NOTHING IS EVER FOREVER

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Traditional fund-raising approaches that have worked so effectively with older donors must be modified if we are to secure younger people's interest and support for Jewish communal institutions. Today's donors demand greater visibility, recognition, and involvement in the projects that they fund. Targeted appeals and recasting Jewish needs in humanitarian forms are also essential.

Since the turn of the century, Jewish federations and institutions have raised funds along a specific set of prescribed parameters. This was possible because of the homogeneity of our communities. Stability of commonly held agendas and traditional Jewish methods of education — culturally, religiously, and ethnically — helped maintain the network.

Communal responsibility was central to our peoplehood, and external circumstances helped perpetuate the system successfully for hundreds of years. The Crusades, pogroms, the Holocaust, anti-Semitism, quotas, and the like — all outside forces — required that we seek both support from and satisfaction within our own group. This produced a cohesive entity known as the Jewish community that we maintain through a plethora of communal institutions. To maintain those institutions, we needed to raise money.

Three generations of donors have built and maintained the Jewish communal structure of today; yet, their children and grandchildren fall far short of the mark in maintaining, participating in, and building upon their forebears' priorities. This article examines the differences between older and younger donors and proposes several ways of modifying our fund-raising approaches to secure this new generation's interest and support for Jewish life and its institutions.

OLDER VERSUS YOUNGER GIVERS

Older givers tend to respond to traditional stimuli; younger ones by and large do not. Israel, our most effective fund-raising tool until recently, was the basis on which we raised the majority of communal dollars. However, because for the past 50 years we sold Israel *as* Jewish life, instead of selling Jewish life itself of which Israel was the highest priority, we face a serious problem today. We achieved tremendous success, but we have also planted the seeds of our long-term demise.

Recent experience has taught us about the tenuous nature of relying solely on Israel as the basis for fund raising. More Jews today are developing and voicing their opinions on Israel's settlement policy, administration of the West Bank and Gaza, and present or past political administrations. Couple this with the Bush administration's ability to deny loan guarantees to Israel until a more "sympathetic and understanding" Israel administration emerged, and a dangerous mixture is produced that under the right set of circumstances could result either in no foreign aid from the United States to Israel, the inability of the American Jewish community to do anything about it, or, worse, their support for the U.S. government's position against Israel. As a result, it is difficult to use Israel as either the exclusive message or even perhaps the most visible one.

Our largest contributors, who are usually older, have a strong emotional, personal, and/or historical attachment to Israel. As our "living historians" retire and pass away, they are replaced by less emotionally-tied-to-our-land givers. Leadership is changing generationally, and as leadership

changes, so must the message to which they will respond. Communities are now facing a dilemma. Our "Catch 22" is that the older givers — presently the more affluent ones who continue to give large sums because of their attachment to Israel — are sitting on the same boards as the newer leaders, people with more locally directed interests who have fewer dollars to contribute both now and in the future.

We have also successfully raised funds by capitalizing on the Holocaust, anti-Semitism, and the 1930s Depression. These experiences are the dramatic focus upon which we built our fund-raising drives. They are the tools to raise the funds, but are not the purpose for which they are raised nor to which they are allocated.

The primary factor that has enabled us to raise funds so successfully is our sense of Jewish communal responsibility and tzedakah. Today, our donors know what we expect of them — giving. However, they are now asking a question heretofore unasked and quite frankly unthought of by previous generations: What are you going to do for me?

FUND RAISERS AS ACCOMPLICES TO LOWERED GIVING

Today's generation of affluent Jews is financially richer than their forebears. They spend more conspicuously on themselves, and many do not consider community needs or philanthropy as a routine part of their lifestyle. The generation under 60 spends more, gives less, and wants greater recognition. In Jewish terms, the cost of the "aliyah" has cheapened, and they are buying a bargain. Yet, aren't we as fund-raisers accomplices to this change?

Until recently, when a Jewish community chose to honor someone, it was usually for a lifetime of service or a contributor's "magnus opus" — the once-in-a-lifetime hit. Today, we choose to honor people who can bring a crowd, and we hope that the honoree is sufficiently well liked to produce a sizeable contribution level among his or her peers. In other words, we honor people not for what they have done, but for what they will do personally or communally for us.

We as communal fund raisers need to seriously evaluate our complicity in supporting laypeople for visible leadership positions who either should not be in them because of their chosen lifestyle or because they have not earned them. What is morally right should count for something.

Donors from past generations often shied away from honors and visibility. Today's donors expect it, and some even seek it out. Joining an organization because of what it will bring the donor in terms of business, social acceptance, and the like is far more the norm today than in the past.

Of course, people would like to be acknowledged for who they are, not for what they give. Unfortunately, our society is not built that way. Yet, how many of our lay leaders are in positions of responsibility because they are committed to the cause, or they practice what they preach, or they possess other altruistic attributes versus they have money or know those who do?

The answer to the earlier question — What are you going to do for me? — is simply to make donors feel special. Do we say thank you for their help? Do we honor our paragons? Do we take the opportunity *at all levels* to recognize and make them feel special? We can no longer assume that our donors know we appreciate them. We must tell them and show our appreciation in as tangible a fashion as possible over and over again.

THE NEED FOR DONOR INVOLVEMENT

Today's donors have a greater desire to track their gifts from check to recipient. At the same time, there is occurring the apparent delegitimization of administrative overhead and staff costs. This is due to donors' desire to maximize their gifts to charity for the purpose they were given, not to the charity itself for the cost of doing business or of securing the gift. Although

this demand for accountability produces donor skepticism about the charity's cost of doing business, it also results in donor vesting. This trend is, in part, responsible for the crises we are experiencing in Jewish communal staffing today, as well as in general Jewish philanthropy.

Historically, Jewish communal workers were paid dramatically less than their counterparts in the for-profit sector. Today, that is no longer true. One result of the increase in professional pay and fringe benefits has been an increased demand by laypeople for quality performance measured against business standards. Like many businesses, the "bottom line" is what counts, and overhead is an important factor. The bottom line in non-profit organizations is not the amount raised, but the amount allocated. Today, Jewish institutions and their staffs are subject to many of the performance criteria as is any business. Because of these increased pressures to produce more with fewer dollars, many good future communal workers seek employment in other fields. The financial rewards are the same, and the pressure is less.

The need for greater donor visibility and recognition, coupled with cause-and-effect accountability, is evident in the Jewish community today. We are also seeing the waning of volunteerism and increased professionalization in areas heretofore reserved for volunteers. In their work lives, many volunteers are professionals, middle-level managers, or hold important positions in a service industry. In many of our Jewish households today both spouses work. They have less free time, and they would rather spend that time at leisure activities or with family than soliciting for money. This factor has resulted in fewer volunteers, poorer card coverage, and increased staff costs to pay someone for what had been a volunteer's job. When staff costs rise, and fewer dollars are raised, a crisis occurs. Look at the Los Angeles federation as evidence of this crisis.

Our first national exposure to cause-and-effect giving occurred during the Project Renewal campaign that began in 1979. Donors who had previously given to their federations annually for the United Jewish Appeal then had the opportunity to become involved for the first time in a meaningful way with the neighborhood or community with whom they had been twinned by UJA. The donor now had the chance to make a personal gift, pay it over multiple years, choose a project, and follow that project through to its successful conclusion. Although the trend for multiple-year payout continued through a number of subsequent special campaigns, such as Operation Exodus, and Exodus II, the trend toward increasing the donor's personal relationship with Israel begun by Project Renewal has ceased in most cases. Yet, for local communities that have chosen to maintain those relationships, a great reward has been reaped — continued meaningful involvement by the donor.

The smaller, Israel-based fund-raising institutions have known the advantages of donor-recognized giving for years and have been raising more funds successfully on this basis. Many local community institutions are following this model and are looking to ways to endow ongoing projects and structures through designated giving. The Jewish community needs to become very good at this form of fund raising quickly because there are an increasing number of major pulls from the general community, such as colleges, hospitals, and cultural institutions, that appeal to our donor base, as well as to the general community.

TARGETED VERSUS MASS APPEALS

The donor base is decreasing or being replaced by lower-level givers. In addition, competition from other philanthropies is growing more effective. Comparing the wealthiest Jews in your community with your list of largest givers should quickly tell you how few are found on both lists. If this is the case in your community, targeted

giving could be an answer to increasing the convergence of the lists.

We have operated under the historical assumption that all Jews have a responsibility to provide tzedakah, even the poorest among us. This principle is no longer operative. The rules that should be in effect for all Jews are not. With the intermarriage rate greater than 50%, with fewer than one in six receiving any Jewish education, and with fewer than one in ten affiliated with anything Jewish, on what basis should we operate under the old rules? The potential donor and asker are in the same stadium, but they are each playing a different game.

The mass appeals that we still conduct in our annual campaigns and Super Sundays involve large numbers of staff members and even more volunteers. We do them based on the premise that all Jews should have an opportunity to help the community financially. Does this effort raise more dollars than targeting a select group? Most likely not. Donors buy off their consciences with token gifts, and volunteers asking for the gifts feel their Jewish communal responsibility has been fulfilled because they have done their duty. Involvement on both sides ceases until next year.

We need to concentrate on a more select audience, even though the services or projects for which we solicit funds are geared for wider use by a more diverse group than the contributors. We would be better off using lay and staff time to target and identify special individuals, spending our efforts involving those identified, and securing ultimately a far larger gift than the way we now raise money. Special individuals are those who have sufficient funds to contribute in large quantities. Good intentions do little to help causes. Money helps causes. This might sound like heresy. Yet, not to question our historical fund-raising efforts could doom us to greater failure in the future.

The multiplicity of campaigns within any given community is beginning to take its toll, and donors are rebelling against the number of annual requests. One way to handle this problem is a cooperative, coordinated effort among naturally aligned Jewish fund-raising bodies, such as the communal institutions. Those givers who are unilateral donors, such as for their synagogue only or for Torah education only, would then be contacted only by the constituency to which they will respond. For the many who are multiple contributors to multiple causes, an opportunity for cooperation exists. Approaching such donors in a coordinated effort in behalf of all the organizations can garner a much larger gift than a series of individual appeals. This unified appeal for all organizations would not be appropriate for annual fund needs, but would be the best approach for capital and endowment needs.

Being accountable to donors is a better way to raise funds in the long run than our present generic approach to communal fund raising with its appeal to the greater good and the welfare of the community. Contributions into the "pot" might help the community in the short run to meet its needs, but they do not result in donor vesting. A donor is vested when his or her name is on the project. We might have to give up some decision-making authority to secure the necessary funds our communities will need by involving the donors in a "gift-to-completion" approach if we want their money in the future. Donors want to ensure the viability and vitality of the projects to which they give funds. To do so, they need to become involved *and* give money and possibly to get others to do the same. If we are lucky, the next generation will become involved as well because the project or cause was meaningful to their parents and they want to see it continue.

RECASTING JEWISH NEEDS IN HUMANITARIAN FORM

Despite the recent success of our special campaigns, we are not raising more funds today than in the past for our ongoing needs. A dwindling donor base and

contribution level have been brought about by a number of factors: greater general community acceptance of Jews, less Jewish observance and knowledge of Judaism and its precepts, and fewer barriers to participation in the general community are all responsible. Being honored by the symphony in a community is often more highly valued than being honored for one's devotion to Jewish music. Chairing the United Way carries more "yichus" than being general campaign chairperson for the Jewish community.

It is not surprising that Jews are gravitating toward more general areas of satisfaction and more public forms of philanthropy. Many American Jews are beginning to support general communal institutions to the exclusion of Jewish ones. In the global message of Judaism, we Jews have somehow lost the Jewish message for ourselves. Jewish institutions and causes are as worthy of support as any institution or cause in the community. The Jewish poor and elderly are as worthy, legitimate, and as righteous as any other humanitarian cause.

The Jewish message, like milk, has been homogenized; it must now be "humanitized." By explaining our specific Jewish cause in terms of its general benefits to humanity, we give our cause increased legitimacy and a greater chance of success. This is especially true when appealing to "generalized community" Jews who want to think of themselves as members of society, rather than as Jewish members of society.

The shift within the Jewish community from an entrepreneurial base to a predominance of professionals and the waning of major financial growth opportunities will result in fewer discretionary dollars being available in the future than now. Couple this with a less caring future generation, and you have an impending disaster. Appealing to our older generation of givers who care and are now in the process of selling their businesses is of paramount importance now. In 10-15 years, it will probably be too late. Our population of large givers is aging quickly.

THE COMMUNAL DILEMMA

In many of our communities, we are now engaged in serious dialogue about our Jewish community's network of services. Traditional institutions, such as Jewish Community Centers, Jewish hospitals, and even old age homes, are no longer routinely funded. We are looking at the Jewish services we offer versus the services we offer under Jewish auspices. Why? Simply because our dollars are shrinking, as is our donor base. We now ask questions never before asked, such as should a JCC survive that has few Jewish members and offers mostly athletics and little Jewish content just because a successful bingo game provides the money to operate it? Or, look at the changing mission statements of federations today. Are we going to be like the March of Dimes, which when the cure for polio was found and their original purpose lost its value, created a new purpose (birth defects), rather than go out of business? Is federation's role to raise funds for institutions, such as the UJA and local agencies, or is it to provide services? Do we allocate based on Jewish needs or on historically what agencies received from past campaigns? Should we allocate to agencies or to Jewish needs? Should federations take on the community role of facilitator? Should we be allocating funds to synagogues? These and many other questions remain to be discussed. The time to debate them is *now*.

Nothing is ever forever, and the system we have used to operate the financial Jewish life of our communities is waning. We change or die. Have we existed so long as a group because we are stiff-necked or because we are flexible? It is interesting to note the apparent contradiction of our peoplehood — a stiff-necked people who are adaptable. In this context, this phrase can be ended either with a period or a question mark. It is up to us to determine which punctuation mark will be correct.