

August 4, 2006

“... the courage to do something speculative in an intellectual connection – that is the greatest privilege of private philanthropy.”¹

That is the privilege that the late Jim Joseph has made available to the trustees of the foundation that bears his name. It is accompanied by significant responsibilities and challenges. The rather broad mandate inherent in the trustees' construction of the by-laws, calling for the promotion, encouragement, and provision of education to Jewish youth in the United States, creates a wide field of vision, or, as one might say in Hebrew, “*sde yeriah*”- a field of fire, in terms of where the philanthropic emphasis can be placed.

What should be expected of professionally run private philanthropy? It is not a simple question; philanthropy can be practiced in a host of different ways. Let us compare a professionally managed foundation with how an individual donor, of some wealth, decided how he wished to engage in philanthropy. On Wednesday evenings, for many years, Mr. Herbert Joshua would open the doors of his flat on Ahad Ha'am Street in Jerusalem, and sit with his ample checkbook responding to petitions and proposals from individuals and organizations that were put to him. He did no studies, there was no research, and very little due diligence, but there was significant philanthropy distributed on those Wednesday evenings. It is certainly not how the Jim Joseph Foundation wishes to pursue its mission. Rather, you are obliged to think strategically and develop a coherent program and the means to implement it, for reasons I will touch on below. You have defined your “field of fire” quite broadly, and in calling upon us, you wish to learn about potential opportunities in the tricky field of developing leadership skills in Jewish youth.

You asked that we assume that you can direct \$20 million annually in the areas that you have outlined in the foundation's by-laws. You should be aware that Jewish education, broadly defined, for youth ages 3 – 25 probably entails the annual expenditure of \$3 - 4 billion. That being the case, what can your foundation hope to accomplish in such a vast sea of activity? That is the initial challenge connected to the privilege you have been afforded: how can your trustees and management develop the

¹ From a letter of Aby M. Warburg, founder of the Warburg Institute, London, to his brother Felix, in the early 1900's.

confidence and creativity to be speculative and risk taking in an already crowded field of Jewish philanthropy? It will require difficult decisions, for if your new philanthropic foundation cannot find a special niche, it will wander, adrift in this vast ocean of educational activities, and perhaps not make the mark that its benefactor had hoped for. How does your new group make a difference and become a positive factor: only by being willing to more narrowly define, within your broad spectrum of philanthropy, where you can be most effective.

The experience that I have gained over the past 25 years has motivated our philanthropic interests, AVI CHAI and Keren Keshet, to follow narrow and disciplined paths. It is one that I highly recommend to you.

There may be ways to more sharply define your goals. You have complicated the task by weaving in the concept of development of Jewish leadership skills. It is a difficult term to define, for it comes in a host of guises. Leonard Bernstein was a leader, he was Jewish; Mark Rothko was a leading Jewish artist, as is Lucien Freud. We could pick any number of Jewish scientists in each of the scientific disciplines and look upon them as Jewish leaders. However, my assumption is that your definition centers principally on Jewish communal leadership, writ large - individuals who will lead Jewish organizations or lead the Jewish community through their intellectual output, not unlike several of those people whom you have invited to participate in your foundation's retreat.

How are Jewish leaders created? If I knew the answer, I would share it with you; but I do not, and I am not sure that anyone else can provide the answer. What I do know, however, is that one cannot aspire to Jewish communal leadership without possessing basic Jewish skills and Jewish passion. These elements must be woven into the fabric that enables one to don the mantle of Jewish leadership.

Permit me to outline several of these Jewish skills, attributes and passions that will enable you to begin to narrow your field of vision, perhaps even enable you to consider some of the niches that I spoke about earlier, and, therefore, begin the process of outlining how your resources might be marshaled most effectively.

First, **understanding of the covenant with the Jewish people as it is reflected in Jewish texts and history**: It goes without saying that Jewish leaders must understand the wellsprings of their people and their faith. It is a basic requirement that Jewish literacy be a hallmark of every Jew, and without doubt, part of the tool bag of a Jewish leader whose

vision must draw on a distinctive Jewish way of thinking about values, relationships, and issues of the day.

Second, **a commitment to the centrality of the State of Israel:** We are now, and from time immemorial, been called *Bnei Yisrael* – the Children of Israel. Our history has forever been bound up with the Land of Israel, and when Mr. David Ben Gurion proposed that name for a fledgling country, he knew, ever so well, the monumental choice he made in the name Israel; thereby binding Jews worldwide to it. Jewish communal leaders must understand the role the State of Israel plays in Jewish life, and the privilege that our generation, and generations to come, have been given by being linked in name, spirit, and in an emotional bond to the third Jewish commonwealth.

Third, **Hebrew language proficiency:** In order to fully appreciate Jewish content and connect with modern Israel in a complete way, Jewish leaders should be knowledgeable about, perhaps even literate, in both modern and biblical Hebrew. They must feel comfortable with the language, its daily use on the streets of Jerusalem, and its use as a link binding the Jewish people through the vast riches of ancient Hebrew texts.

Fourth, **a sense of Jewish people-hood:** In order to assume or aspire to a role as a Jewish communal leader, one should possess a keen sense of Jewish mutual responsibility, or, as we say in Hebrew, *kol Yisrael arevim zeh ba'zeh*.- the concept of how all of us are responsible for one another, and how we are responsible to and for the Jewish commonweal, whether it be at our university, our school, our city, or, broadly speaking, an identification with Jews everywhere. This sense of peoplehood is linked to the centrality of Israel, and leaders will increasingly face the challenge of ensuring that Jews in Israel and the Diaspora share a common sense of what it means to be Jewish.

Lastly, **a sense of commitment toward involvement in Jewish communal causes:** All of the preceding should be accompanied by a passionate ambition to advance the Jewish future and the skill to stimulate within others a sense of the potential of Judaism, and mutual caring and involvement among Jews, to enrich the Jewish nation and ultimately the world at large. That will be the binding or catalyst that will create the potential for Jewish leadership.

How are these Jewish skills to be acquired? How can we assure that Jewish leaders will emerge for generations to come from your foundation's efforts, and how can the Jim Joseph Foundation develop these leaders? Our choices are rather limited. Jewish leadership cannot come solely

from an empathy for universal values, weakly grounded in Jewish texts, interpreted solely by the “sovereign self.” How can a positive set of mutually reinforcing Jewish knowledge and emotion be amassed? The Jewish community has a series of windows, opportunities to impact and affect Jewish youth ages 3 - 25. Permit me to list them below:

- Jewish Elementary and High School Education
- Israel Experiences (for the gap year after high school; perhaps during university or post-university years)
- University level Jewish studies

There are, of course, Jewish community centers, Jewish camps, and youth groups, but to provide the requisite Jewish skills, the essentials for future communal leaders, what is needed is intensive exposure to what makes us Jewish, keeps us Jewish, and is attractive about Judaism, which can be provided most effectively through the formal Jewish educational frameworks I outlined above. In terms of formal Jewish education, day schools are the only institutions that devote intensive time to the necessary Jewish studies, though supplementary schoolers who continue their studies through high school, and if also exposed to a wealth of informal Jewish educational experiences as well, may also develop the Jewish leadership attributes I described above.

How will the Jim Joseph Foundation go about choosing where to make its mark? Our experience dictates that much time - precious time - and money can be squandered in the early experimental phase. Philanthropic opportunities might look attractive at initial blush, but looking good is not necessarily the same as being philanthropically nourishing, nourishing to the recipient and nourishing to the donor organization. Good philanthropy demands a mutuality of benefit, nourishing for both the giver and receiver. The trustees and staff must be excited about, and motivated by a commitment to their mission. You must all see it as a higher calling, for your commitment and passion will determine the quality and effectiveness of your philanthropy.

A philanthropic foundation has inherent limitations, for unless it establishes institutions to implement its vision, it must rely upon “investing” in others. Over the years, I have followed both paths, but in the initial years of the Jim Joseph Foundation, I would recommend it consider investing its considerable resources in others and go about it as follows:

Leadership breeds leadership; children often follow the paths of their parents, and it may be possible to reduce your initial philanthropic risks

by developing a program to support the day school studies of academically outstanding children of Jewish communal professionals. These youngsters would be designated as Jim Joseph Merit Fellows when they enter high school, and they would be encouraged to network with one another across America. They would be exposed to Jewish communal and intellectual leaders at periodic retreats organized by the foundation. In addition, they will be expected, via a moderated list serve, to enhance their writing skills in order to maintain fruitful contact among themselves. It would be expected of the fellows that they not only attain excellent grades throughout their studies, but also display an active involvement in school and/or community affairs.

It would be for the foundation's trustees to determine what the annual tuition subvention would be (I suggest \$5,000 per annum), and who the catchment group of Jewish professional would include. I would strongly recommend that day school principals be foremost among that group along with professionals within the world of local Jewish federations.

The best of the Jim Joseph Merit Fellows would be encouraged and financially incentivized by the foundation to spend their gap year in Israel in one of the many new learning initiatives that have begun to flower as the result of *MASA*. I would further propose support for university studies if the Jim Joseph Merit Fellows see themselves on a career path towards communal service.

There is an additional benefit arising from a large nation-wide program of this nature, for it would send a reverberating signal to the American Jewish community that this large new foundation considers Jewish community leadership an ennobling profession and is prepared to concentrate a significant allocation of its philanthropy on easing a portion of its incumbents' financial burdens. If the new Jim Joseph Foundation seeks to develop Jewish leadership, it gets a "double bang for its buck" by indicating its admiration and respect for communal leaders whose families will be the beneficiaries of the proposed program.

In deciding upon the parameters of this program, one overriding principle must be held sacrosanct, and that is tuition assistance can only be provided for attendance at Jewish day schools and *MASA* programs that emphasize all of the elements considered necessary ingredients for developing potential Jewish leadership. For without all of them, a less reliable product is created.

My recommendation has a future as well; the Jim Joseph Foundation would follow the academic and professional career paths of all Jim Joseph

Merit Fellows and be prepared to entertain proposals from them once they are in the field. Not all the proposed initiatives need be funded, but if your initial investment in these Fellows proves to be the “deep value investment” I believe it can be, this future group could be a valuable source of philanthropic ideas in the field of Jewish education, which is the essence of your foundation’s vision and goals.

The pieces of this complicated puzzle will only emerge as a coherent picture as you gain the necessary experience and confidence to think in terms of philanthropic programs that enable you to speculate in an intellectual connection, as I assume Shimon Ben Joseph z”l would have wished.