

# JEWISH CONTINUITY THROUGH GENERATIONAL PHILANTHROPY

## A Case Study

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*The family endowment fund described in this article has developed into an effective instrument of Jewish philanthropic continuity and a way to promulgate Jewish values. Participation in the fund has strengthened family relationships, Jewish identification, and Jewish involvement, both in fund raising and in volunteering, of its members.*

One of the greatest challenges facing the Jewish community, and especially the institutions serving that community, continues to be the loss of the financial support of emerging generations of young people. Although they are as philanthropic as their antecedents, they tend to support a broader base of charitable causes, thereby lessening their philanthropic impact on Jewish communal enterprises, both in dollars allocated and volunteer leadership provided. Much has already been written about the causes of this phenomenon, and it is not my objective to add to that body of conjecture. My purpose is to present one case that may provide a model for dealing with the problem successfully.

The Mazer Family Fund (MFF) was established in the spring of 1988 by agreement between the Jewish Communal Fund of New York (JCF) and UJA-Federation of New York (UJA-Fed). The decision to create the Fund resulted from discussions between the executive vice president of UJA-Fed and a member of the JCF board, a niece of the late Joseph and Ceil Mazer, whose legacy included a substantial endowment at JCF. The income from this endowment was proposed as the source of funding for the MFF. The goal was to initiate a program that would transfer the responsibility for Mazer philanthropy from generation to generation. The new fund would involve the fourth generation of Mazers since Abraham Mazer, patriarch of the family, began his

philanthropy in the early 1900s. It was proposed that several of the younger members of the family, who ranged in age from their early twenties to their early thirties, would work with seasoned volunteers of UJA-Fed to receive and evaluate proposals for special projects submitted by agencies of UJA-Fed, both domestic and overseas, and then to make allocation decisions using a process similar to that used by the Planning and Allocations Committee of UJA-Fed. It was hoped that by working closely with these experienced volunteers, the young people would acquire the ability to make knowledgeable decisions about the allocation of philanthropic resources. This project was assigned to the Planned Giving & Endowments Department.

Although this initial intent remains important, several other objectives emerged as the MFF began to operate. They included:

- strengthening of the family
- development of personal and communal Jewish identity
- increased UJA-Fed campaign participation
- development of and participation in Jewish communal leadership
- intelligent and timely allocation of the fund's resources

This article examines the accomplishments of the MFF as measured against the goals listed above.

### **STRENGTHENING OF THE FAMILY**

When the MFF was first formed, many of the family members asked to participate had little or no personal relationship with each other, although among them were cousins and siblings. In some cases, personal introductions were necessary. Over the past six years, meetings of the fund every six to eight weeks have provided an opportunity for contact that has extended to socializing between meetings. A genuine caring for and about each other has developed, including even those family members who have relocated to other parts of the country and participate in the MFF by mail. One family member has moved back to New York and has joined the fund committee.

### **DEVELOPMENT OF PERSONAL AND COMMUNAL JEWISH IDENTITY**

At the fund's inception in 1988, the family members had few contacts with the Jewish community. This was true even of those whose parents were deeply involved in either volunteer or professional capacities. In fact, in funding decisions made by the MFF in its first three years of operation, little emphasis was placed on Jewish programs. The priorities of the fund centered on crisis intervention in the human services area. After three years of operation, in the spring of 1991 the chairperson of the Fund, a family member, suggested that the family members meet together on their own to consider a specific mission for the Fund.

The retreat was facilitated by Michael J. Austin, dean of the University of Pennsylvania School of Social Work. The agenda included a review of goals for the retreat, clarifying the distinction between vision and mission, assessing the group process, and developing a mission and vision statement for the Mazer Family Fund. After the retreat, each of the next several meetings of the Fund included some time devoted to an examination of Jewish values and how the MFF might address the areas of concern adopted by the group at the retreat. They

then decided to hold a special meeting at which a leader from the Center for Learning and Leadership (CLAL) was invited to facilitate a further discussion of Jewish identity and continuity; nearly all the family members and several UJA-Federation representatives attended this meeting.

During the summer that followed, several subcommittee meetings were held to review the results of that session, and planning took place concerning how the MFF committee would approach the submission of projects in the coming months. As a result of the retreat and the CLAL session, the family members concluded that the fund should emphasize Jewish identity and continuity, areas that currently command a major focus of resources and energy from federations. In fact, the Mazer family's decision preceded the official decision of UJA-Federation of New York to commit itself to Jewish continuity. The MFF adopted the following mission statement: **The Mazer Family Fund is committed to enhancing the vitality of the Jewish people in New York and Israel by helping to create, promote, and support programs that will enable young people to discover a greater sense of meaning in being Jewish.**

In the grants that were made subsequent to the adoption of the mission statement, one can see not only a change in direction but a genuine focus beginning to emerge.

### **INCREASED UJA-FEDERATION CAMPAIGN PARTICIPATION**

When the MFF was established, only one of the family members was making an annual contribution to the UJA-Fed campaign. At the retreat, the family resolved that each person had an obligation to contribute to the annual campaign to the best of his or her ability. As of this writing, of the eight family members serving in New York, seven have made contributions in 1995 ranging in size from \$350 to \$2,000 for a total of \$8,000. The only noncontributor as of this writing is a family member who recently moved to New York, and she will be en-

couraged to participate in future campaigns.

### **DEVELOPMENT OF AND PARTICIPATION IN JEWISH COMMUNAL LEADERSHIP**

At the fund's inception the family members demonstrated little in the way of personal or communal Jewish identification. Some were intermarried, and none were affiliated with Jewish communal agencies or services. For many of the family members, their knowledge of Jewish traditions and practices was very limited. All of this was true despite the fact that the parents of several of the young people were substantially involved in Jewish communal activities.

The picture is very different now. Several MFF family members serve on agency boards and/or committees of UJA-Fed as a direct result of their exposure to Jewish communal life through the MFF. In addition, three members joined the UJA-Fed President's Mission to Israel, and seven participated in a special MFF mission to Israel.

Of course, all of the above could not have happened without the participation of the members of the committee who were appointed by UJA-Fed to serve alongside the family members. These UJA-Fed representatives all had extensive experience in the federation planning and allocation process. There was representation from both domestic and overseas divisions of UJA-Fed, as well as individuals from the young leadership division who could easily identify with the age and social groups represented by the members of the family. And, of course, various staff members of the UJA-Fed who were involved in Jewish education, Jewish continuity, resources development, and overseas planning and allocation became an integral part of the MFF operation.

### **INTELLIGENT AND TIMELY ALLOCATION OF RESOURCES**

Tables 1 through 4 indicate clearly how the funding priorities have changed since the

Fund's inception and particularly since the retreat and subsequent attention paid to its Jewish mission in 1991.

Table 1 presents allocations made in the first three years of the fund's operation. Although it indicates a willingness and ability to make meaningful distributions of what were then significant available funds, these distributions were not focused except in the area of Soviet resettlement and absorption. The family members were heavily influenced by the UJA-Fed members of the funding committee who saw these allocations as a way to respond to the severe resources drain being placed on the regular funds of UJA-Fed. During this crisis period of refugee resettlement, most dollars were going to Israel through Operation Exodus. In fact, Table 1 indicates a special \$250,000 grant, recommended by the MFF from its endowment principal, made after a stirring presentation to the Fund by a leader of Operation Exodus and JCF. No other area of concern received more than 10% of the funds distributed in the first three years. During this time the MFF had no real focus. Subsequent to the retreat and the adoption of the mission statement, the MFF decided that it should have a specific identity. That identity has begun to be realized over the past three years, as seen in Tables 2 and 3.

At first glance, the full six-year report as seen in Table 4 suggests a continued focus on domestic Soviet immigration. However, this is misleading, as the results are skewed due to the extraordinary weight of the dollars available during the fund's first three years. When the MFF was established, there were substantial accumulated uncommitted dollars available to the fund committee, as compared with the more modest distributions possible during the most recent three-year period. The fund now expends only the current earnings on its investment, which is very conservative and is controlled by JCF.

A more accurate assessment of the changing focus of the Fund can be made by comparing the percentage distributions over

Table 1. Three-Year Breakdown of MFF Allocations: 1988-1991

1990-1991	Soviet Immigration	Aids	Children & Youth	Medical	Aged	Jewish Identity	Misc	TOTALS
Domestic	185,000	25,000	25,000	-	23,000	-	60,000	318,000
% of Domestic	58.2	7.9	7.9	-	7.2	-	18.9	100
Overseas	(250,000)*	-	-	-	-	-	20,000	20,000
% of Overseas	-	-	-	-	-	-	100	100
TOTAL	185,000	25,000	25,000	-	23,000	-	80,000	338,000
% of TOTAL	54.7	7.4	7.4	-	6.8	-	23.7	100

1989-90	Soviet Immigration	Aids	Children & Youth	Medical	Aged	Jewish Identity	Misc	TOTALS
Domestic	161,250	60,508	-	17,585	38,000	12,500	95,000	384,843
% of Domestic	41.9	15.7	-	4.6	9.9	3.2	24.7	100
Overseas	-	-	143,000	-	-	-	-	143,000
% of Overseas	-	-	100	-	-	-	-	100
TOTAL	161,250	60,508	143,000	17,585	38,000	12,500	95,000	527,843
% of TOTAL	30.5	11.5	27.1	3.3	7.2	2.4	18.0	100

1988-1989	Soviet Immigration	Aids	Children & Youth	Medical	Aged	Jewish Identity	Misc	TOTALS
Domestic	114,800	-	45,860	17,585	38,000	-	60,000	276,245
% of Domestic	41.6	-	16.6	6.4	13.8	-	21.7	100
Overseas	-	-	-	31,910	-	-	-	31,910
% of Overseas	-	-	-	100	-	-	-	100
TOTAL	114,800	-	45,860	49,495	38,000	-	60,000	308,155
% of TOTAL	37.3	-	14.9	16.1	12.3	-	19.5	100

\*This amount represents a special grant from the Mazer Endowment principal for Operation Exodus. Because the funds were not drawn from the regular allocation pool, this amount has been omitted from all totals and other calculations.

the two time periods (Table 3). This table clearly indicates the marked change in direction that has taken place over the past three years. Funding in all areas, except for Soviet immigration and Jewish identity, has decreased significantly. Although funding for Soviet immigration has increased as a percentage of total dollars allocated (+33%), the actual dollars allocated to this area have been reduced by \$84,000 (-18.4%). At the same time, funds allocated to projects dealing with Jewish identity have increased both when measured by per-

centage of dollars allocated (from 1.1% to 22.4%) and by actual dollars allocated (an increase of over 1275%).

Table 2, which contains allocations for fiscal year 1992-1993, requires some explanation. During that year, the MFF was struggling with its identity and mission, and as a result, the committee was reluctant to make funding decisions before its focus was clarified. Thus, only one project, a final renewal of a Soviet immigration projects, was voted out of the fund committee. However, it was in 1993-1994 that the fund began its

*Table 2. Three-Year Breakdown of MFF Allocations: 1991-1994*

1993-1994	Soviet Immigration	Aids	Children & Youth	Medical	Aged	Jewish Identity	Misc	TOTALS
Domestic	105,000	-	-	-	-	125,000	0	230,000
% of Domestic	45.7	-	-	-	-	54.3	-	100
Overseas	-	-	-	-	-	35,000	-	35,000
% of Overseas	-	-	-	-	-	100	-	100
TOTAL	105,000	-	-	-	-	160,000	-	265,000
% of TOTAL	39.7	-	-	-	-	60.3	-	100

1992-1993	Soviet Immigration	Aids	Children & Youth	Medical	Aged	Jewish Identity	Misc	TOTALS
Domestic	110,250	-	-	-	-	-	-	110,250
% of Domestic	100	-	-	-	-	-	-	100
Overseas	-	-	-	-	-	-	-	-
% of Overseas	-	-	-	-	-	-	-	-
TOTAL	110,250	-	-	-	-	-	-	110,250
% of TOTAL	100	-	-	-	-	-	-	100

1991-1992	Soviet Immigration	Aids	Children & Youth	Medical	Aged	Jewish Identity	Misc	TOTALS
Domestic	161,000	25,000	25,000	25,000	47,000	-	35,000	318,000
% of Domestic	50.6	7.8	7.8	7.8	14.8	-	11.2	100
Overseas	-	-	20,000	0	0	0	0	20,000
% of Overseas	-	-	100	-	-	-	-	100
TOTAL	161,000	25,000	45,000	25,000	47,000	-	35,000	338,000
% of TOTAL	47.6	7.4	13.4	7.4	13.9	-	10.3	100

heavy concentration in the area of Jewish identity and continuity. That concentration continues today; projects approved for 1994-1995 include \$156,000 for programs in that area (including \$26,000 for overseas) and only \$10,000 in Soviet immigration projects.

**SUMMARY AND CONCLUSIONS**

Would these same dollars have been available and eventually allocated similarly by the JCF endowment if the MFF had not been created? I believe the answer to this question is no, for the JCF does not have the

mechanism to accomplish what has been accomplished by the MFF. Perhaps it may have made the dollars available to UJA-Fed, which then could have distributed them according to its regular allocation process. However, it is arguable whether UJA-Fed could have maintained the level of encouragement for project submission that the MFF generated. Projects would not have received the attention to detail that the MFF, with its focused agenda, was able to provide. Nor would there have been the interaction between potential funder and grantee that occurred with the MFF. And, as the MFF has developed, it has begun to

Table 3. Three-Year Analysis of MFF Allocations

1991-1992 through 1993-1994								
	Soviet Immigration	Aids	Children & Youth	Medical	Aged	Jewish Identity	Misc	TOTALS
Domestic	376,250	25,000	25,000	25,000	47,000	125,000	35,000	658,250
% of Domestic	57.2	3.8	3.8	3.8	7.1	19.0	5.3	100
Overseas	-	-	20,000	0	0	35,000	0	55,000
% of Overseas	-	-	36.3	-	-	63.7	-	100
TOTAL	376,250	25,000	45,000	25,000	47,000	160,000	35,000	713,250
% of TOTAL	52.8	3.5	6.3	3.5	6.6	22.4	4.9	100

1988-1989 through 1990-1991								
	Soviet Immigration	Aids	Children & Youth	Medical	Aged	Jewish Identity	Misc	TOTALS
Domestic	461,050	85,508	70,860	35,170	99,000	12,500	215,000	979,088
% of Domestic	47.1	8.7	7.2	3.6	10.1	1.3	22	100
Overseas	(250,000)*	-	143,000	31,910	-	-	20,000	194,910
% of Overseas	-	-	73.4	16.4	-	-	10.3	100
TOTAL	461,050	85,508	213,860	67,080	99,000	12,500	235,000	1,173,998
% of TOTAL	39.3	7.3	18.2	5.7	8.4	1.1	20	100

\*This amount represents a special grant from the Mazer Endowment principal for Operation Exodus. Because the funds were not drawn from the regular allocation pool, this amount has been omitted from all totals and toher calculations.

realize goals and embody values that offer great hope for the future of the Jewish community and its leadership. Although the impact of the dollars allocated by the MFF has been great, that hope is equally vital to our community.

The members of the fund committee take their responsibilities very seriously. Funds are allocated, in all instances, after personal presentations by submitting agencies and/or site visits to the agencies. The programs and the agencies are subjected to close scrutiny by fund committee members. Many submitted projects have been rejected, many have been modified as a result of work of the committee, and in some cases members of the committee have caused projects to be formulated and submitted after evaluation of community needs. The cost to the UJA-Fed of managing the Fund has been negligible. Total estimated management costs,

including staff time, have amounted to less than \$10,000 annually, according to a report prepared by the Budget and Finance Department of UJA-Fed.

Lest the reader conclude that the work of the MFF has resulted in only positive effects and that the problems of Jewish continuity, at least for this group, have been resolved, this is not the case. Unfortunately, intermarriages still continue in the group. Since the establishment of the Fund, there have been two marriages, one of which was an intermarriage, and another marriage is contemplated, which is also an intermarriage. So far, the several married couples serving on the committee have only a small number of children, and it is too early to assess the level and extent of family participation in Jewish life, including the provision of a Jewish education for these children.

Nevertheless, the Fund has exceeded its

*Table 4. Six-Year Summary of MFF Allocations*

	Soviet Immigration	Aids	Children & Youth	Medical	Aged	Jewish Identity	Misc	TOTALS
Domestic	837,000	110,508	95,860	60,170	146,000	137,500	250,000	1,633,338
% of Domestic	51.2	6.8	5.8	3.6	8.9	8.5	15.2	100
Overseas	(250,000)*	-	163,000	31,910	-	35,000	20,000	249,910
% of Overseas	-	-	65.2	12.8	-	14.0	8.0	100
TOTAL	837,300	110,508	258,860	92,080	146,000	172,500	270,000	1,887,248
% of TOTAL	44.3	5.9	13.7	4.9	7.7	9.2	14.3	100

\*This amount represents a special grant from the Mazer Endowment principal for Operation Exodus. Because the funds were not drawn from the regular allocation pool, this amount has been omitted from all totals and toher calculations.

goals, even those not stated at the inception. The MFF should serve as a model to other families in the Jewish community looking to create an instrument of Jewish philanthropic continuity and a way to promulgate Jewish values, especially in cases where there is some doubt about that continuity. For this model to be replicated, however, these conditions must be in place:

- a sponsoring institution, such as a federation, to provide the setting and the professional staff support
- a group of experienced community volunteers to provide guidance
- a family or families with young people desirous of participating in the program
- a source of "substantial" funds, without which the process is meaningless
- a commitment of time, energy, and resources by both the sponsoring agency and the family or families
- patience, as the development of community leaders must be measured over a period of years

On a personal level, the MFF has given me the opportunity to work with and assist in the development of a remarkable group of

young people who have come together as a family and as a Jewish communal body. They will continue to serve the Jewish community, wherever they may eventually settle.

#### ACKNOWLEDGMENTS

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