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CONNECTED TO GIVE: JEWISH LEGACIES

PLANNED GIVING FINDINGS FROM THE NATIONAL STUDY OF AMERICAN JEWISH GIVING

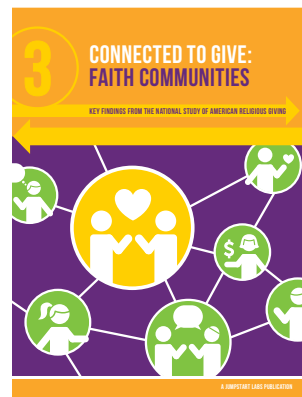
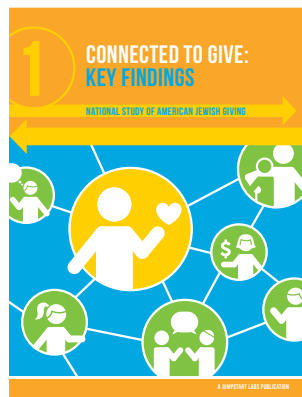


ABOUT CONNECTED TO GIVE

Connected to Give is a collaborative project of a consortium of independent foundations, family foundations, community foundations, and Jewish federations working in partnership with Jumpstart to map the landscape of charitable giving by American Jews. *Connected to Give: Jewish Legacies* is written by Jim Gerstein & J. Shawn Landres.

CONNECTED TO GIVE REPORT SERIES

Connected to Give: Jewish Legacies is the second in a series of reports based upon the wealth of data from National Study of American Jewish Giving. The first report, *Connected to Give: Key Findings*, was released on September 3, 2013. It represents the top level of information gleaned from the studies, but there is much more to be explored. In addition to findings that relate giving to demography and identity, there are additional data about specific populations, particular areas of interest, and individual modes of giving. This report is the first in a series of topic-specific investigations into the data. In the months to come we will be publishing a number of reports that go deeper on specific topics. Subsequent publications include reports on the multi-religious findings from the National Study of American Religious Giving (November 2013) and congregational giving (December 2013). Additional reports are planned for early 2014.



For updates, please make sure you are registered at connectedtogive.org so that you may be notified as new information becomes available.

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WHAT IS “PLANNED GIVING”?

This report, *Connected to Give: Jewish Legacies*, focuses on planned giving, which refers to charitable contributions pledged through provisions in wills or other estate planning documents. Our report examines four specific Jewish groups and the differences in their planned giving.

▶ Jews who have a charitable bequest in their will (“planned givers”)



▶ Jews who do not have a charitable bequest in their will (“non-bequestors”)

▶ Jews who have a charitable bequest in their will but not to a Jewish cause



▶ Jews who have a charitable bequest in their will to a Jewish cause

PREFACE

Many Jewish organizations do not have robust or sophisticated planned giving programs. Much of the emphasis in Jewish fundraising has traditionally been on securing cash gifts, which in turn, are spent on annual expenses. While critically important to the functioning of our communal system, these are not gifts that are designed to endure.

Planned giving is important to Jewish donors because it enables them to provide resources unavailable during their lifetime to the charities they cherish. Many donors leave a legacy by making a bequest to an endowment fund, a gift that keeps on giving in perpetuity and sustains the work of the causes they care about for future generations. And people who have made planned gifts continue to be generous current-year contributors.

Connected to Give: Jewish Legacies provides a detailed portrait of planned giving within the Jewish community. It invites Jewish organizations to embrace an opportunity for long-term financial stability by creating a serious focus on planned giving. And it challenges those organizations to use the data herein to shape their planned giving programs, and recognize the importance of Jewish connectedness as a way to achieve both their financial and communal goals. The data in this report demonstrate that the most engaged members of their communities very likely already have a will and are inclined to leave bequests.

Connected to Give: Jewish Legacies enables the Jewish philanthropic community to identify some of the people most likely to be interested in establishing a charitable legacy. For the first time, there is reliable data to help Jewish organizations and fundraisers understand Jewish planned givers and clear evidence that planned giving is a powerful way for donors to express their Jewish values and support the causes they love.

Planned gifts communicate the enduring values of donors' families and the Jewish tradition. In *Connected to Give: Jewish Legacies*, planned givers speak to us for the first time about why they have made a Jewish bequest: to live out the values instilled by their parents and grandparents—to continue a philanthropic family tradition—and to honor their commitment to being part of the Jewish community.

But planned giving isn't simply a way to recognize or memorialize the importance of families or loved ones from the past. Rather, planned giving is how we assure the vibrancy and relevance of the causes we care most about for the future. Making a planned gift, to any cause, for any purpose, is how we establish a legacy of being connected to give.

Marjory Kaplan, Lisa Farber Miller, and Arlene D. Schiff

San Diego, California; Denver, Colorado; and Agawam, Massachusetts

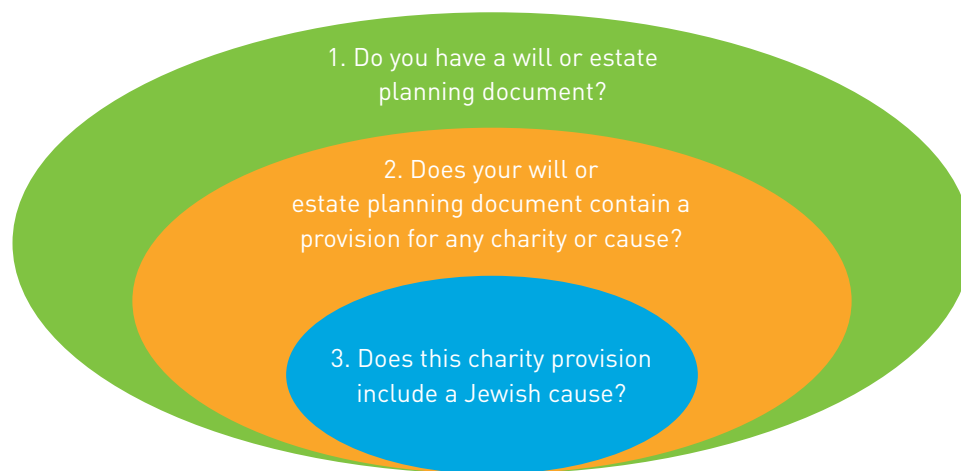
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INTRODUCTION

In *Connected to Give: Key Findings*, we provided an overview of the data from the National Study of American Jewish Giving. This report, *Connected to Give: Jewish Legacies*, focuses on planned giving, which refers to charitable contributions pledged through provisions in wills or other estate planning documents. Our report examines four specific Jewish groups and the differences in their planned giving:

- ▶ Jews who have a charitable bequest in their will (“planned givers”)
- ▶ Jews who do not have a charitable bequest in their will (“non-bequestors”) and
- ▶ Jews who have a charitable bequest in their will to a Jewish cause
- ▶ Jews who have a charitable bequest in their will but not to a Jewish cause

Connected to Give’s national surveys of American Jewish giving and of American religious giving (a parallel survey of non-Jewish Americans) ask three questions that form the basis for the analysis in this report:



Examining these three questions alongside the demographic and behavioral data in the dataset, clear findings emerge about those who have a charitable provision in their will and those who have bequests to Jewish organizations.

The planned giving questions were targeted to those individuals believed most likely to have made and/or be considering wills and planned gifts, specifically, people who are at least 40 years old and have household incomes of at least \$100,000 per year. All references to “American Jews” and “Americans” in this analysis reflect the responses of individuals within this particular age and income group.¹

THE MAJOR FINDINGS

Six major findings surface as critical takeaways for understanding planned giving habits among those American Jews who are considered most likely to have made charitable bequests:

1

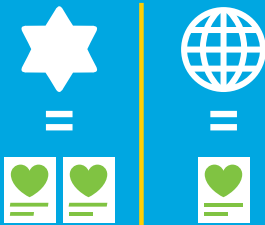


MAJOR FINDING 1

A large majority of Jewish respondents report having a will or estate planning document, but of those who do, only a third have made a charitable bequest.

While 74% report that they have a will, 32% of these individuals say that their will contains a provision for a charity (which translates into 23%, overall, who are planned givers).

2

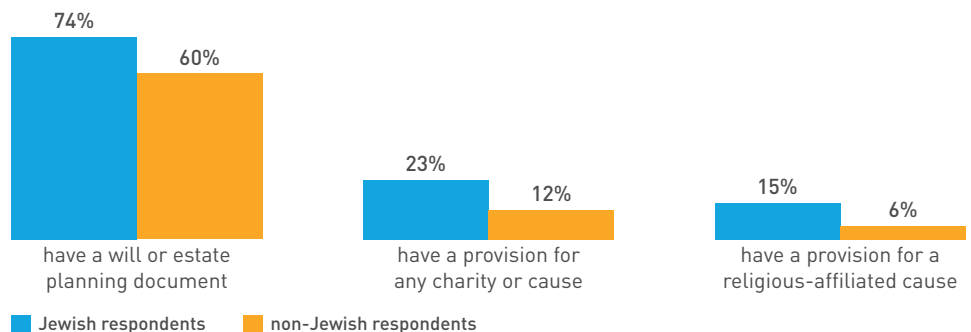


MAJOR FINDING 2

Jews are significantly more likely than other Americans to have a will, to have charitable provisions in their wills, and to have provisions for causes affiliated with their own religion.

On each planned giving question, Jewish respondents demonstrated a higher level of participation: 74% of Jews have a will, compared to 60% of non-Jewish respondents; 23% of Jews have a provision for a charity, compared to 12% of non-Jews; and 15% of Jews have a provision for a Jewish cause, compared to 6% of non-Jews who have a provision for an organization affiliated with their particular religious denomination.

Estate planning and planned giving among Jewish and non-Jewish respondents



MAJOR FINDING 3

Among Jews who have a charitable provision in their will or estate planning document, a large majority have a bequest to a Jewish cause.

66% of planned givers indicate that their will contains a provision for a Jewish cause.

3



MAJOR FINDING 4

As household income increases, the likelihood of being a planned giver increases—and the increased likelihood of leaving a bequest to a Jewish cause is even more pronounced.

The rise in planned giving is clear at different income breaks: 17% of Jews earning \$100,000-\$199,999 are planned givers; 31% of Jews earning \$200,000-\$299,999; and 39% of Jews earning \$300,000 and higher. Among planned givers, 53% in the \$100,000-\$199,999 bracket have bequests for Jewish causes; 71% in the \$200,000-\$299,999 bracket; and 85% in the \$300,000 and higher bracket.

4



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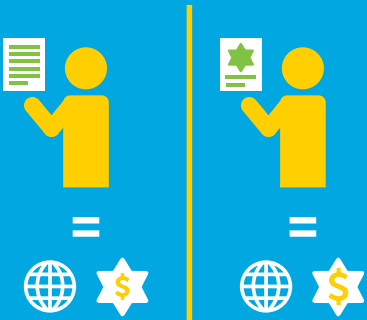


MAJOR FINDING 5

Similar to other results throughout the National Study of American Jewish Giving, connectedness to Jewish community is an important factor in planned giving behavior. Among planned givers reporting Jewish bequests, all (100%) have moderate to high levels of Jewish social engagement.

People with lower levels of Jewish engagement are far less likely to provide for any cause and none have made bequests to Jewish causes. Moreover, the more connected one is to Jewish institutions, the more likely she or he is to be a planned giver and have a Jewish bequest in his or her planned giving. Members of Jewish organizations are about twice as likely as Jewish respondents overall (45% to 23%) to be planned givers and nearly three times as likely (40% to 15%) to have a charitable provision for a Jewish cause. Similar patterns exist among synagogue members, those who more frequently attend formal religious services, volunteers, and visitors to Israel.

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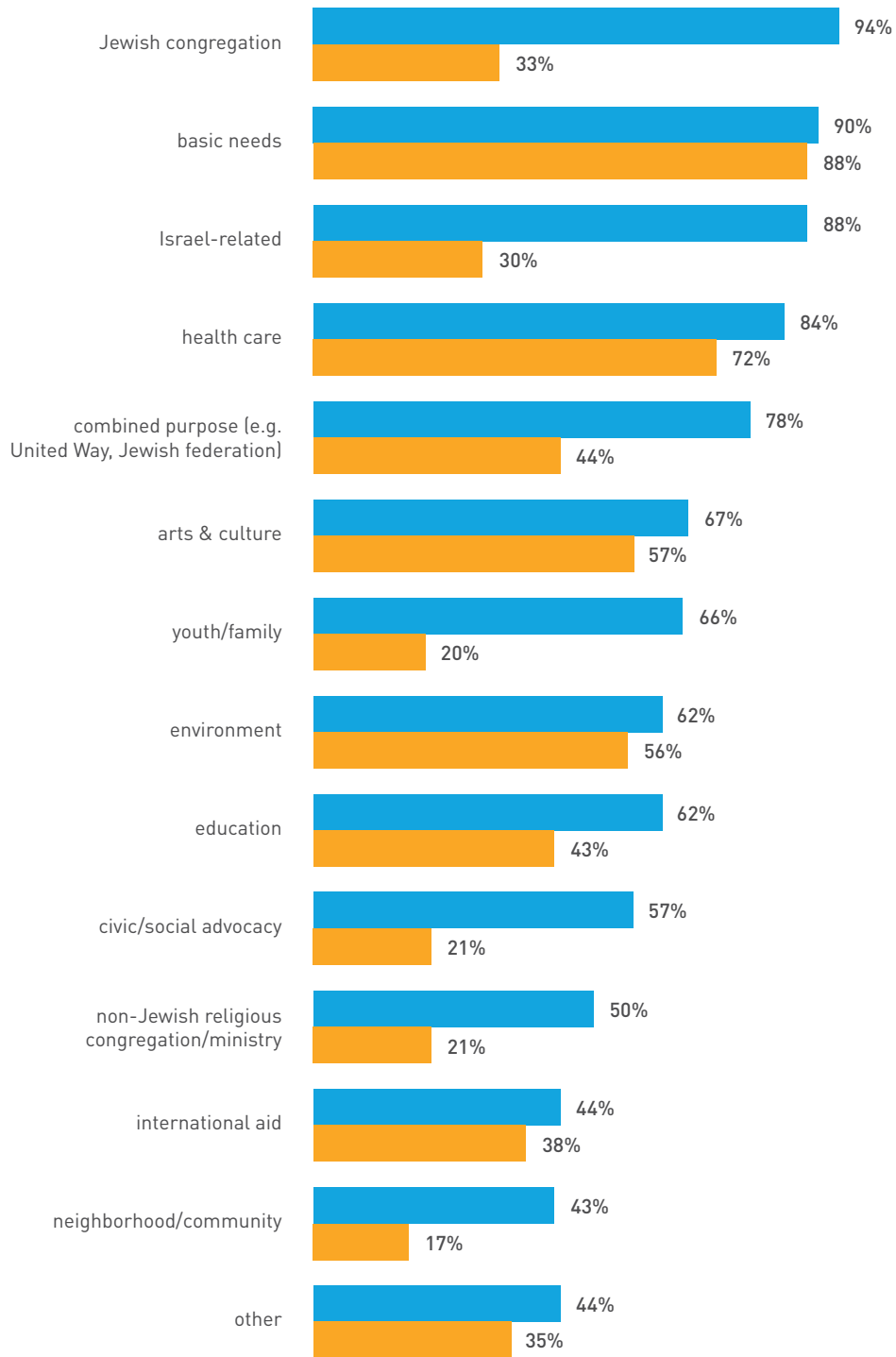


MAJOR FINDING 6

Planned givers—regardless of whether they do or do not have bequests to Jewish organizations—currently contribute to both Jewish and non-Jewish causes, but planned givers who do not have a Jewish organizational bequest give considerably less to Jewish organizations than planned givers who do have a Jewish bequest.

Whether it is contributing to Jewish federations (which received contributions from 21% of planned givers who do not have a Jewish bequest and 84% of planned givers who do have a Jewish bequest) or contributing to any Jewish organization (70% of planned givers who do not have a Jewish bequest and 99% of planned givers who do have a Jewish bequest), there are major differences in the current giving habits among planned givers who have a Jewish bequest and planned givers who do not have a Jewish bequest.

Current-year giving by Jewish planned givers (to all organizations)



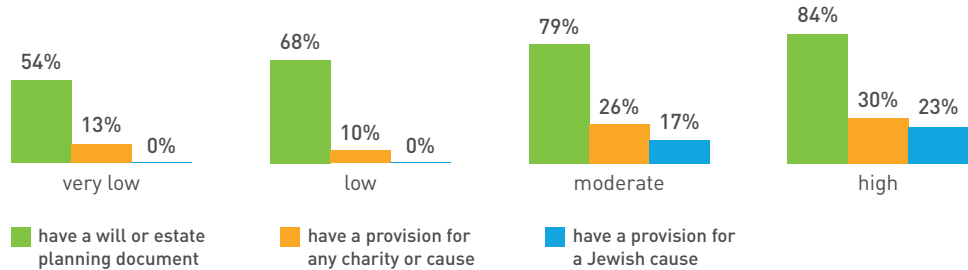
■ planned givers with Jewish bequest(s)
■ planned givers with no Jewish bequest

KEY DEMOGRAPHICS

Jewish Connectedness

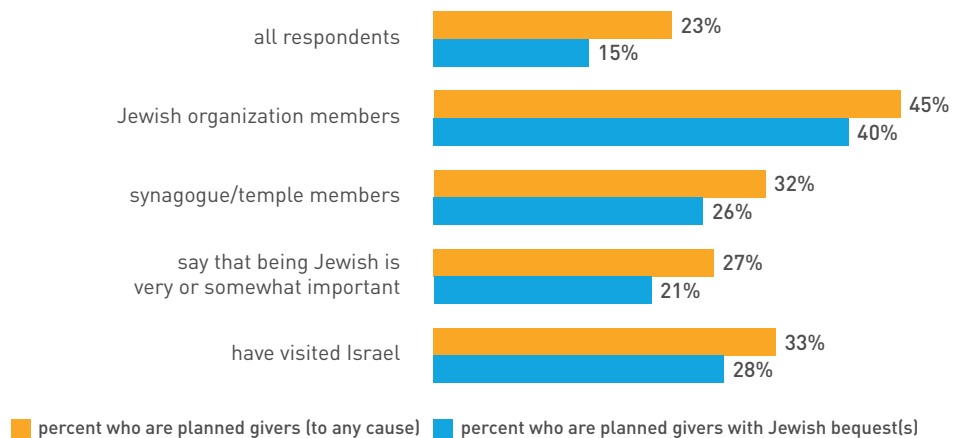
In the *Connected to Give: Key Findings* report, we emphasized the centrality of Jewish connectedness in the charitable behavior among American Jews. The strongest predictor of charitable giving among Jews is their level of engagement with and connection to the Jewish community. Jewish connectedness also is the most important factor in planned giving: the more connected an individual is to Jewish community, the more likely he or she is to be a planned giver and a planned giver to Jewish causes. The index of Jewish social engagement we used in *Connected to Give: Key Findings* yields similar results when it comes to planned giving among non-Orthodox Jews.²

Estate planning and planned giving, by level of Jewish social engagement



Measures of connectedness related to current giving, such as membership in a synagogue or a Jewish organization, also correlate with planned giving and Jewish bequests, as do the importance of being Jewish and having visited Israel. For example, members of Jewish organizations are about three times as likely as non-members (45% to 15%) to be planned givers to any charity or cause. Among planned givers, members of Jewish organizations are more than twice as likely as non-members (89% to 40%) to have made a Jewish bequest.

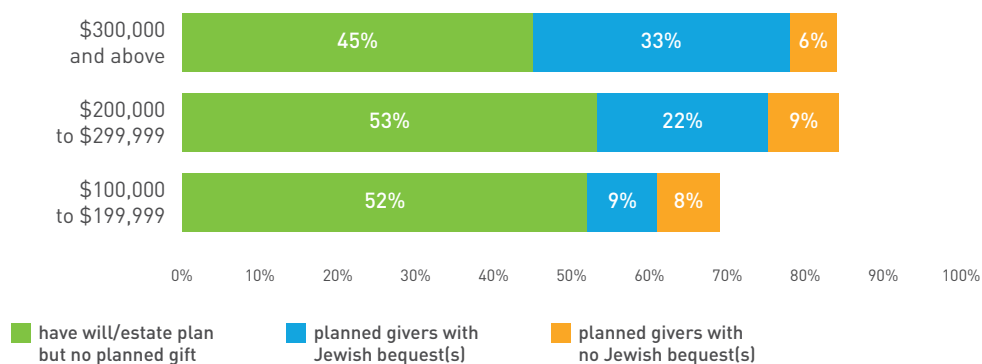
Planned giving and Jewish bequests by type of Jewish connection



Income

Another similarity between planned giving and overall Jewish charitable behavior is the relationship with annual household income: planned giving rises as income rises. First, among Jews who have a will or estate planning document, the incidence of having a charitable provision is notably higher in households earning more than \$300,000 (46%) than households making \$200,000-\$299,999 (37%) and \$100,000-\$199,999 (25%). Second, planned givers in the higher income brackets have a much higher incidence of leaving a bequest to a Jewish cause: 85% of planned givers who make over \$300,000 have a provision for a Jewish cause; 71% of planned givers making \$200,000-\$299,999; and 53% of planned givers making \$100,000-\$199,999.

Estate planning and planned giving by household income



Denomination and Religious Service Attendance

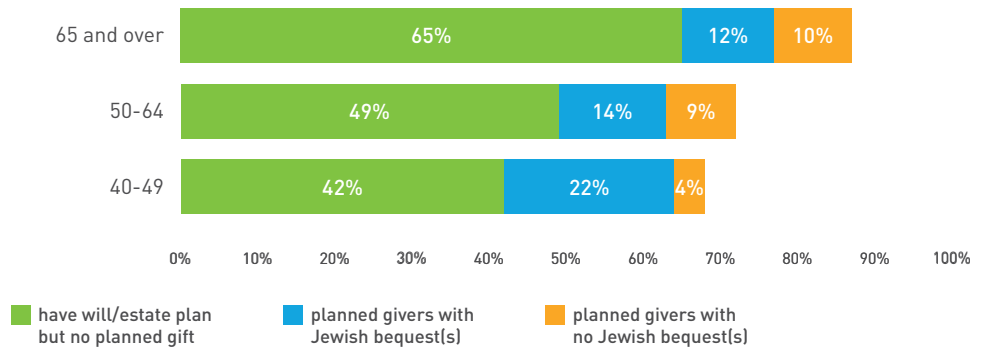
Orthodox Jews are significantly more engaged in planned giving and planned giving to Jewish causes than Conservative, and Reform Jews. Even though Orthodox Jews are less likely to have a will (71% of Orthodox Jews have a will), compared to Conservative Jews (81%) and Reform Jews (77%), they are considerably more likely to be planned givers (34% among the Orthodox, compared to 28% of Conservative and 19% of Reform Jews). When it comes to including a provision for a Jewish cause, 100% of Orthodox Jews who are planned givers have a Jewish bequest (compared to 75% of Conservative Jews, 38% of Reform Jews, and 38% of Jews who say they are “just Jewish”).

Frequency of formal religious service attendance reflects similar patterns. Jews who attend frequently are much more likely to have a will, be planned givers, and include a Jewish provision. In fact, 50% of Jews who attend services every week are planned givers, and 96% of them have a bequest for a Jewish cause. Among Jews who hardly ever or never attend services, 12% are planned givers and fewer than 1% have a provision for a Jewish cause.

Age

Jewish respondents in their forties are less likely to have a will than their older counterparts, but they are slightly more likely to be planned givers and much more likely to have a Jewish bequest. Among planned givers aged 65 and over, 55% also have a provision for a Jewish cause; this rises to 61% of planned givers aged 50-64 and 85% of planned givers aged 40-49. Some of this dynamic is related to income because Jews over 64 have lower incomes. However, the income differences between 40-49 year-olds and 50-64 year-olds are small while their planned giving behaviors are quite different.

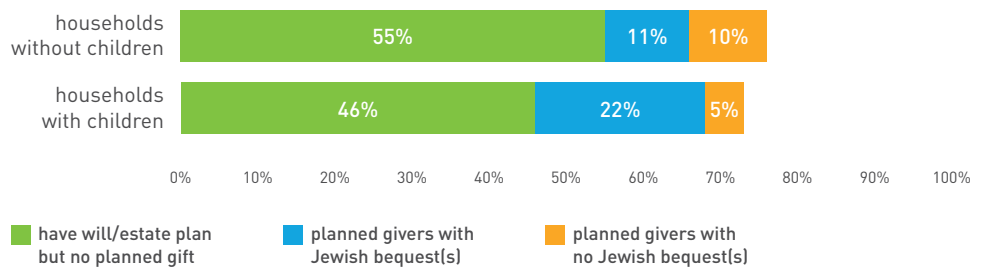
Estate planning and planned giving by age



Family Structure

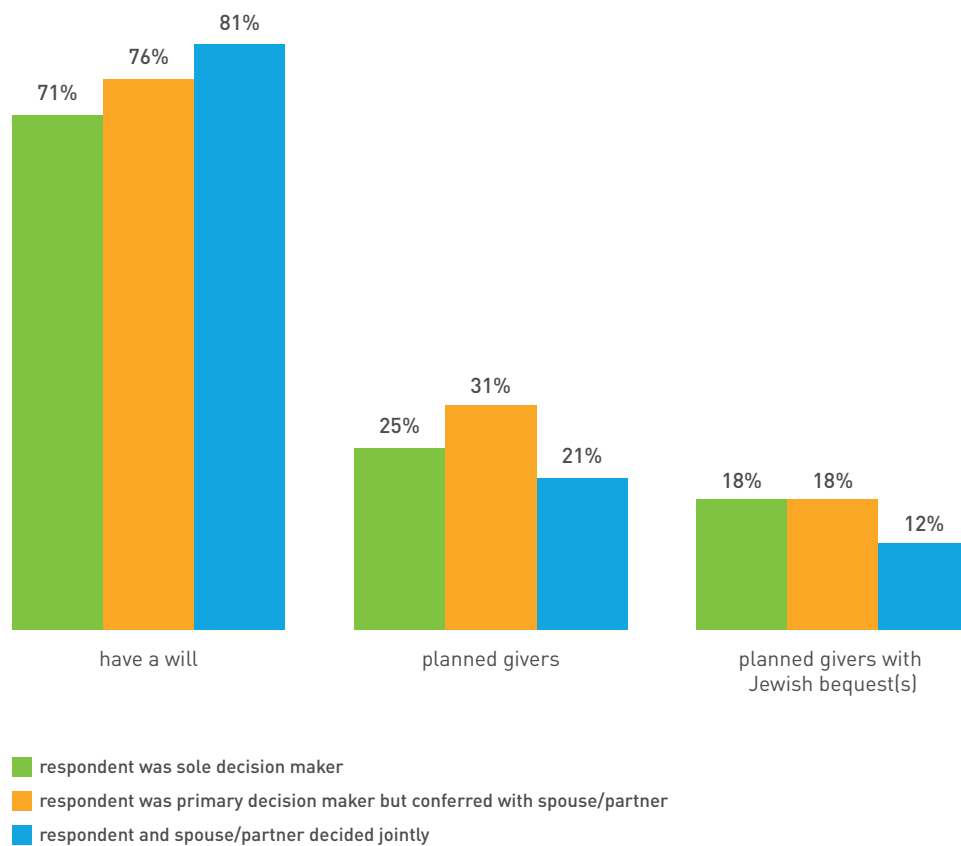
There is some evidence that family structures play a role in planned giving behavior, especially when comparing households with children and households without children. While there is virtually no difference between these households when it comes to whether someone has a will, there are notable differences when it comes to planned giving and bequests to Jewish causes. Households with children are a little more likely to be planned givers and much more likely to have a Jewish bequest (81% of planned givers) than households without children (52% of planned givers). This finding regarding the relationship between Jewish bequests and having children also ties into the impact of Jewish connectedness. As we highlighted in *Connected to Give: Key Findings*, households with children are more connected to Jewish community than households without children.³

Estate planning and planned giving among households with and without children



Another family dynamic influencing planned giving centers on who makes major giving decisions. To address this point, we asked married and partnered respondents about how they made the decision regarding their household's largest 2012 charitable gift. Among families where it is a joint decision, more people have a will (81%) compared to families where the respondent claims primary responsibility (76%) or sole responsibility (71%). But the pattern changes when looking at planned giving and bequests to Jewish causes, and households with joint decision making become the least likely to have a charity in their will and the least likely to have a bequest to a Jewish cause.

Estate planning and planned giving by charitable gift decision-making process



Gender

Large majorities of both men (73%) and women (76%) have wills. However, this relationship does not hold when considering planned givers and Jewish bequests, as more men (27%) have a charitable provision than women (19%). Among planned givers, men are twice as likely as women to have a Jewish bequest (20% of men, 10% of women).

Political Party Identification

There is virtually no difference between Jewish Democrats and Republicans when it comes to planned giving behavior, but there is a notable difference among Independents. While 26% of Republicans and 24% of Democrats are planned givers, 14% of Independents are planned givers. Among planned givers, 71% of Democrats have a Jewish bequest, compared to 65% of Republicans and 33% of Independents.

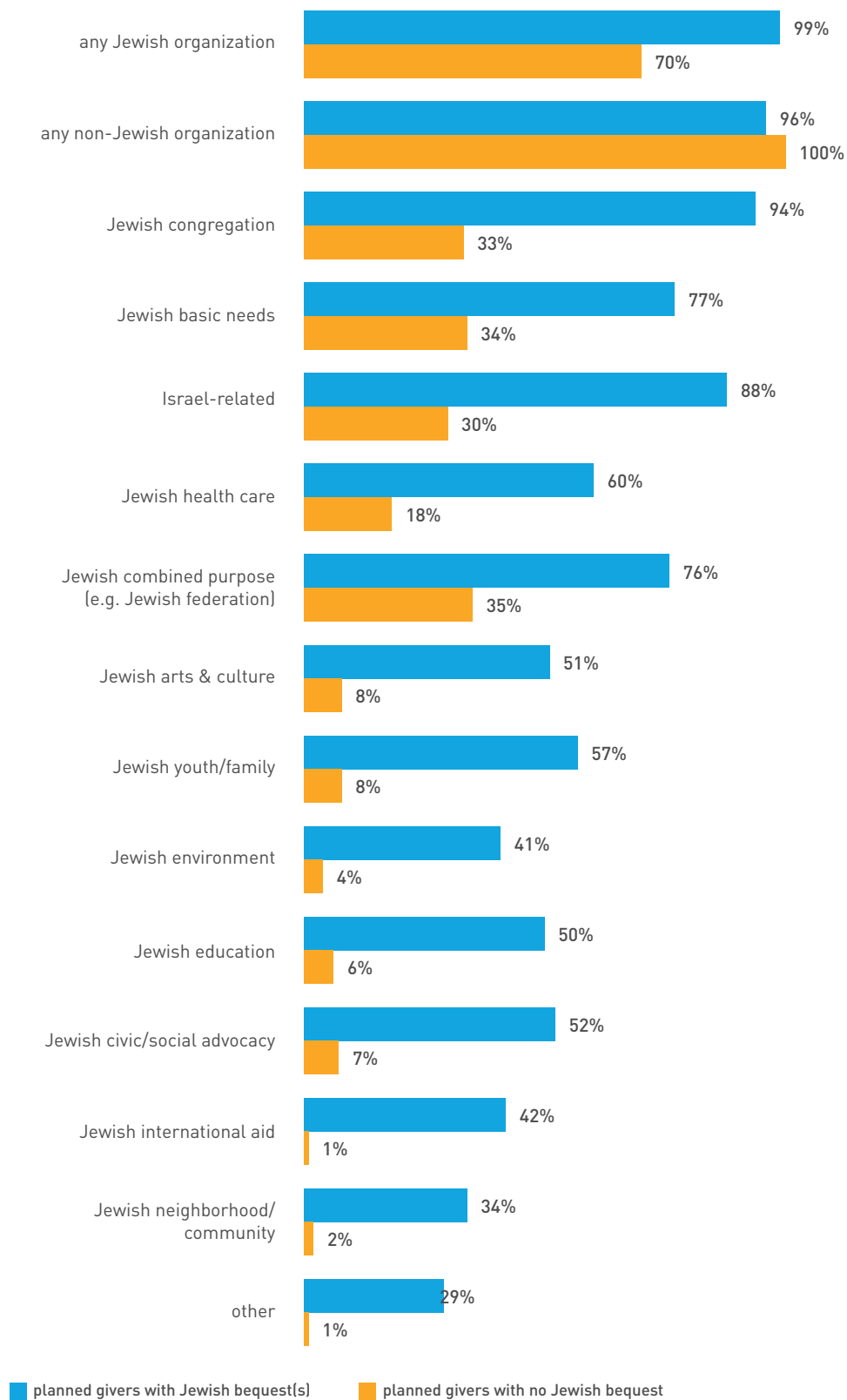
PLANNED GIVING TO JEWISH AND NON-JEWISH CAUSES

Within our sample (American Jews over 40 years old with household incomes above \$100,000), 23% already have made a planned gift. Within that group, 66% already have a bequest to a Jewish cause in their will. In order to identify what distinguishes among planned givers in general, those with bequests to Jewish causes, and those without bequests to Jewish causes, our analysis examines one behavioral aspect (current giving patterns) and one attitudinal aspect (donors' stated motivations to give).

Current-year charitable contributions by planned givers

Measures of connectedness related to current giving, such as membership in a synagogue or a Jewish organization, also correlate with planned giving and Jewish bequests, as do the importance of being Jewish and having visited Israel. For example, members of Jewish organizations are about twice as likely as other Jewish respondents to be planned givers (to any cause)—but they are nearly three times as likely to have a Jewish bequest.

Current-year giving by Jewish planned givers (to Jewish organizations)



The differences in current-year giving to Jewish organizations reflect a dynamic that runs throughout the data. Planned givers whose wills have provisions for Jewish causes donate to Jewish organizations in much greater numbers than planned givers whose wills do not have provisions for Jewish causes. This is particularly evident when looking at giving patterns to single-purpose organizations. For example, 90% of planned givers with a Jewish bequest also report having made a current-year gift to basic needs organizations, compared to 88% of planned givers who do not have a Jewish bequest. However, this 2-point difference explodes to a 43-point difference (77% among planned givers with a Jewish bequest; 34% among planned givers without a Jewish bequest) when it comes to giving to a Jewish basic needs organization. Put another way, Jewish planned givers *with* a Jewish bequest are much more likely to give to Jewish organizations; on the other hand, Jewish planned givers *without* a Jewish bequest are much more likely to give to non-Jewish organizations.

Incidence of charitable giving among planned givers

	planned givers with Jewish bequest	planned givers without a Jewish bequest	difference between those with and without a Jewish bequest
Jewish basic needs organization	77%	34%	+43
any basic needs organization	90%	88%	+2
Jewish health care organization	60%	18%	+42
any health care organization	84%	72%	+12
Jewish environmental organization	41%	4%	+37
any environmental organization	62%	56%	+6
Jewish international aid organization	42%	1%	+41
any international aid organization	44%	38%	+6

It is also noteworthy that this dynamic does not hold in the case of Jewish federations and other organizations that serve a combination of purposes (e.g., the United Way, Catholic Charities, etc., which aggregate contributions and then allocate them to a variety of different causes). That is, the incidence of combined-purpose giving among planned givers with a Jewish bequest is much greater than it is among planned givers without a Jewish bequest, even if the organization is not a Jewish organization.

Incidence of charitable giving among planned givers

	planned givers with Jewish bequest	planned givers without a Jewish bequest	difference between those with and without a Jewish bequest
Jewish federation	84%	21%	+63
Jewish combined purpose organization	76%	35%	+41
any combined purpose organization	78%	44%	+34

Giving Motivations for Planned Givers

Looking at the motivations that people give for making a charitable contribution, we see more evidence for linkage between Jewish-specific and family-related motivations and Jewish bequests on the one hand, and linkage between generally altruistic motivations and planned giving without Jewish bequests, on the other hand. Notably, the top two motivators for those with Jewish bequests center on Jewish and family motivations: “a commitment to being Jewish” (84% cite this as an extremely or very important motivator) and “a desire to live up to values instilled in me by my parents or grandparents” (83% extremely or very important motivation). The top two motivators among planned givers without a Jewish bequest center on helping others: “the feeling that I am fortunate and want to give back to society” (68% extremely or very important motivation) and “a desire to meet critical needs in the community and support worthwhile causes” (64% extremely or very important motivation).

Again, as we saw in the data on where planned givers direct their contributions, the differences in motivation are even sharper between planned givers with a Jewish bequest and planned givers without a Jewish bequest. In this case, there are larger gaps on all Jewish-specific and family-related motivations and much smaller gaps on universal motivations.

Motivations for giving among Jewish planned givers

	planned givers with Jewish bequest stating "extremely" or "very important"	planned givers without a Jewish bequest stating "extremely" or "very important"	difference between those with and without a Jewish bequest
commitment to being Jewish	84%	14%	+70
improve Jewish life and community	74%	14%	+60
live up to parents' and grandparents' values	83%	42%	+41
set example for children, future generations, community, or social network	75%	43%	+32
those with more should help those with less	75%	59%	+16
I'm fortunate and want to give back to society	76%	68%	+8
meet critical needs and support worthwhile causes	66%	64%	+2

CONCLUSION

American Jews are a very good audience for those who seek to promote planned giving. Not only do Jews exhibit high levels of charitable giving—as we have seen in *Connected to Give: Key Findings*—but many Jews, especially those 40 and older with higher household incomes, also have a will or estate planning document. Three findings on planned giving stand out as having particularly relevant implications for planning and fundraising professionals.

First, Jewish planned givers in their forties are less likely to have a will than people 50 years and older, but they are slightly more likely to be planned givers and much more likely to have a bequest to a Jewish cause. This finding suggests that educating 40-49 year-olds about estate planning will lead to an increase in charitable bequests, especially to Jewish causes. Given the importance of connectedness, planned givers may be more likely to make charitable bequests to organizations where they already are involved.

The second implication centers on the fact while only one quarter of Jewish respondents have made a planned gift, but among those who have, nearly two thirds have made a bequest to a Jewish cause. The data clearly show that if more moderately and highly engaged American Jews included charitable bequests in their wills, many of these gifts likely would flow to Jewish causes.

Finally, we return to the connectedness finding established in *Connected to Give: Key Findings*. The more connected an individual is to Jewish community, the more likely this individual will be a planned giver and a planned giver to Jewish causes. The strong Jewish and family commitments of planned givers with Jewish bequests—not only to *being* Jewish but also to *living* their family's values—only reinforces the importance of strong Jewish social networks in charitable giving.

ENDNOTES

¹ For a full explanation of the study's methods, see "Methods" in *Connected to Give: Key Findings* (pp. 23-24) or online at connectedtogive.org for more details. The sample sizes for the Jewish data cited in *Connected to Give: Jewish Legacies* are: 602 total respondents; 427 respondents who have a will; 118 planned givers; 291 non-bequestors; 70 planned givers with a Jewish bequest; 44 planned givers without a Jewish bequest. The sample sizes for the non-Jewish data cited in this report are: 414 total respondents, 253 respondents who have a will; 49 planned givers; 200 non-bequestors; and 25 planned givers with a bequest to their particular religious denomination. Given the extremely small number of planned givers in the non-Jewish data, we do not analyze these respondents beyond a one-time comparison to the Jewish respondents to provide context for the Jewish results.

² Among the American Jews surveyed for this report—respondents aged 40 years old or older who have household incomes of \$100,000 or more—those who are non-Orthodox have higher levels of Jewish social engagement than do their peers by age or income (except only those with a household income of \$250,000 or more). Our index of Jewish social engagement is built from four components that are both empirically related to one another and related to the likelihood of donating to Jewish causes. They are: 1) family status (in-married, non-married, and intermarried); 2) proportion of close friends who are Jewish (four levels from few or none to all or almost all); 3) attendance at Jewish religious services (four levels from never to every week); and 4) whether one volunteers for a charitable or religious organization. See "Measuring Jewish Connectedness" in *Connected to Give: Key Findings* (p. 6) or online at connectedtogive.org for more details.

³ Our analysis does not address marital status because of the small sample size of unmarried Jews in our over 40/over \$100,000 year sample. Similarly, we do not address education because of the small sample of non-college educated respondents in this sample of older, higher income Jews.

AFTERWORD

This report is a call to action to integrate planned giving into the core of the Jewish community's philanthropic culture—not as an afterthought, but as a critical element of ensuring a future. Most American Jews have a will or estate plan, but few are planned givers. There is enormous potential to educate donors about the power of legacy gifts by engaging them and deepening their connection to the Jewish community, and ultimately, encouraging them to add a planned gift to their will.

Connected to Give: Jewish Legacies answers the questions: how do we know which donors are most likely to make planned gifts to the causes they care about? How can we maximize the opportunity presented by planned giving to strengthen community institutions for the future? The answer is to seek people who are active participants in programs or services. Find the most loyal supporters who are most connected to a cause's mission and purpose, regardless of their wealth. This includes existing annual donors who have given consistently over a long period of time, no matter the amount. Organizations that sustain deep, life-long connections with their members are especially likely to attract planned gifts. Those who work in planned giving have experienced the power of helping donors to create a legacy.

From *Connected to Give: Key Findings*, we know that the more connected people are, the more they will give. Jewish organizations need to support each other in planned giving efforts: their supporters will greatly appreciate the spirit of collaboration. This is not a competition for donors, in our experience, because most planned givers provide for multiple organizations—both Jewish and non-Jewish—in their estate plans. Moreover, across all causes, people with wills and planned gifts are even more generous current donors than their peers without them. When every organization is having legacy conversations, and these conversations are integrated with other philanthropic requests, more donors will make planned gifts, including to Jewish causes, and the entire Jewish community will benefit.

A word of caution: planned gifts are enduring, but in many cases they are also revocable during the lifetime of the donor. As the first report in the *Connected to Give* series documents, even the most committed Jewish donors expect transparency and seek evidence of impact. Planned givers see themselves as investors and partners and expect a high level of stewardship. Even after a legacy gift is secured, successful stewards continue to engage with donors by communicating with them often, regularly acknowledging the gift, and—most importantly—remaining committed to keeping their donors *connected to give*.

MK, LFM, & ADS

CONNECTED TO GIVE CONSORTIUM

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Steering Committee: Jeffrey R. Solomon (chair), Adina Dubin Barkinskiy, Michael Bohnen, Sanford R. Cardin, Seth Cohen, Kate Conn, Danielle Foreman, Jennifer Gorovitz, Rabbi Irving Greenberg, Lee Meyerhoff Hendler, Felicia Herman, Jay Kaiman, Scott Kaufman, Morlie Levin, Adin Miller, Alicia Schuyler Oberman, Marcella Kanfer Rolnick, Rafi Rone, Simone Friedman Rones, Charlene Seidle, Andrés Spokoiny, Dara Weinerman Steinberg, Douglas Bitonti Stewart, Shawn Landres (ex officio).

Research Advisory Committee: Joshua Avedon, Felicia Herman, Lisa Farber Miller, and Dara Weinerman Steinberg; Professor Shaul Kelner, Vanderbilt University, independently reviewed the research design.

Planned Giving Advisory Committee: Lisa Farber Miller (chair), Michael Bohnen, Marjory Kaplan, Arlene D. Schiff, Charlene Seidle.

Research Team:

- ▶ Shawn Landres, Jumpstart (chair)
- ▶ GBA Strategies: Jim Gerstein (principal investigator), Michael Bocian, and Eliana Fishman
- ▶ Indiana University Lilly Family School of Philanthropy: Professors Una Osili (principal investigator), Mark Ottoni-Wilhelm, and Debra Mesch
- ▶ Professor Steven M. Cohen, Hebrew Union College-Jewish Institute of Religion and the Berman Jewish Policy Archive
- ▶ Professor Sarah Bunin Benor, Hebrew Union College-Jewish Institute of Religion
- ▶ Professor Evelyn Dean-Olmsted, Universidad de Puerto Rico, Rio Piedras
- ▶ Professor Ayala Fader, Fordham University
- ▶ Kari Dunn Saratovsky, KDS Strategies
- ▶ Sian Winship, Hershey Cause Communications

Communication Team:

- ▶ Joshua Avedon, Jumpstart (chair)
- ▶ Hershey Cause Communications
- ▶ Advisory Committee: Adin Miller, Marcella Kanfer Rolnick, Kari Dunn Saratovsky, Roben Kantor Smolar, Douglas Bitonti Stewart

ABOUT JUMPSTART

Jumpstart is a philanthropic research & design lab based in Los Angeles. Jumpstart's unique combination of research, convenings, and funding enables creative changemakers—philanthropists and institutional leaders alike—to realize their own visions and advance the common good. Funders turn to Jumpstart for analysis and forecasting based on original research reports such as *The Innovation Ecosystem* (2009), *Haskalah 2.0* (2010), *The 2010 Survey of New Jewish Initiatives in Europe: Key Findings* (2010), *The Jewish Innovation Economy* (2011), and the *Connected to Give* report series (2013). For funders seeking to achieve collective impact, Jumpstart designs and facilitates highly collaborative summits that connect, inform, and empower leaders with the capacity to create meaningful change in their communities. Through fiscal sponsorship and other funding vehicles, Jumpstart delivers resources to new initiatives that are reshaping community life around the world. For more information, please visit jumpstartlabs.org or email connect@jumpstartlabs.org.

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Connected to Give series editors: Joshua Avedon and J. Shawn Landres

Information Design: Joshua Avedon



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