continental model that is currently promoting innovation within JFNA it is time that we focus on a system that fosters creativity, innovation and backs that up with organizational support and funding. Many of the quotes about innovation speak to the idea that there are risks and failures involved in the process, you also have to see the potential in setting up an environment that allows for risk taking, encourages great ideas and supports both.

We should all do what we do best. JFNA and the federation system has been amassing the power of the collective for over 80 years, to save Jewish lives, help build the State of Israel and make a difference globally for our Jewish future. As Barry Shrage, retired president of the Combined Jewish Philanthropies of Boston said “many Jews and Jewish institutions still look to federations for leadership, unity, vision, opportunity and hope”. 14

B. The Six-Point Plan

The current status of JFNA, with all the demographic changes, new trends emerging and a new strategic plan has opened the door to a NEW BIG IDEA. Here’s what I propose to create a culture of innovation. It’s actually a six-point plan. My apologies for the obvious reference to six points (Star of David) but it just makes me feel good about the Jewish part.

1. **Hire a CVO – Chief Visioning Officer**

From my observation, the CEO position at JFNA requires a broad spectrum of leadership skills. The demands are enormous. This position could not and should not be responsible for the daily visioning and management of an innovation “laboratory”. My recommendation is that JFNA create an auxiliary group headed by a bold, creative leader that would report to the CEO.

As you have seen in the Strategic Plan, there are many things that JFNA does really well and those areas of excellence need to continue. The current professional staff at JFNA is very capable of continuing this great work.

The two “shifts” identified in the plan also need additional “care and feeding” at this time. I believe these shifts can be managed well, especially with the hiring of Eric Fingerhut as the new CEO of JFNA. I have seen the great work he did with Hillel International by upgrading these two visions for that origination and we are in good hands.

- Develop and leverage dashboards to achieve operational excellence
- Re-orient services and supports, with a special focus on Talent

However, to take hold of innovation for the 21st century, we need a leader who can spend most of her/his time outside of the box. There is also a special mindset of the innovators. The following quote is what Steve Jobs had to say about the leaders of innovation:

“Here’s to the crazy ones, the misfits, the rebels, the troublemakers, the round pegs in the square holes. The ones who see things differently; they’re not fond of rules. You can quote them, disagree with them, glorify or vilify them, but the only thing you can’t do is ignore them because they change...
things. They push the human race forward, and while some may see them as the crazy ones, we see genius, because the ones who are crazy enough to think that they can change the world, are the ones who do." – Steve Jobs

The first step is to get someone on board who can lead the charge for innovation in the 21st Century.

2. Don’t Duplicate – Collaborate

There are a lot of people and organizations out there doing great work for Jewish communities and for the Jewish people. In my research I came across major innovative programs. The three I identified earlier, Birthright, PJ Library and Moishe House are just the tip of the iceberg. The role of the CVO begins with an examination of the landscape so we are not trying to recreate the wheel. In addition to the research on current activities, the CVO should focus on developing relationships with the key individuals responsible for these efforts. Two other programs that I found intriguing are examples of what can be found once the landscape is explored:

- **One Table** – This program (according to their website) brings young adults together to experience Shabbat.

  “OneTable empowers people who don’t yet have a consistent Shabbat dinner practice to build one that feels authentic, sustainable, and valuable. OneTable is a national nonprofit funded to support people (21-39ish) looking to find and share this powerful experience.

  Our approach to Shabbat dinner is non-prescriptive. We encourage our participants to envision what their gathering might be, and we work alongside them to provide the support they need to create that result. OneTable’s primary goal is for emerging adults to become the producers of their own experiences, and for Shabbat dinner to become a platform for community building.”
We envision a whole generation of millennials slowing down, joining together, unplugging from the week, creating intention in their lives, and building meaningful communities.

- **LABA: A Laboratory for Jewish Culture** – Even though this program is very specific and involves a small number of participants each year its impact can be far reaching and most likely engages people outside of mainstream Jewish organizational life.

LABA: A Laboratory for Jewish Culture is a program of the 14th Street Y that uses classic Jewish texts to inspire the creation of art, dialogue and study.

**Part of LABA is the House of Study, an artist fellowship program for which around 10 culture-makers, a mix of visual artists, writers, dancers, musicians, actors and others, are brought together to study classic Jewish texts in a non-religious, open-minded setting.**

The fellows use the study to inspire work which is featured on this website and in our series of LABAlive events and performances. Every year LABA focuses its study around a theme. Previous themes include Paradise, Eros, Blueprint, Eat, Mother, Time, Beauty, and OTHER. This year’s theme is HUMOR.

Besides identifying existing innovative programs, another area of focus is the collaboration with Jewish foundations and their leadership who are involved in creative approaches to Jewish life. Many foundations not only support amazing programs but were also the originators of these ideas. The Harold Grinspoon Foundation was the idea generator, incubator and cultivator of several transformative programs in our Jewish world. Two programs that our Federation is integrally involved with are PJ Library© and Life & Legacy©. There is an incredible opportunity to learn and create synergy by developing relationships with foundation leadership and the Grinspoon Foundation is just one of many.
The other collaborative focus is with the mainstream religious Jewish movements as well as some of the smaller unaffiliated religious communities. There is a lot to be gained by keeping these organizations “in the loop”. They can also be future grant recipients of innovation program awards.

3. Engage Thought Leaders

The Federation movement, in particular, is at an interesting time in its history of professional leadership. A large number of brilliant Federation CEOs (or Presidents, Executive Directors, etc.) are retiring. They have built amazing programs in their communities and represent some of the brightest our field has to offer. They are also loyal and critical of the Federation movement, all at the same time. This gives them a unique perspective and makes them valuable thought leaders. Our innovative culture should “tap” this resource on a regular basis.

In my research I have found several top executives who have recently retired. The following examples only highlight a few, but we should get their input on our visions and ideas for the 21st century. I have listed some of these leaders below and comments they have made that reinforce their incredible value to our future:

- Steve Nasitir (Jewish United Fund of Chicago) – speaking about UJC (precursor to JFNA)
  
  Steve said that “not to have a place within the United Jewish Communities (UJC) system in which innovative ideas can be tried “puts the whole system in peril in the long term. It must have that kind of vehicle for engaging in some of the big ideas in Jewish life.”

• Barry Shrage (Combined Jewish Philanthropies of Boston)

“The struggle to define a Judaism of openness and beauty, of Torah, tzedek, and chesed, is a struggle that will require the combined talents of the best and brightest from all our communities working closely together. Even at a time of eroding influence, a global enterprise such as the federation is the only way we can build this dream. Even at our weakest, the federation system still has the power to mobilize enormous financial, intellectual and human resources in the service of the Jewish people and Jewish meaning. To serve the Jewish people in a time of rabid change, great opportunity, and newly emerging danger requires a clear vision of the Jewish future, the capacity to quickly mobilize community energy and resources, and the ability to shift course as circumstances require without losing sight of the future we are trying to build.”¹⁶

• John Ruskay (UJA Federation New York)

“Many people ask me how I can do this work with such apparent joy. Whether at the Society for Advancement of Judaism, the 92nd Street Y, Jewish Theological Seminary, or at UJA-Federation, my work has had a single mission: to enable larger segments of our community to experience the inspiring nature of Jewish life at its best.”¹⁷

• Lee Weunsch (Jewish Federation of Greater Houston)

The national Federation organization should have one visionary and strategic goal. If they believe, as we do (article was co-written), that there is still merit and value in a Jewish Federation, then a national conversation about the future of our Jewish organizational enterprise should begin in earnest. Launching such a conversation requires bold and courageous leadership willing to acknowledge the decline of the Federation system while challenging community leaders to rise to the occasion. Cheerleading is great but will fail if it’s only rhetoric. Grand ideas are important but will never materialize if the


organization has no capacity to implement. Annual showcase gatherings (i.e. the Jewish Federations General Assembly) are essential but not if a relative few show up.”

I would also like to mention two mentors who have retired from jobs at the head of federations. These two individuals only reinforce my contention that therein lies a wealth of information. I have spent countless hours discussing ideas great and small with my predecessor at the Jewish Federation of Greater Dayton, Peter Wells. He has so much to contribute and his passion has continued well beyond retirement.

Another wise sage is my mentor from the graduate program at Spertus, Gary Weinstein, formerly at the Jewish Federation of Dallas. His enthusiasm for the system is boundless and his ideas are relevant and meaningful. These are two retired federation executives who would be great additions to the “thought leader” cohort.

We should also draw input from innovation leaders outside of the Jewish community, whether they be from the academic, non-profit or business communities. In each of these arenas leaders have faced innovation challenges, cultures and successes. There is so much to be learned from them as well.

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4. **Hold a World’s Fair of Jewish Innovation – Bring Excitement to the General Assembly (GA)**

This is the headliner event. If done well, it could serve to launch an entire new generation of federation loyalists. But what does this World’s Fair look like?

The concept is simple and follows a similar structure to that of the GA. In fact, I envision the inaugural World’s Fair to run in conjunction with the GA. There are four main components: exhibitors, presenters and participants and one Main Event.

The exhibitors would represent the wide array of innovative programming in the Jewish world. Everyone would be invited to participate and have a booth that explains what they do. The criteria for what is innovative would have to be developed, but once that is established then a major push for inclusion would be set in motion. Because not every innovative program has deep pockets there would need to be some kind of subsidy so no one is excluded because of cost.

Presenters would all focus on “What’s New and What’s Working” in Jewish innovation. Some of the great new program creators that I have come across are just a few of the examples of people we could invite to speak:

- *JewBelong* creator Archie Gottesman
- *Unorthodox* podcast hosts Mark Oppenheimer, Stephanie Butnick, and Liel Leibovitz
- *Fitbit* co-founder, Eric Friedman
Not everyone has to be part of a Jewish innovative program, some of the speakers might represent the innovation process i.e. Eric Friedman). Like the GA, there would be keynote speakers, breakouts and workshops.

The participants are another very important consideration. Like the Young Leadership Biennial of my youth (when I was in my 20s), there would need to be special programming for the young adults. The social component is definitely important but not necessary to replicate the “party hard” atmosphere of TribeFest 2011. However, taking from the successes in their planning, many young adults loved that JFNA was the convener and not gatekeepers, including many outside organizations.19

The Main Event should be something exciting, fun and strategic. One of the best examples of funding innovation can be seen on television. The show “Shark Tank” takes superstars in the entrepreneurial world and uses these experts to decide what ideas really have potential and then funding follows. The federation movement has its own superstars and this is the best time to engage them. Maybe Mark Cuban would even agree to participate in the inaugural project.

What makes this format work is the attractiveness of the popular culture element that appeals to the general community. Who would present to these experts – any of the young idea makers. The program could start before the GA formal program begins and the winners could be announced at the closing plenary.

19 Berkman, Jacob, Jewish Federations Try a Sin City Adventure to Woo a New Generation of Donors, Chronicle of Philanthropy, 3/24/2011, Vol. 23, Issue 9,
5. **Spread the Word – Social Media, Marketing and Branding**

Let’s face it – this isn’t your father’s and mother’s communication anymore. For that matter, I’m in my early 60s and way past “cool”, so I’m not the right person to recommend how this is done. But in order to attract the younger generation we have to focus on their style of communication and the rest of us will follow. This involves the creative and effective use of social media, podcasts, phone apps and whatever else is trending.

Let’s also talk about marketing. How we present ourselves has improved tremendously in the 30+ years I have been associated with the Jewish Federation movement. However, I am not certain that we can explain who and what we are with a consistent and meaningful message across the entire system. With the launch of a major new project or department such as the “Innovation Collaborative” (or whatever it is called) we have the opportunity to increase our brand awareness. The new marketing strategy should involve highlighting what Federations do well and what is just around the horizon.

6. **Financially Support Innovation**

One other piece to this innovation puzzle is the funding for new positions and opportunities. In reviewing Jewish philanthropic foundations, I believe they are ideal funders to bring this project to fruition. Many family foundations have the agility to make decisions quickly. They also have the measuring systems in place to evaluate progress. With funding from an outside source the national system would not be taxed additionally, throwing off the budgets that have been established to accomplish some of the important shifts identified in the strategic plan.
V. THE SILVER BULLET
Here’s where my personal dreams for the future reside. My proposal is to create a SUPERFUND for Jewish Youth. Before I reveal the details I’d like to review the conditions that provide my motivation to make this drastic change in how we do business as an organization.

One of the most dramatic trends that drives Jewish communal life in the 21st century is our relationship with Israel. In my experience, the passions run the spectrum of vastly different viewpoints on Israel’s political landscape and how to support the Jewish homeland. With this sentiment in mind, it’s critical that our continental system review our financial commitment to supporting the programs connecting JFNA, the Diaspora and Israel.

If our history is the guide, then the global community needs to recognize where the vulnerabilities are and focus funding in those areas. They are not the same as before.

Our dollars should be directed towards that greatest needs facing us today. Those critical issues are global anti-Semitism and supporting Jewish life at home. Regarding the first concern it is evident that the largest Jewish communities around the globe are facing overwhelming anti-Semitism and anti-Semitic incidences are on the rise20. The power of our collective is to focus on protecting Jews in these communities and providing life-saving rescue and resettlement – our original mission.

However, the time has come to focus inward. My SUPERFUND idea originated in looking at what is happening in our community of Dayton, Ohio. Despite the trend in the last years of the 20th

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20 ADLGlobal 100: An index of Anti-Semitism
century and the beginning of the 21st century that found a mass migration of young adults from
our area (the children of the baby boomers) – Dayton’s job market is drawing Jewish families to
relocate here. Our Jewish community in Dayton is showing a revitalized engagement in our
programs and activities. As an example, our PJ LIBRARY program has seen an increase in
enrollment by 50% in the past five years. Our summer camp is growing and the JCC Preschool is
always at capacity. More telling is the number of wait list infants we have every year who are
trying to get in our preschool.

What is on the decline in our community is the enrollment in the Hebrew Day School. That coupled
with an increasing number of applications for summer camp scholarships sparked the idea that we
have to focus on supporting Jewish life right here in Dayton. In addition to the concerns mentioned
above, it was absolutely clear in the 2013 Pew Study that intermarriage is increasing, Jewish
participation in organized religion is declining and Jewish identity is declining in the younger
generations.21

How can we engage more of our Jewish youth in activities that will connect them to Jewish life
well into the future? The best way to do this is to make the institutions offering these programs
financially accessible FOR ALL. Let’s first take a look at one of the youth programs that have a
long-lasting impact on Jewish living. Probably the most impactful institution is Jewish overnight
summer camp.

21 A Portrait of Jewish Americans, Pew Research Center, October 2013
From a study conducted in 2011, the authors concluded that “the impact of camp – with few exceptions – is most profound on those Jewish identity markers that are the least common among today’s non-Orthodox Jewish adults. The four highest impact percentages as a result of summer camp attendance are found below:

- Feel very emotionally attached to Israel – 55%
- Attend synagogue monthly or more – 45%
- Always/usually light Shabbat candles – 37%
- Donated to a Jewish federation in the past year – 30%

Other impactful programs are Jewish Day Schools and Jewish youth groups.

After seeing how these activities support, enrich and sustain Jewish life, the question is why don’t more children participate? My contention is the cost. If you look at the reports on how much it costs to engage one child in Jewish life, then multiply that by the average number of children in Jewish families today it becomes evident that the most impactful and meaningful activities for children are completely inaccessible.

We need to put our money where it can do the most good for the largest number of people in order to BUILD on the wonderful Jewish life so many of us are so committed to. My suggestion is the development of a SUPERFUND for Jewish Youth. This concept is not revolutionary but extrapolated from other similar programs that had more singular purposes. Over twenty years ago

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a fund was created to help subsidize trips to Israel for Jewish youth. In Dayton it was called the Passport to Israel fund. The concept is that the federation makes an annual contribution to the fund and when the child is ready to utilize the money their cost for the program is significantly less.

Well SUPERSIZE that! Here’s how we create a SUPERFUND. Any Jewish family in Dayton can enroll their children at any time up to age 16. The cost to enroll them would be minimal. Every year the Jewish Federation of Greater Dayton (JFGD) would contribute to each child’s fund in an amount that I currently see as $1000. Since the fund would be invested in an interest producing vehicle, families might also want to make annual contributions. The fund would then be available for ANY Jewish experience that the participant wants to attend (until they reach age 18). Most importantly, the programs and activities available for fund support are completely pluralistic. Federation is supporting all denominational activities and acting as a true community partner. I see the fund being able to support the Day School, Religious school programs, JCC Summer Camp, any Jewish sleep away camp and all youth group activities.

If we look at the number of eligible children in our community we could estimate that figure to be close to 200, based on numbers enrolled in PJ LIBRARY, religious school and day school. If that figure is approximately 200 then we are committed to funding $200,000 to support the program on an annual basis. While wealthy philanthropists would be approached to support this endowed fund the annual campaign would be its primary resource. The hope is that the annual campaign would increase because of this wonderful new initiative. However, by refocusing our community dollars, we can fund the most important factor of our future – the youth of today.
VI. CONCLUSION

A. Final Thoughts

B. Resources
Final Thoughts

This project has involved a significant amount of research, and for that I am truly grateful. I have been working in this field for over 26 years and as a volunteer before that for 4 years. In preparation for writing this paper, I acquired tremendous knowledge outside of the practical day-to-day operations of running an Integrated Federation. The academic experience has truly enhanced my insights and perspectives, giving me greater confidence in my ability to make an impact in Jewish life.

With that said, I am 100% committed to seeing the SUPERFUND idea happen, if only in my community. Yet, I would love to see how this can be integrated together with the national JFNA initiatives. Working on this Capstone Project, I had hoped to find some possible inroads on how to accomplish the connection to our national system for the SUPERFUND. I am certain that I will continue to ponder, discuss and analyze opportunities to pursue that goal.
Resources

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