

The Jewish Foundation of Cincinnati

Strategic Planning Process 2010-11

Final Report

April 15, 2011

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Executive Summary

This report serves as formal documentation of the strategic planning process facilitated by Rosov Consulting, LLC from September 2010 to February 2011.

Background

The Jewish Foundation was established in 1995, with an endowment of approximately \$70 million. The Foundation's Mission Statement reads as follows:

The Jewish Foundation of Cincinnati recognizes its special relationship to the Jewish community and its institutions. As provided in its Articles of Incorporation, the Foundation will support, promote, advance and strengthen the Jewish community and Jewish causes in Greater Cincinnati and throughout the world which the Foundation's Board of Trustees deems appropriate to support.

The Jewish Foundation of Cincinnati may also support, promote, advance and strengthen The Jewish Health System, Inc. and The Jewish Hospital of Cincinnati, Inc. and any other entity operating a health care provider as part of a health care delivery system which includes The Jewish Health System, Inc. and The Jewish Hospital of Cincinnati, Inc.

For the subsequent 15 years, the Foundation's Board of Trustees made grants totaling approximately \$3.5 million annually, contributing to the needs (with particular focus on capital needs) of the Cincinnati Jewish community.

In 2010, Mercy Health Partners purchased the Jewish Hospital generating a new asset base expected to grow to between \$275 and \$300 million. The Board of Trustees engaged Rosov Consulting to provide perspective, information and guidance and to facilitate the process of planning for its new community role.

Overview of Process

The strategic planning process consisted of three distinct, but overlapping, components: (1) “**Discovery**,” whereby the consultants reviewed, collected and presented information intended to impact Foundation decision-making; (2) **Trustee planning and development**, consisting of an intensive two-day retreat followed by three facilitated planning meetings, supported by numerous preparatory and summary documents; and (3) **Philanthropic advising**, involving one-to-one consulting between Rosov Consulting and trustees/staff complemented by additional research on issues of interest.

Specific “inputs” of the strategic planning process included:

- (1) A review of Foundation grantmaking from 1995 – 2010;
- (2) Expert presentations on major issues and trends in the North American Jewish community, with focus on patterns in Israel engagement, innovative efforts to engage young adults, and the latest thinking in “cradle-to-grave” Jewish education;
- (3) The results of interviews with 58 community members (including all 11 trustees) yielding an array of viewpoints on the possibilities and perceived challenges for the Cincinnati Jewish community;
- (4) An overview of philanthropic models and approaches available to the Foundation

Results: Principles, Goals and Strategies

Vested with new information and aided by facilitated retreat and planning meetings, the trustees created a unified set of principles intended to undergird the Foundation's work; five specific and

distinct grantmaking goals; and a set of strategies that support those goals. This work constitutes the direction and focus of the Foundation moving into the exciting early stages of its enhanced philanthropic capacity.

The Foundation generated the following as its new vision, guiding principles and goals:

The Foundation's Vision: **"A Vibrant Cincinnati Jewish Community."**

The Foundation's Guiding Principles: **Excellence, Accessibility, Sustainability, Adaptability, Data-Driven.**

The Foundation's Goals: **(1) Basic Needs; (2) Jewish Educational Opportunities; (3) Leadership Development; (4) Continuity of Jewish Involvement; and (5) Israel Connection.**

Relationship with the Federation and Other Cincinnati Jewish Communal Organizations

There is a high degree of convergence between the Foundation's new priorities and the hopes and visions expressed by those in congregations, agencies, schools and many other Cincinnati Jewish community organizations during the consultancy's research phase. Early drafts of the Jewish Federation of Cincinnati 2020 plan also reveal striking synergies and similar ideals. Consequently, the Foundation will be eagerly waiting the Federation's final set of priorities and plan of action in order to begin thinking about joint and parallel endeavors. The stage is certainly set to unify community efforts around some very big shared goals.

Approaches to Grantmaking

The trustees and staff of the Foundation displayed a hunger for learning about the wide array of progressive approaches being practiced in philanthropy today. Throughout the strategic planning process, Foundation leaders explored and debated the merits of different philanthropic approaches and programming options in the context of their strategic conversations. Consequently, the Foundation is now ready to learn more about and ultimately adopt a novel blend of philanthropic "personae" and, among other things, to partner, convene, undertake additional research and develop model programs. By engaging with the community in this way, the Foundation will position itself as a creative, forward-thinking leader and partner.

Increased Capacity Requirements

The Foundation's trustees also gained clarity and cohesion around the significantly expanded requirements and responsibilities inherent in the new kind of philanthropic entity the Foundation will soon become. Rosov Consulting provided initial guidelines and benchmarking data on reasonable ratios for administrative expenses and staffing levels to sustain the Foundation's new vision and expanded grantmaking.

The Way Forward

With vision, clear direction and focus established the groundwork has been laid for the Foundation to begin its transition from a \$3-4M per year traditional grantmaking entity, to a \$12.5-15M (and possibly more) per year strategic philanthropy. This transition constitutes tectonic and paradigmatic shifts and will require a full implementation plan for how to bring the strategic plan "to life." The Foundation will need to make significant strides in the next 18-36 months, and garner early success in the initial stages of execution. This is truly an exciting moment in the rich and venerable history of the Jewish community of Cincinnati and the Foundation is primed to make a significant impact.

I. Project Overview

Founded in 1995, the Jewish Foundation of Cincinnati initially vested with nearly \$70 million in assets from the transition of the Jewish Hospital into the Health Alliance of Greater Cincinnati. In March of 2010, the hospital was sold outright for approximately \$250 million and once fully vested, the Foundation will be positioned to embark upon an annual grant making portfolio exceeding \$12 million – roughly three times that of the local Federation. The sale of the Jewish Hospital, along with the resulting drastic increase in the Foundation’s asset base, provided an historic opportunity for the Foundation to explore playing an active and significant role as a enhancing the quality of Jewish life in Cincinnati.

For this foundation with a fifteen-year track record, the transition to increased grantmaking calls for integration of past strategies with new approaches. In particular, the Foundation required a set of strategic priorities to focus and guide its grantmaking decisions in this new era as well as an infrastructure plan to support them for the long term.

During July and August 2010 the Foundation fielded an RFP and reviewed proposals for a strategic planning consultancy. In September the Foundation engaged Rosov Consulting, LLC, of Berkeley, CA to facilitate the planning process. Over the course of the next six months, through February 2011, Rosov Consulting’s team worked closely with Foundation professionals and trustees to execute an ambitious planning process.

The consultancy and concomitant planning process was designed around three core objectives comprising six primary areas of activities as follows:

Learning

- I. Providing pertinent intelligence on key issues and trends in the contemporary Jewish communal landscape to support Foundation decisions.
- II. Highlighting practices in philanthropy worth emulating and analyzing their potential relevance to the Foundation’s work.

Deliberating and Deciding

- III. Identifying and articulating Foundation directions and general areas of focus.
- IV. Assistance in identifying necessary infrastructure for initial implementation period.

Beginning to Implement

- V. Guiding the Foundation in the development of an optimized Foundation – Federation long-term relationship.
- VI. Supporting the Foundation in managing its communications during the strategic planning process as well as sharing results with the broader community.

Figure 1 below shows an overview of the entire strategic planning consultancy.

JEWISH FOUNDATION OF CINCINNATI
 ROSOV CONSULTING - STRATEGIC PLANNING CONSULTANCY

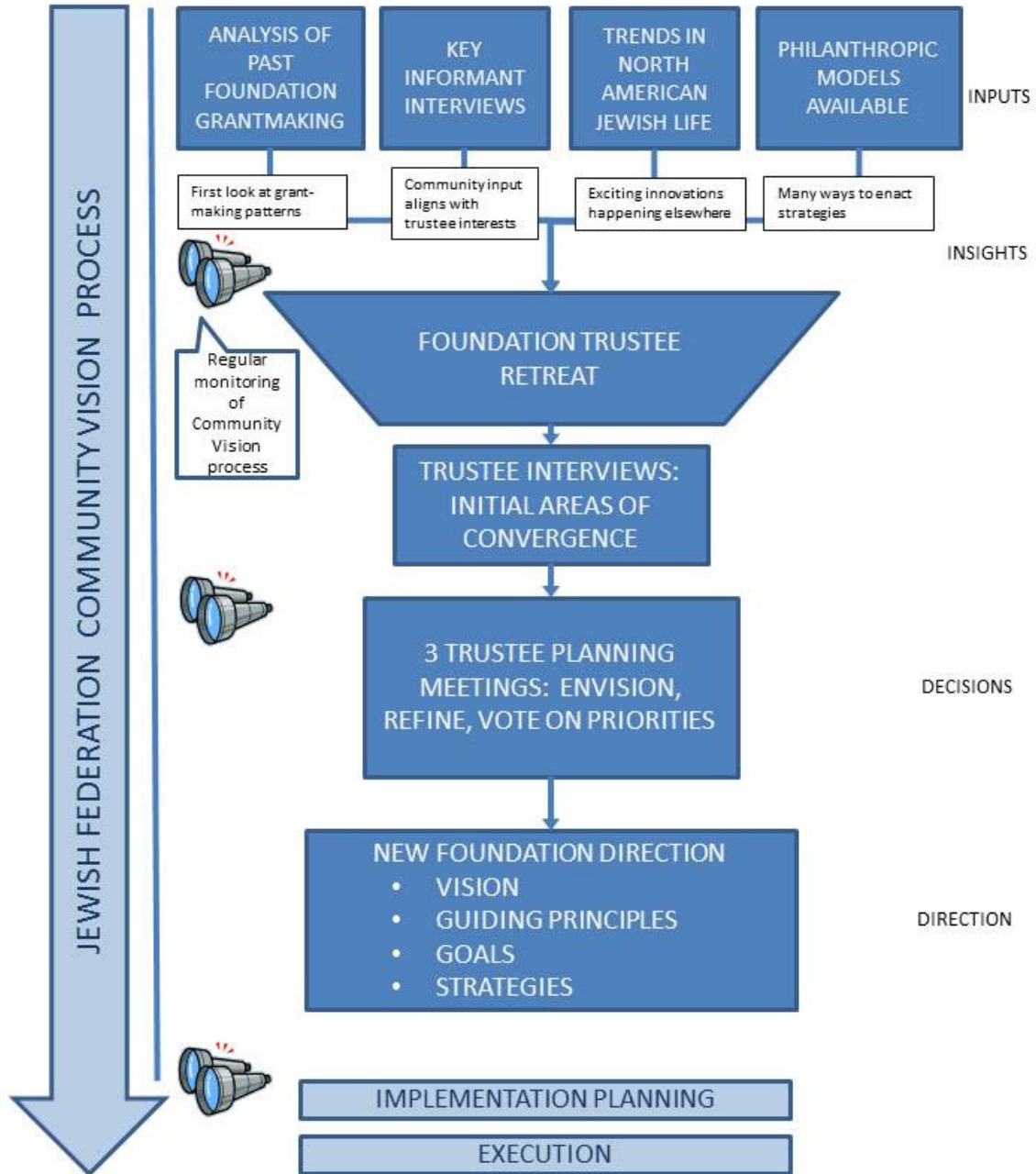


Figure 1: Overview of the Strategic Planning Consultancy

II. New Foundation Direction and Priorities

Facing an entirely new level of giving, the Foundation's Board of Trustees recognized a need to re-evaluate all aspects of Foundation functioning, including staffing, goals, guidelines, grantmaking approaches and community relations. Over the course of a two-day retreat and three subsequent planning meetings designed and facilitated by Rosov Consulting, the trustees reached agreement on core priorities for the Foundation. Trustees established an ambitious vision; adopted five guiding principles; and ratified and prioritized five goals, each with several associated strategies.

The Foundation's Vision

The Foundation's hopes and dreams for the future of Jewish Cincinnati and for how the Foundation itself is viewed by others are encapsulated in its new vision statement. Trustees were careful to fuse the information obtained about community stakeholders' visions and perceptions with their individual and collective opinions. The resulting vision will serve as an important standard against which the Foundation will measure all of its activities going forward; it will also provide the Cincinnati Jewish community and the community-at-large with an understanding of what the Foundation seeks to achieve. It is critical to note that Foundation trustees understand that only in partnership with a broad array of communal institutions and individuals will this ambitious and exciting vision be realized.

The Foundation's Vision of the Future: "A Vibrant Cincinnati Jewish Community"

- The Cincinnati Jewish Community is growing, vibrant, and caring.
- Cincinnati is a Jewish destination: Jews move to Cincinnati, stay in Cincinnati, and invest in Cincinnati.
- Being Jewish in Cincinnati is attractive, affordable, enjoyable, and meaningful.

We are Proud to Say That...

- Our Jewish Community is inclusive and welcoming.
- Local Jewish organizations and programs are flourishing.
- New, innovative, and diverse opportunities for participating in Jewish life are sprouting.
- Congregational life is thriving.

The Foundation is Known For...

- Building and enhancing Jewish identity and pride through excellent Jewish educational opportunities, including Jewish camping and connections with Israel.
- Attracting and developing volunteer and professional Jewish communal leaders.
- Building bridges with the larger Cincinnati community.
- Increasing participation in and removing barriers to participation in Jewish life/community.
- Integrating rich local tradition with emerging ideas and trends.
- Being staffed and resourced to function as a "high impact" philanthropy.

The Foundation's Guiding Principles

At the heart of trustees' deliberations were a series of deeply-held values or Guiding Principles that animated and influenced their thinking, interactions and ultimately their decisions. The trustees decided to adopt this set of guiding principles as a concrete embodiment of their commitment to a set of standards that will inform all the Foundation does from this point forward. All five principles selected reflect values of the trustees as individuals and a collective and will be used as critical filters in designing, implementing, and evaluating goals, strategies and tactics. The Foundation's guiding principles will be the following:

Excellence – Striving for and achieving excellence in everything in which we are involved paves the path to our vision.

Accessibility – Easing access to and affordability of programs and services promotes Jewish involvement for community members of all ages and abilities.

Sustainability – Our plans must be envisioned and enacted to ensure a vibrant Cincinnati Jewish community for generations to come.

Adaptability – Programs and services must adapt to changing circumstances and lessons learned from our successes and failures.

Data-Driven – Being data-driven ensures informed strategy development, tactical decision-making, and accountability.

The Foundation’s Goals, Strategies and Philanthropic Roles

Following the articulation of a bold vision for the future of the Jewish community of Cincinnati and the values or guiding principles that the trustees seek to embody in working to realize this vision, the core of the trustees planning work comprised the articulation, prioritization, and ratification of a set of goals and strategies that will constitute the Foundation’s direction and focus in the coming years. The Foundation’s goals, detailed below, communicate the big ideas that will help reach the envisioned future vision as well as provide some indication of actions to be taken. The strategies for each goal specify approaches that the Foundation will take in efforts to accomplish its goals.

Over the past 15 years, the Foundation has made significant contributions to the Cincinnati Jewish community. Its special focus has been capital investment in Jewish organizations and The Jewish Hospital and as such has provided the community with structures that will serve the community well into the future. It also has played an important role in creating and solidifying close ties between Jewish Cincinnatians and Israel.

The trustees recognized that this new era of funding required a much more detailed set of goals and strategies to guide the Foundation’s work and to provide the community with a full and complete understanding of what the Foundation intends to achieve. Developing these fully articulated, achievable and concrete targets, therefore, constituted the most difficult and intensive part of this planning process. It asked a lot of the trustees: Each had to reflect deeply – individually and as a group – about community priorities and needs and were called upon to think “big” and to represent the best interests of the community as a whole.

To complicate the process, the Trustees simultaneously needed to consider what new philanthropic “persona” the Foundation was willing and able to assume. Rosov Consulting provided the Trustees with definitions of the various relevant funding approaches and options, including some pioneered with great success only in recent years. Trustees were excited to learn that there are many effective approaches to philanthropic work beyond traditional grantmaking and resolved to think carefully about the most appropriate models for each strategy in order to achieve the greatest possible impact.

The Foundation thus far has primarily taken a **traditional** approach to funding, meaning that it gave grants based on the extent to which a project fit the Foundation’s defined interests. Going beyond the traditional approach requires a re-positioning of the funder as a social investor and problem-solver. **Tactical philanthropy** involves investing in great organizations that are solving big problems, and **venture philanthropy**, whereby marketplace principles are applied to philanthropy, is a type of tactical philanthropy. Those funders who want to create model solutions and develop new pathways typically turn to **strategic and catalytic philanthropic models**, which typically go beyond

investment in organizations to support a whole constellation of organizations and efforts that, together, achieve a larger goal of social change.

Outside of philanthropic models, foundations are able to structure their grantmaking so as to most effectively achieve their specific goals. Possible options include **capital grants, challenge grants, matching grants, demonstration project grants, general operating/unrestricted grants, and seed money**. Foundations also may decide to use funding to undertake vital background research, carry out surveys or other forms of qualitative or quantitative data collection and convene important partners and/or stakeholders.

These approaches are detailed in the Rosov Consulting Memo on “Philanthropic Approaches and Strategies,” December 10, 2010, which is included in the appendix section of this report.

The bottom line: doing philanthropic work well, wisely and strategically is a complex job. During their planning work, the trustees listened intently to their own and others’ voices as they deliberated on core goals upon which to focus and as they selected and specific strategies to pursue. Moving forward they will have to consider a variety of philanthropic models and roles the Foundation will employ (these will differ from strategy to strategy); and they will need to decide on the forms that individual grants will take.

What follows outlines the five new goals of the Foundation, the strategies it selected for each goal, and the philanthropic approaches that are likely to be used in exploring and addressing each strategy. It is important to view the strategies listed here as a “menu,” from which the Foundation will select and prioritize. In addition, each chosen strategy will be pursued on its own timeline – and some, in the end, may be determined to be less viable than others.¹

Goal #1 -- Basic Needs: Fortify the entire Cincinnati Jewish community by helping to ensure that the basic needs of all Jews are met, including housing, food, medical, transportation, and jobs.

On the path to determining the five goals that frame this strategic plan, the trustees grappled with the critical question of what was most important to them. It did not take long before they decided that prioritizing the basic needs of Jewish community members was fundamental to achieving the Foundation’s new vision. This need had certainly emerged as critical in the community interviews, and the Trustees knew intuitively that it had to be at the top of the list. Indeed, how could the whole Jewish community of Cincinnati be a vibrant one if some members of the community have to worry every day about basic needs like sustenance, shelter, and health care?

Further discussions about how to strategically approach this daunting goal led to a shared realization that this will be a tough nut to crack. While many different organizations in the city work to address discreet basic needs, the commitment to developing a coordinated system of care has been missing. It was acknowledged that the Federation, the United Way, the Greater Cincinnati Foundation, Free Store Food Bank and others have shown leadership in this arena, particularly during the recent “Great Recession.” And at the same time, the Trustees concluded that full success will require a sustained effort, significant ingenuity, multiple partnerships, substantial resources, and an unparalleled level of information flow and coordination. The Trustees saw what it would take, acknowledged the nature and size of the task, and took it on without hesitation.

¹ Tactics, the ground-level activities that the Foundation will need to undertake to enact its strategies, are to be developed in subsequent phases of planning.

STRATEGIES	ROLES
Facilitate a community-wide assessment to identify service targets and needs	Research Partner Convene
Facilitate a community-wide assessment of the current quality, rates, and coverage of existing services	Research
Build partnerships with civic organizations in Cincinnati that support, provide, and assess these services	Partner
Establish appropriate eligibility criteria for receiving services	Research Gather input Partner
Facilitate coordination and connection of services	Traditional grantmaking Partner Convene Demonstration projects

This goal overall and the particular strategies selected by the trustees call for the Foundation to become a visible community convener and leader, advocating for this issue, helping to create new alliances and new programs and not solely funding existing organizations to provide “more of the same.” Implementation will mean undertaking rather extensive research on these issues and, subsequently, helping the community to digest research and explore its implications. It will also require very careful shepherding of the process to engage all stakeholders and to enable effective coordination in the interest of achieving the end goal. As such, this goal will require the Foundation to become a catalyst for action on the issue of basic needs, i.e. assume a “Catalytic” approach to philanthropy. At various times, either the Federation or the Foundation may take the lead in the community as needed, and the Foundation may need to form partnerships with other Jewish and broader, community-based organizations.

Goal #2 – Jewish Educational Opportunities: Make all forms of Jewish education in Cincinnati exemplary by investing in institutional leadership, educators, institutions, materials, tools and programs.

Jewish education has been a part of every conversation about goals and strategies from the outset of this planning effort. Trustees have been very clear about how central and integral Jewish Education had to be in the ultimate plan of action. The challenge was finding the right elevation and points of focus. For example, the gravitational pull was to talk about issues like day school and camp - and the specific challenges of Rockwern and Camp Livingston - but trustees came to ask themselves whether these should be the only conversations they ought to engage?

Answering that question enabled the Trustees to unpack just what they believed were the essential elements of Jewish Education. It turned out their definition of Jewish Education was much broader - camps, youth groups, congregational schools, and other forms of informal Jewish education were identified as critical components. This perspective, informed by the Day of Learning, enabled the Trustees to develop strategies that could cut across and enhance all of these different educational frameworks, while leveraging exemplary resources already in place. This approach was not only

extremely satisfying to the Trustees, but confirmed and strengthened their commitment to making deep and wide impact within this domain.

STRATEGIES	ROLES
Develop and attract more first-rate educational leaders	Traditional grantmaking Partner Demonstration projects
Elevate the status of Jewish educators across the community	Traditional grantmaking Research Partner Convene Demonstration projects
Strengthen the sustainability and viability of Jewish educational institutions (financial and human capital)	Traditional grantmaking
Support improvements and enhancements of Jewish educational physical plants	Traditional grantmaking
Provide highest quality curricula and associated resources	Traditional grantmaking Research Partner
Upgrade and modernize instructional technology	Traditional grantmaking

Goal #2 requires a mix of Catalytic, Venture, and Conventional philanthropic approaches, as it involves, potentially, campaigning across a variety of different educational settings, capacity-building, and scaling up of existing capacity in schools and other settings. Among other things, the realization of this goal will necessitate hands-on work by Foundation staff with existing educational institutions; if it is to accomplish its goal, the Foundation must become deeply involved and invested in, and knowledgeable about the inner workings of these organizations.

Goal #3 – Leadership Development: Enhance all components of Jewish life by developing volunteer and professional Jewish communal leadership within organizations of all kinds.

A common and early realization among Foundation Trustees was that all of their ambitious objectives would only be as successful as the quality of the lay and professional leadership inside of the Jewish community. They came to a tough conclusion that there simply were not enough existing and up-and-coming leaders to facilitate the execution of their plan and lead the community towards their vision over time. Consequently they decided that investing in growing and improving Jewish communal leadership in Cincinnati was an essential priority. But first they had to answer a core question – where would they find these leaders?

The answer to that question ended up being two-fold. On the one hand, Trustees decided that many of the future leaders were already in the community, and the challenge would be to identify and develop them early and often. They also realized that existing leaders could play a big role in that work. On the other hand, the long-term vision of making the Cincinnati Jewish Community a more attractive place for Jews to move and stay brings with it the prospect of new leaders coming in from the outside. The combination of building on internal capacity and attracting excellence from the outside provided an exciting well-rounded approach to this important aim.

STRATEGIES	ROLES
Identify and “tap” emerging and potential younger leadership	Traditional grantmaking Research Gather input Partner Convene Demonstration projects
Develop a suite of opportunities for growth and development of existing and emerging leaders	Traditional grantmaking Research Gather input Partner Convene
Engage existing and veteran leaders to actively be involved in the above efforts (identification and tapping of new leadership)	Traditional grantmaking Convene
Engage existing and veteran leaders to actively be involved in the above efforts (identification and tapping of new leadership)	Traditional grantmaking Convene
Expose existing and emerging leaders to “the greats” in the field beyond Cincinnati	Traditional grantmaking Research Partner

Implementation of Goal #3 will involve enhancing what already exists as well as adding new ideas, programs and people to the current mix. Like Goal #1, this goal will require the Foundation to play a public convening role, constantly learning and advocating through its actions for the merits of working together to achieve positive results for Jewish Cincinnati. Implementation, therefore, will combine the Traditional and Venture approaches and will also involve an initial stage of research and planning.

Goal #4 – Continuity of Jewish Involvement: Facilitate system-wide integration of services and programs to enable ongoing/lifetime involvement in Jewish life.

One shared “takeaway” from trustee discussions on this topic and some of what was offered at the Day of Learning was that things are changing fast in the Jewish communal landscape, and that engaging compelling services, programs, and activities are springing up everywhere, even in the most informal settings. They do not necessarily require paid staff to be initiated or implemented, and are often only known about by a small segment of the population. Another insight, supported especially by the stakeholder interviews, indicated that the totality of offerings “from cradle to grave,” formal and informal, were not well coordinated or connected. These two realizations raised many important questions. Beside the obvious dilemma of how to create a service continuum given these realities, the Trustees also knew they had to answer these questions first - Where are the gaps in service? Why and at which points do people tend to drop out of participation in Jewish communal activity?

Trustees acknowledged that this goal is going to involve a significant amount of learning before doing. Answering these questions would take time and concerted effort. Yet with more information and a deeper understanding of the challenges, Trustees felt that taking on a large coordinating goal

like this would be more doable, and that it had the potential to transform the way in which people move through the stages of their lives as Jews in this unique community.

STRATEGIES	ROLES
Identify and assess gaps in service across the life continuum	Research Gather input
Identify and assess main reasons for drop-offs and dropouts at various points	Research Gather input
Devise plan to enable and support local organizations to cooperate and coordinate within a deliberate service continuum	Traditional grantmaking Research Gather input Partner Convene

Goal #4 is the facet of the Foundation’s new strategic direction with the broadest potential impact on the community, because the Foundation has enough autonomy to take a “high-altitude” look at the community and to identify gaps in the “Jewish experience.” These strategies essentially involve planning to plan. This is Catalytic philanthropy at its best. The intention of this strategy is to maximize the effectiveness of disparate programs and services by creating new connections, synergies, and relationships. Programs and services also live in many places, sometimes outside of typical institutions. The Foundation will want to harness the best of what is happening and help create continuity within the cradle to grave context.

Goal #5 – Israel Connection: Promote meaningful connections to Israel in order to deepen Jewish identity and involvement in Jewish life.

Connection to Israel has been a cornerstone of Foundation priorities over the years. Indeed, the Jewish Foundation of Cincinnati’s Israel Travel Grants program has received national acclaim and has demonstrated proven evidence of impact. The Trustees did not have much doubt this emphasis would continue. However, conversations about Israel, always complex, did not easily lead to shared agreement about why it was so important. Trips to Israel had been supported and facilitated for years, but to what end? Was it about supporting the Jewish State, Zionism, and building stronger Jews? The Board had to struggle with this question on a number of occasions, and eventually arrived at a point of agreement – The commitment to promoting connection to Israel was tied to a deeply held belief that such a bond actually strengthened and deepened Jewish identity, and increased the likelihood of sustained involvement in Jewish life. While this understanding unified the Board around this particular goal, one hard question remained: Was this just about trips to Israel, or was there something more?

Of all the strategy development, work within this goal was the least clear. Israel trips had been the primary means for connecting to Israel, but those trips are increasingly expensive and many asked if there were other ways to get to the desired result. The Day of Learning provided some additional perspectives on this issue – with so many new tools and technologies available these days, the potential seemed enormous for discovering new pathways to connect with the place and the people of Israel. The idea of complementing great trips with new avenues for making this vital connection struck the Trustees as a perfect compliment of approaches.

STRATEGIES	ROLES
Support opportunities for Israelis and Cincinnatians to connect with one another via a variety of methods.	Traditional grantmaking Research Partner
Support opportunities for Cincinnati Jews to travel to Israel	Traditional grantmaking Research Partner
Support opportunities for individual community members to have improved access to resources and information related to Israel.	Traditional grantmaking Research Convene

As is often the case with work of this type, the Foundation’s role in enacting Goal #5 will primarily be in the arena of traditional grantmaking (or “conventional philanthropy), primarily providing support to existing, proven efforts by specific existing organizations or programs. The Foundation will also continue to play a leading role in commissioning research and evaluation to assess the impact of this work, especially as it relates to additional demographic sub-groups that might be included in the Travel Grants program moving forward. This is an exciting area of expansion for the Foundation.

III. Contributions to the Process

Recognizing that a new framework for the Foundation could not be created in the abstract, Rosov Consulting provided the trustees with information that would help motivate and guide their thinking.

Formal research was undertaken and presentations were made on (1) Foundation grantmaking from 1995- 2010; (2) major issues and trends in the North American Jewish community, with focus on patterns in Israel engagement, innovative efforts to engage young adults, and the latest thinking in “cradle-to-grave” education.; (3) views of 58 community members (including all 11 Trustees), with whom interviews were conducted, yielding a window into the perceived challenges of and dreams for the Cincinnati Jewish community; and (4) philanthropic models and approaches available to the Foundation, an important input as the Trustees decides on its new philanthropic role(s) (more fully described in the appendix section of this report).

The key inputs came in the form of expert presentations, memoranda, and facilitated discussions and are summarized in Figure 2 below.

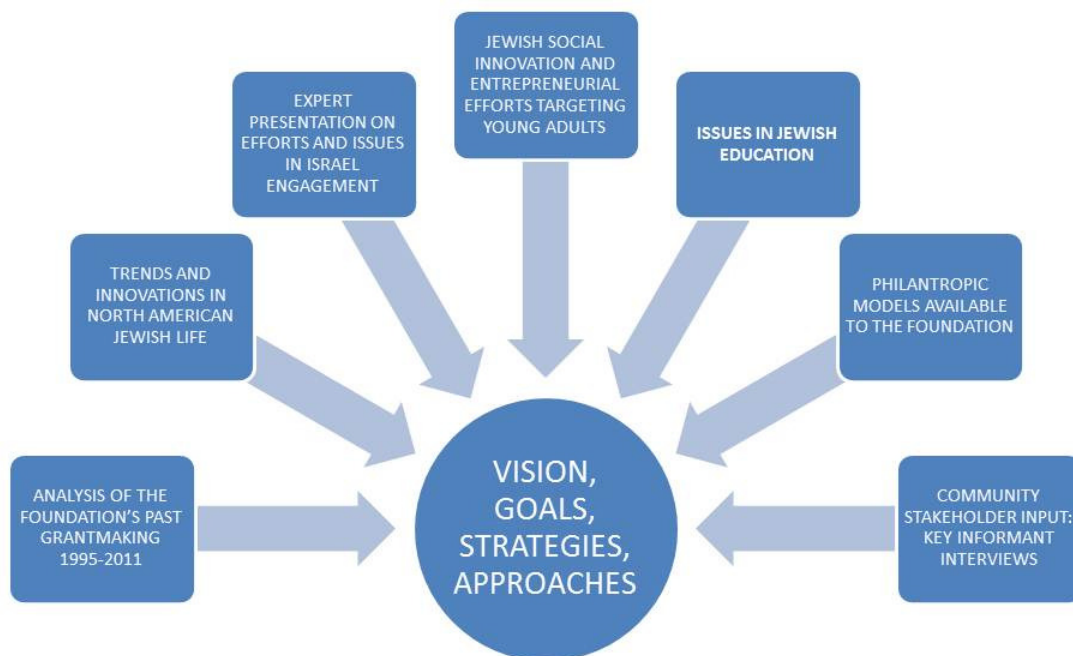


Figure 2: Inputs that Shaped the Foundation’s Decisions

A Brief History of The Foundation’s Operations 1995-2010

Rosov Consulting conducted an analysis of the Foundation’s past grantmaking, providing the trustees with a fresh look at past patterns. From 1995 to 2010, the Foundation’s grant making focused on capital projects in the Cincinnati Jewish community, medical capital initiatives (primarily at the Jewish Hospital of Cincinnati but also in Israel), and, to a lesser degree, non-capital projects that enhance the Cincinnati Jewish community.

For most of its existence, the Foundation operated with a part-time administrator and a relatively informal grants process. Foundation guidelines invited proposals in the Foundation’s general areas of interest. The Foundation did not have in place regular reporting or evaluation procedures. The Foundation’s *modus operandi* could be described as almost exclusively focused on “traditional” grantmaking, a distinction that gained importance as trustees began to examine the multitude of other modalities available to today’s philanthropic sector.

For a more detailed overview of the Foundation’s past grantmaking activity, see Rosov Consulting’s memo entitled “Foundation Grantmaking, 1995 – 2010, 100K+,” included in the report appendices.

Trends in North American Jewish Life

Presentations on current developments in the North American Jewish community were made at the Board retreat by experts in the field including: Shaul Kelner, Assistant Professor of Sociology and Jewish Studies at Vanderbilt University, Ari Kelman, Associate Professor of History at University of

California - Davis and Harlene Appelman, Executive Director, Covenant Foundation. Trustees were given ample time to ask questions and discuss and debate the issues. Overall, this part of the process provided the Trustees with new perspectives on the exciting possibilities available for the Cincinnati Jewish community and the concomitant challenges that will need to be overcome.

The following are brief summaries of the experts' presentations:

Overview: Innovations in Jewish Life

Over the past decade or so, as the Jewish community itself has become more heterogeneous, the community's interests have become much more diverse. The resulting tensions – between diversity and unity and tradition and change -- have been challenging for a Jewish community. Many are asking: Is it still possible to represent shared concerns or interests of the American Jewish community and if so how? Should we forgo the “big tent” concept and embrace a new approach, that of interdependent networks? What impact would doing so have on the unity of the Jewish community?

Israel Engagement

Over the past 20-30 years the North American Jewish community has seen a shift away from mass mobilization and broad consensus for supporting Israel to a much more fragmented, direct, more partisan, issue-specific engagement with Israel. In 1967, a crisis year, 78% of the federations' UJA campaign was earmarked for Israel; the proportion dropped to 47% in 1990 and 23% in 2004. Similarly, as of the late 1980s, American Jews were transferring twice as many dollars to Israel through the various ‘friends of’ agencies as they were via UJA contributions. In 2008 alone, the Israeli non-profit sector collected an estimated \$1.5b in contributions from foreign donors and foundations, most of it from American Jews. At the same time we have also seen the rise of trans-community interventions based on concerns about Israel attachment -- BRI, iCenter, and Makom. These are three different models with very different approaches on how to effectuate “Israel engagement.” The interventions are spurred by a concern about individual disaffection, but they have the effect of creating a more robust institutional field of Israel engagement than existed previously.

Jewish Social Innovation and Young Adults

Innovation is taking place in every imaginable expression of Jewish life, formally and informally, online and offline, and largely outside the purview of synagogues, federations, and national Jewish organizations. Innovation is changing the map of Jewish communities, reshaping the dynamics between organizations and individuals, and diversifying the markets for Jewish engagement and the creation of meaningful Jewish experiences. The emergence of much innovation is tied to influx of significant funding from private Jewish foundations and individuals.

Jewish Education

Education alone, in a voluntary system, is now known to be much less effective than education with “wrap-around” services. The ideal is to provide “cradle-to-grave” options for all that are “open” (welcoming and financially accessible), “remixable” (service and content available in various ways), meaningful/relevant, and community-building. Jewish education is not just about “schooling” – Jewish education is camping, youth groups, Maccabiah Games, community service, etc. Those leading these programs and facilitating identity-building experiences in these venues ought to be considered Jewish educators just as the teachers in our day schools. Many examples of excellent Jewish educational experiences and programs already exist. There is much to be learned from the work of at least three Jewish philanthropies that have been toiling in this field for nearly two decades, including the Covenant Foundation, the Wexner Foundation, the AVI CHAI Foundation and, more recently, the Jim Joseph Foundation.

Insights from Community Key Informant Interviews

During the planning process Rosov Consulting conducted 46 confidential interviews and 1 focus group, speaking with 58 people in all. Interviewees included: all 11 Foundation trustees and the executive director; and lay leaders, clergy, and professional staff from day schools, supplementary education programs, Jewish camp, ritual service organizations, social service agencies, congregations (Reform, Conservative, Orthodox, and Humanist), Chabad, teen programs, Federation, HUC, JCRC, JCC, University of Cincinnati Jewish Studies and student life, and Holocaust education.

This aspect of the strategic planning process had a dual purpose: to inform the Foundation's decision-making and to let the community as a whole know that the Foundation was interested in, and would take seriously, the views of key players in Cincinnati's Jewish community. Interviews focused on: (1) Top challenges in the Cincinnati Jewish Community; (2) Key Informants' Vision for an Ideal Jewish Community in Cincinnati; and (3) Perspectives on the relationship between Federation and Foundation²

The individuals interviewed provided a variety of perceptions and interests informed in part by the large constituencies with which they work, making them opinion "aggregators" of sorts. While this type of research does not yield statistically-significant data, it does reveal the reasoning behind the perceptions and aspirations of the community, and as such, is an effective way to inform the judgment of the Foundation trustees.

Highlights of Key Informant Interview Findings

Interviewees displayed an ability to take a broad, community-wide approach to solving perceived challenges in Jewish education, basic needs, lack of involvement, and other issues. **Interviewees were in agreement about the key challenges facing their community, many of which** are common to cities of this size. Most interviewees seemed quite able to think outside their own parochial constituencies: they clearly cared about, and saw the overall needs of, the entire community when describing challenges.

Throughout the interviews, the Rosov Consulting team heard tremendous excitement expressed among the community's leaders for the work of the Foundation, its ongoing expansion and strategic planning, and the future in general. When we asked people to describe the most exciting thing happening in Jewish Cincinnati, a number said, simply, "this process." One person elaborated: "A lot of people want this to be a community of excellence. I am willing to be persistent. There is a lot of momentum now." At the same time, almost every interviewee expressed an interest in understanding better how the foundation makes its decisions. Some perceived decisions to be somewhat arbitrary and relationship-driven. In general, people talked about wanting to have "skin in the game," wanting to be part of Foundation decision-making and work. They interpreted this planning process, with its stakeholder research component, as good evidence of a possible new approach.

(1) Top challenges in the Cincinnati Jewish Community

Key informants were asked what challenges they see for the Cincinnati Jewish community today. The major themes that emerged were **struggling Jewish organizations; a shortage of engaged individuals; unmet basic needs; and challenges for the Modern Orthodox community.**

² Interview and focus group protocols can be found in the appendix section of this report.

Struggling Jewish Organizations

Interviewees expressed much concern over the **financial health** of Jewish communal organizations in Cincinnati: almost every agency carries a budget deficit, some more than others. Some agencies linked their chronic shortfall to the obligation to offer programming to the entire community, and not obtaining remuneration in return. **Rockwern Academy** in particular has seen a decline in enrollment over ten years from 420 to 180 students, leading to financial instability and the attendant questions about long-term viability. Deep concerns about educational quality were expressed. Some expressed that the prevalence of Reform Jews in the city is a challenge to any day school. In addition, some felt that a **lack of community coordination and prioritization** has encouraged a proliferation of organizations that may or may not be justified. For some, there are too many organizations, and especially too many synagogues functioning in isolation. Interviewees of varying backgrounds and perspectives expressed concerns about institutions behaving in ways that are competitive and territorial, stifling creativity, efficiency, and innovation.

A shortage of engaged leaders and community members

Though recent research indicates no significant decline in the Jewish population of Cincinnati³, participants nevertheless decried a perceived exodus of **young Jewish professionals**, as well as **geographic dispersion**, a **small leadership pool**, and the challenges of reaching out to the masses of **uninvolved Jews**. Many key informants wondered how to find ways to attract people to the community - new “gateways” during college, incentives for young adults, entrepreneurs, Jewish professionals. This is not only about population regeneration but also about bringing fresh talent to the Jewish leadership pool. Regarding geographic dispersion, except for Amberley, there is no “critical mass” area where Jews live in Cincinnati, with younger families moving farther North. Some participants bemoaned the lack of a communal feeling.

On the issue of a small leadership pool, interviewees expressed a clear concern about a “musical chairs” situation in Jewish leadership, both among professionals and volunteers. One person described the situation as “incestuous;” another complained that “the same people with the same agendas lead everywhere.” One person was concerned about these individuals losing steam or burning out, and the community being left without others to replace them. Finally, key informants expressed a strong desire to engage “loosely affiliated” Jews and enable them to feel like “real stakeholders” in the community. We heard repeated concerns by key informants about the challenge of “meeting people where they are.” One person referred to groups seen as “second and third circles out”— Jews who don’t choose to participate in a large number of community activities, programs, or events and indeed may not be aware of them.

Unmet Basic Needs

Several interviewees expressed a deep concern about **Jewish poverty in Cincinnati**, and exacerbating factors such as the region’s slow economic recovery. Further, interviewees who focused on this issue shared their feelings that it is simply unacceptable for any Jewish community to tolerate poverty among its own. Interviewees also expressed concern about a “senior tsunami” of **elderly Jews**, positing that all of the current programs serving older adults could be overwhelmed by demand in ten years. Professionals from various Jewish communal organizations serving low-income individuals and families expressed consternation at the data point generated by the community’s 2008 study estimating a total of nearly 1,100 Jews qualifying for “low income” status when the local Jewish Family Service reports serving approximately one-tenth of that number in that category.

³ The Jewish population study conducted in Cincinnati in 2008 revealed a Jewish population of approximately 27,000 in 12,500 households. The study conducted in 2003 identified 16,723 households but did not provide a population estimate. The 1987 study, however, estimated the Jewish population as just over 25,000.

Challenges for the Mainstream Orthodox

Key informants across denominational lines underlined the importance of maintaining a “mainstream” (or Modern) Orthodox segment of the Jewish community. Some worried about the decrease in the population of mainstream Orthodox Jews. The lack of kosher restaurants and food sources and a viable Jewish high school means Cincinnati is not likely to be a serious option for observant Jewish families.

Challenges for the Jewish Community of Cincinnati - Implications

Community informants spoke with a clear and virtually unanimous voice about the primary challenges facing the Cincinnati Jewish community. Their priorities for future action were also shared by the Trustees, who molded these problems into opportunities for positive change. Guided by the collective community sentiments, they made a collective commitment to address the basic needs of Jewish community members, confront Jewish institutional crises (especially within Jewish education), develop new generations of Jewish lay and professional leadership, enhance partnerships among local Jewish organizations, and build strong community connections to Israel. To maximize alignment with community ideals and values also expressed in the interviews, the Trustees crafted Guiding Principles that will inform, direct, and redirect **how** work is actually done. Perhaps the most overarching agreement reached as a result of the stakeholder interviews and Board deliberation was a conclusion that facilitating community-wide participation and coordination was a critical key to success. The Board concurred that the kind of results and impact they were seeking would not be possible without the work of thousands of people who believe in the vision, and that the work of implementing this plan must be a joint communal effort of unprecedented proportion.

(2) Vision of an ideal Jewish community in Cincinnati

Interviewees were asked to imagine twenty years into the future and share their visions for an “ideal Cincinnati Jewish community,” a scenario in which all the goals are met and all challenges overcome. The key informants’ visions can be summarized as portraying a community in the future that is a vibrant and accessible Jewish destination.

A Vibrant Jewish Destination

Interviewees envisioned a community where there are businesses and restaurants where Jews congregate, an **active Jewish social life** (a *Shtetl* in the most positive sense) in which people are forming deep, meaningful relationships, and a **community that is “on the map for young people,”** generating a **critical mass of Jewish creative people**. They imagined a “**wide variety of religious worship outlets,**” *minyanim* of all types, *havurot*, new formats for congregational schools, more internet-based ways to express oneself Jewishly. In this view, there is a **diversity of venues for Jewish programming** - not just at the JCC or synagogues, including “satellite programming,” creating a “borderless Jewish community.” As a result it was envisioned that young professionals who are Jewish would come to Cincinnati and stay.

One central pillar of the vision for a vibrant Jewish destination was developing a reputation for excellence in Jewish education. In this scenario, **Rockwern Academy is competitive with the best public and private schools**, enrolling up to 450 students, offering the latest technologies and many extracurricular activities, including athletics, with a \$20 million endowment. Key informants visualized Rockwern students who are fluent in Hebrew, are immersed in Jewish text, and have “pen pals” (or the 21st century, networked version of such) in Israel. They would have access to a special education track, guidance counselors, a nurse, a librarian, and occupational and speech therapy.

In short, the vision for Cincinnati is to be the envy of other communities: it is flourishing and unique -- not just surviving. At the very least, they want to be seen as the best in the Midwest, able to

compete with St Louis, Columbus, Pittsburgh, Milwaukee, Indianapolis, and others and can even envision aggressive efforts to “market” Cincinnati as a Jewish destination.

An Accessible Community

In the key informants’ vision, there are **no economic or religious barriers** to accessing Jewish preschool, day school, camp, travel to Israel or synagogue life. With regard to day school, it’s not sufficient that the school be academically excellent – it must be affordable to all. Members of the Jewish community take universal pride in the **special connection to Israel** among Cincinnatians, and in the Israel Experience program. In the ideal world, Cincinnati offers many opportunities for travel to Israel, including possibly –going once a decade, and special Israel trips for adults, professionals, intermarried couples, and seniors. There are even El Al flights going directly from Cincinnati to Israel!

Another dream is that Jewish residents of Cincinnati who are currently **“outsiders” to the community have many more options**. There are specific and aggressive outreach efforts to these groups. Programs take place in multiple settings, not just inside institutions. Cincinnati embraces “Big Tent Judaism” and offers “more windows in.” In other words, Cincinnati has entry points and programming for everyone: specific affiliation groups (e.g. GLBT Jews)’ specific interest groups (e.g., those interested in the environment); specific demographics (e.g., young people), etc.

Vision for the Cincinnati Jewish Community -Implications

The leadership of the Jewish community of Cincinnati is not short on vision or creativity. There seems to be minimal difficulty focusing on the needs of the community as opposed to the parochial interests of individual institutions. In fact, what emerges from concurrent Foundation and Federation planning efforts is a coherent, widely-shared vision of a vibrant future for the community. Given these shared aspirations, the Foundation appears perfectly poised to partner with organizations, donors, and community leaders to reach the ambitious vision of a vibrant Cincinnati Jewish community.

(3) Roles of Foundation and Federation

Conscious that the public at large is curious about how the Federation and Foundation, as two large communal entities concerned about the present and future of the Cincinnati Jewish community, will relate to each other, interviewers probed community stakeholders about the optimal roles for both and the ideal relationship between them.

Optimal Federation Role

According to key informants, the optimal roles for the Federation to play in the community include insuring the provision of day-to-day vital services; identifying community needs and gaps; providing technical assistance; strategizing for the community as a whole – keeping a “finger on the pulse;” convening disparate community groups; building community consensus; and supporting community wide programs.

“Federation’s job is to make sure that no patch is missing in the community quilt”

Optimal Foundation Role

Almost all of the roles mentioned centered on innovation. Interviewees want the Foundation to be a game-changer: i.e. be a “disruptive” visionary, innovative, use venture philanthropy models; enable institutions to take risks; be the “R&D [research and development] division” of the community; and do more than capital projects.

Relationship between Federation and Foundation

A number of interviewees opined that the Foundation should be the “treasury,” and the Federation should be the operational “distributor.” Some wondered whether the two organizations should keep an “arm’s length” or if they should work in lockstep. Interviewees considered that, on the one hand, working too closely together could limit the Foundation’s freedom and ability to innovate and be creative. On the other hand, many felt that the two entities cannot have “separate scripts.” One interviewee went as far to say that it would be a mistake to “crown” one institution, especially one whose decisions “are made by a few and that isn’t perceived as ‘of the people.’”

Relationship between Federation and Foundation - Implications

It is anticipated these conversations on the relationship between and roles of the Foundation and Federation will continue throughout the initial stages of the Foundation’s implementation of its strategic plan. While much cannot be pre-determined at this time given the Federation’s concurrent convening of a community-wide visioning and planning process that was still in process by the time the Foundation concluded its strategic planning process, a number of insights regarding the relationship between these two key community players emanated from the key informant interviews conducted as part of the Foundation’s planning process. The Foundation and Federation will need to explore and decide upon the best ways to work towards shared goals. Within each initiative, goal, or strategy, the two parties will benefit from identifying the most appropriate and effective partnership arrangement (see Partnership Continuum below). This will undoubtedly require a continued investment of time and energy, with staff and leaders of both institutions sufficiently engaged to achieve maximum impact, efficiency, and alignment. Doing so will not always be simple, but with leadership of both organizations fully dedicated to the process and the community aware of possible pitfalls, signs are good that the organizations and the community will be able to handle the new responsibilities. In the words of one interviewee, ***“If done right, this could be absolutely transformative!”***

IV. Relations With Other Communal Organizations

The Foundation’s leadership is keenly aware of the need to maintain and further develop the community’s rich participatory heritage and ethic of volunteerism in this new context. For well over a century, the Jewish Federation of Cincinnati, served by many dedicated lay leaders, has had primary responsibility for planning and funding the vitality and the future of the Cincinnati Jewish Community. With an annual campaign currently generating approximately \$5 million and a \$30 million endowment, the Jewish Federation of Cincinnati has played a central role in the overall health and well-being of the local Jewish community and beyond for nearly 115 years.

Throughout the planning process, numerous people, inside and outside the Foundation have voiced the concern that the introduction of an entity with so much greater Jewish funding capacity than the Federation has the potential to disturb the community balance if not handled with great care. Of course, it has the potential to create the kind of change and impact that has always been elusive. Striking the right balance between the actual and perceived independence of the Foundation, the interdependence of the two institutions, and broad community participation will be a key to success.

In addition to partnering with the Federation, the Foundation will work closely with other organizations when appropriate. To ensure clarity of roles, responsibilities, and expectations, the Foundation will use the Partnership Continuum to help articulate the nature of organizational relationships within each individual situation.

Rosov Consulting provided this framework to enable Trustees and staff to differentiate and tailor these important relationships, one at a time. In discussing the purpose and use of the Partnership Continuum, Foundation trustees came to understand its value, and made a commitment to implementing it at the outset of considering any potential partnership.

The Partnership Continuum – ways to work with other organizations

Communication - Information is shared both ways between parties as a courtesy, enabling greater awareness and knowledge of the other.

Cooperation - Efforts are made to enable the activities of both parties to occur in parallel without disruption. Some effort is made to assist one another in achieving respective goals, when feasible.

Coordination - Both parties work together to facilitate a smooth and productive interaction between and among their mutual activities. This intentional effort has the potential to improve outcomes and relationships.

Collaboration - This relationship depends on aligning around mutual goals and principles, pooling/sharing resources, and holding one another accountable, when appropriate, all in order to maximize impact and results.

Integration - Operations, administration, and even governance are near seamless and sometimes indistinguishable when two parties make this commitment to join forces on a shared mission.

The Foundation vision is ambitious, and building the road to get there is going to require many hands, hearts, and minds. Indeed, the Foundation must focus on how to get the work done, not on doing it, so developing the capacity to build robust partnerships of all kinds with the Federation and other organizations along the way will be absolutely vital.

V. Foundation Infrastructure

In addition to providing formal research and presentations, Rosov Consulting conveyed information -- primarily via one-on-one phone and in-person sessions between the consultants and Foundation trustees/staff -- on a variety of matters, with special focus on (1) Foundation administration and infrastructure needs; (2) strategic communications, i.e. managing public awareness and perception of the Foundation during the planning process, and beyond; and (3) relations with the Federation and other entities.

This section focuses on guidance provided by Rosov Consulting on Foundation infrastructure. The consultants emphasized that the new level of grantmaking, as well as the newly crafted, ambitious grantmaking agenda, represent a major expansion that will necessitate a build-out of Foundation infrastructure -- including, among other things, human resources, grant process design and administrative budget.

At this point in the Foundation's development, and until the Board of Trustees definitively settles on an implementation plan with well-defined activities, it is too early to determine appropriate administrative spending levels, funding ratios, or staffing requirements. Rosov Consulting did, however, attempt to provide quantified guidelines in these areas by drawing on both published data and Rosov Consulting team experience.

A 2008 report (with data from 2001 – 3) from The Urban Institute, the Foundation Center and GuideStar entitled “What Drives Foundation Expenses and Compensation” and a 2010 Foundation Management Series issued by the Council on Foundations on March 6, 2011 (with data from a 2009 survey)) is a helpful starting point for determining appropriate administrative spending for the Foundation.

The 2008 report reveals that a median of 8% of qualifying distributions of the 10,000 largest independent foundations were used for charitable administrative expenses. The most common expense ratio for staffed foundations in the United States was 5% of qualifying distributions, and most independent foundations had expense-to-qualifying-distributions ratios of under 10%. Paid staff has the greatest effect on operating costs.⁴ The 2010 Council on Foundations study reports a median 15.8% share of qualifying charitable distributions toward administrative expenses (based on responses from 234 staffed and independent and family foundation).⁵ One might infer from these figures that, for the JFOC, an appropriate range for administrative expenses would be \$625,000 - \$2.37 million (based on grantmaking levels of \$12.5 to \$15 million).

The 2008 report provides the following important caveat to all of the statistical information it offers: “Foundations differ significantly in their structures, resources, and operating characteristics and these differences significantly affect their expense levels. Even among foundations of the same type, difference in assets, giving levels, work styles, geographic reach and program type vary dramatically and account for wide variations in expense and compensation patterns.” (p. 48). This is to say that the “right” administrative budget will depend strongly on how and what the JFOC chooses to fund. In addition, the 2010 report notes that larger foundations generally reported lower expense ratios due to economies of scale, so, as a sizeable foundation, the JFOC may not want to strive for the higher end of the spectrum.

The Foundation Center’s reports appear reluctant to list typical staffing sizes and configurations, citing instead the need to consider foundation activity and structure. As the JFOC fine-tunes its strategies and activities (Phase 2), additional research in this area will be helpful, and could include, among other things, mining information from the Foundation Center’s database (which requires a subscription), and, perhaps most helpful, collecting information about the staffing and operating costs of other foundations (Jewish and non-Jewish) with similar interests and assets.

Based, however, on the new “direction and focus” of the Foundation, we anticipate the Foundation requiring one to three full-time (or full-time equivalent) program officers in addition to the executive director and an administrative person in order to accomplish proposed activities effectively and efficiently. Although those hired must be or become extremely well versed in the local Cincinnati Jewish community, it also will be essential that they are knowledgeable about national Jewish community affairs and, ideally, have funding experience. If the Foundation decides to embark on a “catalytic philanthropic” effort,⁶ it may also need to consider hiring someone with area expertise.

In at least the near term, the Foundation may also continue to contract out research and even some aspects of program development.

⁴ Elizabeth T. Boris, Loren Renz, Mark A. Hager, Rachel Elias and Mahesh Somashekhar, “What Drives Foundation Expenses & Compensation? Results of a Three-Year Study,” The Urban Institute, Foundation Center, GuideStar, 2008, pp. 24 – 26. An updated report is due out in May 2010.

⁵ Foundation Management Series, Council on Foundations, March 6, 2011, online executive summary.

⁶ Memorandum on “Philanthropic Approaches and Strategies,” Rosov Consulting, December 10, 2010: “Catalytic Philanthropy takes the strategic philanthropic approach to giving. See also above, in this report.

VI. Concluding Thoughts and Looking Toward the Future

As the Jewish Foundation of Cincinnati embarks upon a new era and the journey of implementing its ambitious and exciting strategic plan, it can take great pride in its incredible accomplishments during the first 15 years of its existence. Having supported and enhanced a wide array of Jewish communal institutions from 1995-2010, the Foundation has succeeded in laying the groundwork for more catalytic and transformative work over the next 15 year (and beyond) period. The Board of Trustees of the Foundation is to be commended for its hard work, commitment and dedication exemplified throughout the planning process. While significant work lies ahead in implementing the plan, the Foundation is already well on the way to making the transition to an exponentially increased annual pay-out, an enhanced professional infrastructure, and a continuum of partnership opportunities that will ensure success and the “rising of all boats” in the community. Rosov Consulting has been pleased and honored to be involved in such an historic and important process and we are grateful to the Board of Trustees for this opportunity.

VII. REPORT APPENDICES

MEMORANDUM

To: The Board of Trustees of the Jewish Foundation of Cincinnati
From: Rosov Consulting, LLC
Re: Overview of Jewish Cincinnati Facts & Figures of Relevance
Date: December 8, 2010

The source of most of the demographic information cited below is the 2008 Cincinnati Jewish Population Study as interpreted by local Federation personnel. Rosov Consulting did not have access to data sets, and it is beyond the scope of our consultancy to review or analyze these raw data. While we are confident that, taken together, the data presented below paint a relatively accurate picture of Cincinnati – one that can be used for decision-making by the Foundation -- we do not stand behind each data point and, in fact, are somewhat concerned about the imprecision we observed in analysis, interpretation and presentation.

General

- An estimated 27,000 Jewish persons live in 12,500 Jewish households in the Greater Cincinnati area.
- 81% of Cincinnati Jewish households with children under 5 have incomes under \$150,000.
- 64% of Community Study respondents said that they do not feel “strongly connected” to the Jewish community. Two-thirds of those are interested in increasing their connections to being Jewish.
- Attended a Jewish or Israel-focused cultural event in the last three years?
 - 73% of those in their 20s
 - 59% of those in their 30s
 - 66% of those in their 40s
- Belong to/participate in activities of a Jewish organization besides synagogue/temple or JCC?
 - 46% of those in their 20s
 - 31% of those in their 30s
 - 32% of those in their 40s
- Of the households with children under 18, the highest percentage (40%) lives in the Blue Ash/Kenwood/Montgomery area, 23% in the Mason/Loveland area, 17% in the Amberley/Golf Manor/Roselawn area and 12% in the Hyde Park/Oakley/Mount Lookout area.

Synagogues and Denominations

- There are 15 synagogues in the Greater Cincinnati area: 3 Orthodox, 5 Reform, 5 Conservative, 1 Reconstructionist and 1 Humanist.
- 60% of Jewish households report synagogue/temple membership, higher than in any comparably-sized Midwestern community, and high on a national basis
 - 28% – of those 20-29

- 63% – of those 30-39
- 64% – of those 40-49
- Income is strongly correlated to congregational membership: Under \$25,000 – 35% report membership, \$25,000 - \$50,000 – 52%, over \$150,000 – 76%.
- 47% of respondents identify as Reform Jews; 27% identify as Conservative, 5% as Orthodox, 5% as Humanist, 6% as non-denominational, and 10% have been classified as secular.
- 46% of those who report that they are not members of synagogues are baby boomers.
- Of the Jewish households with children 0 to 4, 26% identify as Conservative, 47% as Reform and 12% as Orthodox.
- Families with children (and especially children under 5) are the ‘hottest’ market for synagogues in terms of potential members, but they are not the largest market.

Intermarriage

- The intermarriage rate is 34%, similar to patterns found in other mid-size Midwestern cities.
- 38% of all intermarried Jewish households report synagogue membership, higher than in any other Jewish community in the United States.
- 48% of the married people under 40 are intermarried.
- 60% of children in intermarried households are currently being raised as Jewish-only.
- 58% of couples in Cincinnati Jewish households who married since 2000 are inter-married.
- Over 1,000 children 0 to 4 (76% of total) are being raised “Jewish only.”

Jewish Education

- Overall, 95% of all children being raised as Jewish or the few Jewish-and-something else have had some Jewish education, including 87% of Jewish-raised children with intermarried parents.
- 40% of respondents had engaged in organized Jewish study in the past 3 years. Of the 60% who didn’t, 42% wished to know more about being Jewish.
- 25% said they “strongly agree” with the statement “I wish I knew more about being Jewish.”
- 79% of respondents said it was very important for their children to be knowledgeable and to appreciate Jewish beliefs and values.
- 23% of those with minimal Jewish education as children are intermarried compared to 41% of those with no Jewish education as a child.
- 73% of respondents who reported day school educations are in-married, compared to 22% intermarried.

Jewish Preschool

- There are an estimated 1400 children aged 0 to 4 living in Jewish households.
- There are 4 Jewish pre-schools in the Greater Cincinnati area
 - 56 students are currently enrolled in the preschool program at Cincinnati Hebrew Day School;
 - 55 are enrolled at Rockwern Academy preschool;
 - 116 are enrolled in the JCC's Early Childhood program;
 - There is a Chai Tots pre-school program run by Chabad in Mason, Ohio, but the Federation is unsure of how many children are enrolled there.
- For children 0-2, 20% of parents report that these children are in Jewish pre-school (nursery school) and 17% in non-Jewish school.
- For children 3-4, 55% of parents report that these children are in Jewish pre-school (nursery school) and 40% in non-Jewish school.
- 64% of 3 and 4 year olds being raised "Jewish only" are reported to attend a Jewish pre-school or nursery school program.
- Of the households with children ages 0 to 4, 24% live in Loveland/Mason, 23% in Blue Ash/Kenwood/Montgomery, 22% in Amberley/Golf Manor/Roselawn, 21% in Hyde Park/Oakley, 7% in Wyoming/Finneytown.
- When asked if cost had prevented them from sending their child(ren) to Jewish pre-school, "yes" was the answer from 8% of those in Amberley/Golf Manor/ Roselawn, 10% of those in Blue Ash/Kenwood/Montgomery and 30% of those in Loveland/Mason.
- 44% of Study respondents whose children were not in Jewish pre-school had incomes under \$50,000. 43% of them said that financial cost had prevented their participation.

Jewish Day School

- 38% of Orthodox respondents, 11% of Conservative, 10% of Reform, 11% of non-denominational, 8% of secular and 0% of Humanist respondents reported day school education as a child.
- When asked if cost had prevented them from sending their child(ren) to Jewish pre-school, 8% of those in Amberley/Golf Manor/ Roselawn said "yes", 10% of those in Blue Ash/Kenwood/Montgomery and 30% of those in Loveland/Mason.
- Rockwern Academy, a K-8 community day school, had 417 students at its height in 2001; today, 180 are enrolled.
- The Cincinnati Hebrew Day School, a pre-K-8 Orthodox day school, currently has 186 students enrolled.

- Among those 5-17 year olds raised Jewish-only, 13% are reported to be in a fulltime Jewish day school.
- None of the children being raised Jewish-and-something else, no religion, undecided, etc. are reported enrolled in a Jewish day school.
- The percentage of those in various age cohorts who attended Jewish day school:
 - 35% – of those 20-29
 - 26% – of those 30-39
 - 18% – of those 40-49

Jewish Camping

- 37% of Cincinnati's Jewish children 5 to 17 are reported to have attended Jewish overnight camp. Respondents were not asked which camp the children attended, but popular Jewish overnight camps in the region include Camp Livingston, GUCI (Goldman Union Camp Institute), Wildbrook and Ramah.
- Of those who didn't attend overnight camp, 24% had household incomes under \$50,000 and 37% of them reported that cost had prohibited participation.
- Those respondents who had attended Jewish overnight camp as a child (where they grew up):
 - 28% – of those 20-29
 - 51% – of those 30-39
 - 42% – of those 40-49

Teen Education

- There are estimated to be 2,050 Jewish people of 13-17 living in Jewish households in Cincinnati.
- There are approximately 195 – 200 currently enrolled in Kulanu: The Cincinnati Reform Jewish High School and approximately 87 in Mercaz, the Conservative high school.

Adult Education

- Cincinnati has a Melton program but has never had a Wexner program.

Jewish Special Education

- As a pilot program, a special education consultant is available to work with all Cincinnati area supplementary religious schools. Also, the JCC has put together a new task-force on inclusion programming but currently does not have any programmatic offerings in place. Camp Chabad runs a summer camp that caters to the needs of campers with “special needs,” but their definition of “special needs” services is unclear.

Israel Engagement

- 69% of in-married families reported having traveled to Israel and 30% of inter-married families reported having traveled to Israel.
- Of those who reported that financial constraints prevented them from going to Israel:
 - 24% – of those 20-29

- 41% – of those 30-39
 - 45% – of those 40-49
- 52% of respondents to the Community Study have been to Israel as compared to 41% nationally (2000-1 NJPS):
 - 59% of those 20-29
 - 42% of those 30-39
 - 45% of those 40-49
- Percentages of those respondents who feel “very connected” to Israel:
 - 47% of those 20-29
 - 28% of those 30-39
 - 24% of those 40-49
- Percentages of those respondents who say “It’s very important to support Israel and Jews overseas”
 - 76% of those 20-29
 - 53% of those 30-39
 - 43% of those 40-49

MEMORANDUM

To: The Board of Trustees, The Jewish Foundation of Cincinnati

From: Rosov Consulting, LLC

Re: Foundation Grantmaking, 1995 – 2010, 100K+

Date: December 10, 2010

This memo provides information on the largest grants that the Foundation made between 1995 and 2010. We compiled this data using information supplied by Connie Hinitz.

Chart #1 lists the Foundation's largest grants (\$100,000 and over) made from 1995 to 2010.

Chart #2 provides totals of grants made to the largest grant recipients during this period. These totals include smaller grants that are not in the first chart.

Chart #1: Grants \$100,000 and Over, 1995 – 2010

Grantee - Project	Project Type	Year Approved	Amount
Jewish Community Center - new construction	Capital	2005	\$10 million
Jewish Hospital -per 1995 Joint Operating Agreement	Capital	1995	\$10 million
HUC - Klau Library renovation	Capital	2004	\$6.5 million
Jewish Federation - Israel Experience Grants	Program	1999	\$5.4 million
Jewish Cemeteries of Greater Cincinnati	General Operating	2008	\$4 million
Yavneh Day School/Rockwern Academy - remodel	Capital	1998	\$4 million

Grantee - Project	Project Type	Year Approved	Amount
Camp Livingston - remodel	Capital	2001	\$3.5 million
HUC -American Jewish Archives International Learning Center	Capital	2001	\$1.5 million
University of Cincinnati - Judaic Studies Chair	Endowment	1998	\$1.5 million
Jewish Hospital - linear accelerator for radiation department	Capital	2003	\$1.35 million
Beth Tevilla Mikveh Society	Capital	2009	\$1.2 million
Cincinnati Hebrew Day School -- remodel	Capital	Unknown	\$976,000
Jewish Hospital - MRI & electric archiving system	Capital	Unknown	\$800,000
Jewish Federation - economic crisis	General Operating	2009	\$750,000
Jewish Hospital - advanced technology ultrasound and new beds	Capital	2008	\$582,000
Jewish Hospital - purchase of medical office	Capital	Unknown	\$525,000
Jewish Hospital - surgery equipment	Capital	Unknown	\$500,000
Jewish Community Center - gifting of leasing rights at Rockdale Temple	Capital	2009	\$500,000
Halom House - relocation of group home	Capital	2006	\$375,000

Grantee - Project	Project Type	Year Approved	Amount
Jewish Community Center - remodel to relocate JFS/Big Brothers Big Sisters to JCC	Capital	2010	\$364,000
Jewish Federation - pass thru to reconstruct Western Galilee hospital	Capital	2007	\$346,000
Jewish Community Center - parking lot expansion	Capital	2010	\$341,000
American Jewish Committee - Lebanon War emergency grants	General Operating	2006	\$322,000
Jewish Hospital - surgical rooms	Capital	Unknown	\$300,000
American Friends of Magen David - Lebanon War blood testing kits	Capital	2003	\$300,000
Jewish Hospital - viewpoint guided image system	Capital	Unknown	\$199,000
Jewish Federation - remodeling at Rockwern reimbursement	Capital	Unknown	\$188,000
Jewish Hospital - bone densitometer	Capital	Unknown	\$175,000
Cedar Village - security	Capital	2008	\$135,000
Jewish Federation - community study	Program	2006	\$120,000

Grantee - Project	Project Type	Year Approved	Amount
Jewish Cemeteries of Greater Cincinnati - feasibility study	Program	Unknown	\$118,000
Center for Holocaust and Humanity - relocate and remodel	Capital	2010	\$114,000
University of Cincinnati - creation of College of Education Center of Jewish Education	Program	2006	\$100,000

Chart #2: Totals of All Grants Made to Largest Grant Recipients, 1995 – 2010

Jewish Hospital/Health Alliance of Cincinnati	\$14,447,500
Jewish Community Center	\$11,349,749
Hebrew Union College	\$8,553,000
Jewish Federation of Cincinnati	\$7,038,700
Yavneh Day School/Rockwern Academy	\$4,175,100
Jewish Cemeteries of Greater Cincinnati	\$4,118,000
Camp Livingston	\$3,598,107
University of Cincinnati Foundation	\$1,600,000
Beth Tevilla Mikveh Society	\$1,201,053
Cincinnati Hebrew Day School	\$1,016,695

MEMORANDUM

To: The Board of Trustees, The Jewish Foundation of Cincinnati
From: Rosov Consulting, LLC
Re: Philanthropic Approaches and Strategies
Date: December 10, 2010

At the Board retreat, we touched on the notion of grantmaker as “community change maker,” and provided a brief overview of venture, catalytic and strategic philanthropy. We also enumerated several grantmaking investment categories beyond capital and general operating.

Going forward, you will be deciding on the new “philanthropic persona” of the Foundation. This memo builds on the retreat learnings about philanthropic approaches and strategies to provide more in-depth understanding of some possible funding options and opportunities.

I. Traditional Philanthropy

The majority of funders – and particularly individuals and smaller family foundations – operate by responding to those who ask them for support. Giving for them is about deciding, first, which nonprofits or projects fit with their values and interests and, then, how much money to give each organization.

Moving beyond basic giving, somewhat larger funders generally target one or more narrowly defined causes and endeavor to effect a recognizable change in conditions by enhancing the work of the chosen organizations.

II. Beyond the Traditional Approach: Tactical v. Strategic Philanthropy

If traditional giving helps one person or one group at a time by providing funding for short- to medium-term needs, *tactical philanthropy* is an approach that positions *donors as social investors*. *Strategic philanthropy* goes a step further, positioning *funders as problem-solvers*.

The difference between the two approaches is subtle but important: A tactical philanthropist supports a portfolio of organizations that are effectively producing social impact in areas of concern to the funder. Tactical giving involves investing in great organizations that are solving big problems.

Strategic philanthropy aims to step back and look at the world from a 10,000-foot perspective: It is driven by a vision of the desirable society of the future, a self-perception as a community leader, a proactive approach to grantmaking and partnering and, often, a yearning to become or fund a laboratory that develops model solutions, new ways of thinking and new understandings for resolving societal problems. Strategic philanthropy is less about investing in organizations than about supporting social change through a variety of available vehicles -- only one of which grantmaking.

III. “New” Strategies: Venture v. Catalytic Philanthropy

Tactical and strategic approaches lend themselves to a variety of grantmaking strategies and tactics. As the foundation world has grown over the past fifteen years (between 1995 and 2010, the number of US foundations more than doubled), and the field and study of philanthropy has blossomed,

attention has been drawn to the most effective and innovative practices. Two of the “hottest” philanthropic strategies are described below.

Venture philanthropy is a strategy for philanthropic investing that is closely aligned with the *tactical approach* described above. Venture philanthropy is modeled on venture capitalism; it seeks to apply marketplace principles and techniques to non-profit organizations -- embracing free-market forces, discarding ineffectual plans and using metrics to measure program effectiveness. For good reason, the approach is also sometimes called “philanthrocapitalism.”

Venture philanthropists generally support nonprofits and social entrepreneurs that align with their social change priorities. They fund ground-breaking ideas and invest in the most effective existing organizations.

In the Jewish world, this funding strategy differs dramatically from the federation’s campaign allocation system which gives to established agencies and implements new projects only after much deliberation.

Joshua Venture Group, a national project funded by four major private Jewish foundations, embodies the new concept: It invests in “visionary leaders and groundbreaking ideas... [who] will play an important role in transforming our Jewish communities as they exist today.” Joshua Venture is in part modeled on *Echoing Green*, a well-known organization outside the Jewish world, which funds two-year fellowships that provide start-up funding and training to launch new organizations proposing to address social concerns.

Another example of venture philanthropy is *Natan*, an organization created by and for young philanthropists who pool funds and allocate to “innovative organizations that are building the new vision for the Jewish people and the State of Israel.”

Not to be left behind, the *Jewish Federations of North America* has also recently begun to tout the benefits of the venture philanthropy model for addressing issues beyond basic needs, saying that, unlike the federations’ annual campaigns which raises funds to sustain core services, the new model “strives to make investments in innovative and compelling initiatives with the potential to generation significant social returns.” The JFNA pilot initiative has been the Social Venture Fund for Jewish-Arab Equality & Shared Society, a group of individuals and foundations that are supporting high-impact projects in this area of shared interest. Several local federations also have established venture funds, including Washington, D.C., Denver and Los Angeles.

A final example of venture philanthropy is *The Robinhood Foundation* which rose to fame by funding what it determined were the most effective poverty-fighting organizations in its quest to alleviating poverty in New York City. It was described by *Fortune Magazine* (September 18, 2006) as “one of the most innovative and influential philanthropic organizations of our time.”

Catalytic Philanthropy takes the *strategic philanthropic approach* to giving. Catalytic funding appeals to those funders with an ambition to “change the world” – or some aspect of it – and who wish to take responsibility for achieving the systemic results they seek. This type of philanthropy typically engages others in a compelling campaign, empowering stakeholders and creating conditions for collaboration and then using learnings to improve the effectiveness of the project and to influence others’ behavior.

Mark Kramer (FSG), who is credited with coining the term “catalytic philanthropy,” tells the following story of how one philanthropist came to develop a catalytic campaign:

Philanthropist Thomas Siebel was concerned about the rampant use of methamphetamine in Montana. His first action was to commission research: he learned that typically first-time users were teenagers who were unaware of its risks. He then created the *Meth Project* to change teenage perceptions and did so by bringing together experts and hiring a San Francisco ad agency to develop a campaign that aimed to reach 80% of Montana teens with at least three world-class ads every week. He also convinced other funders to join him and encouraged schools and community organizations to sponsor anti-meth events. Finally, he lobbied Congress to combat the problem. In other words, he used all the tools available and encouraged cross-sector collaboration to catalyze social change.

Another example is from Cincinnati itself: Many of you have probably heard of *Strive*, a nonprofit founded in 2006 by Nancy Zimpher, then president of University of Cincinnati, to address the need for better student preparation. Strive focused on data-driven decision-making, facilitating and sustaining coordinated action and advocating for funding what they determine works. The organization worked with more than 300 organizations to focus on improving the entire system and was cited nationally for managing to accomplish in an urban school system what other major foundations and nonprofits had failed to achieve: “Strive, both the organization and the process it helps facilitate, is an example of collective impact, the commitment of a group of important actors from different sectors to a common agenda for solving a specific social problem.” (*Stanford Social Innovation Review*, Winter 2011)

There are a number of examples of the catalytic strategy in the Jewish world: One is the recently established *Repair the World*, an organization that aims to “make service a defining part of American Jewish life,” and does that by grantmaking, connecting individuals to service opportunities, and supporting and sharing best practices. Another is *Synagogue 3000*, which seeks to “make synagogues compelling moral and spiritual centers” by supporting and showcasing creative synagogues and advocating in communities for changes in the prevailing models.

IV. Possible Tactics for Community Changemaking

In a sense, catalytic philanthropy is an extreme form of strategic philanthropy and as such it serves to illustrate the difference between investing in organizations and in full-blown change.

And yet a funder can take a strategic approach -- be a “community changemaker” -- even without initiating a huge single-focused initiative as long as the funder is determined to take steps to help their communities take broader, bolder and more comprehensive steps.

Community changemakers view themselves as community leaders, and thus go beyond traditional grantmaking to contribute ideas and information, foster strategic connections, expand resources devoted to change, leverage systems of change, and promote high performance and effective practice through evaluation.

Some of the prevailing tactics used to achieve change include –

- *Undertake Research:* Research allows a foundation to gain deeper understanding of the issues it wishes to address and to acquire “strong peripheral vision,” i.e. a sense of the funder’s potential place and role.
- *Collect input:* Hearing from stakeholders allows a foundation to access new ideas, get buy-in and engage and build public legitimacy.
- *Foster strategic connections:* Pursuing like-minded people and organizations and developing partnerships has the potential to enhance the influence of a philanthropic effort.
- *Take risks and learn from failure:* Having the courage to experiment with new approaches and underwriting risk-taking by effective organizations – and acknowledging the possibility of failure -- historically has produced some of the most innovative practices.
- *Share learnings:* Conveying research, new ideas, lessons learned and anything else of relevance advances the cause and creates trust and a sense of partnership.
- *Leverage resources:* If a foundation can use its resources as a lever to catalyze much larger streams of funding from sources outside philanthropy (both private and public funds), entire new worlds of possibility open up – including, possibly, market stimulation, influencing of public opinion and policy and activating new players and yet other resources.
- *Convene:* Bringing people and organizations together is a way to accomplish many of the other goals stated above; in addition, face-to-face exchange is a tactic that allows for an old-world type of interaction and networking not easily replicated by new technologies.
- *Evaluate:* Effective measurement fully contextualized provides invaluable information for looking at what has been done, and what needs to be done (see Section VI below).

V. Funding Types

Funding is a complex job: Not only does a foundation need to consider the approach, strategy and tactics a foundation wishes to assume but also the form that individual grants will take. To the end of partnering, convening, researching, sharing, etc., the funder has to structure the grant itself. The following list defines some of the most common types of funding:

Advocacy: Encouraging public entities to become aligned around a funder’s priorities. Although foundations may not engage in partisan politics, there are more options for advocacy by private philanthropy than most people know.

Capital Grants: Providing funding to build, renovate, reconstruct, expand buildings and to supply materials and equipment that serve to support a nonprofit’s mission.

Challenge Grants: Funds dispersed by a funder upon completion of a defined action or result.

Matching Grants: Grants that require funds to be raised or acquired from other sources, following a stated “matching factor.” For example a \$1,000 challenge grant with a 3:1 match would require the recipient to raise \$3,000 before receiving the \$1,000 grant.

Demonstration Grants: Grants supporting the development, implementation and evaluation of a particular model that fulfills the funder’s goals and that, if applied more broadly, will address a defined issue on a larger scale.

General Operating Support/Unrestricted Funding: Funds that support an organization’s operations as a whole, and thus its overall mission as defined by the organization itself, rather than particular projects.

Seed Money: Funding to start an entity so that it has enough funds to sustain itself for a period of development until it can raise funds for itself. These grants are typically used to pay for market research and program development.

V. Role of Evaluation in “Leading Change”

Evaluation is the systematic information gathering and research about grantmaker-supported activities that informs learning and drives improvement.

Increasingly, evaluation is viewed by foundations and their grantees as more than a requirement; it is seen as a core learning practice involving a continuous cycle of reflecting and improving.

Looking through the prism of learning offers a different view of evaluation. Rather than an accountability exercise, it becomes a powerful tool for improvement. And, rather than a function “outside” an organization, evaluation is part of the job of every staff and board member. It enhances the capacity of grantmakers and their grantees — as well as governments and communities — to reflect on, understand and solve problems more effectively.

More and more, funders with a focus on a particular issue or community are committed to the task of continuous improvement, fine-tuning their strategies and activities in response to results on the ground. This is how the practice of evaluation becomes part of a foundation’s contribution to the community in which it functions.

VI. Resources

We suggest the following organizations as resources on philanthropy. We have also listed some of the upcoming conferences and training sessions, as well as general offerings, which may be appropriate for Foundation staff and trustees.

1. **Jewish Funders Network** – <http://www.jfunders.org/>
 - National conference: March 27 – 29, 2011 in Philadelphia
 - Foundation professionals program

2. ***Council on Foundations*** – <http://www.cof.org/>
 - Essential Skills & Strategies (ESS) for Grantmakers series: Next two are February 1 -2 , 2011 in Orlando, Florida; and October 12 – 13, 2011 in Arlington, Virginia.
3. ***Grantmakers for Effective Organizations*** (GEO) – <http://www.geofunders.org/home.aspx>
 - The Learning Conference: June 6 – 7, 2011 in Baltimore, Maryland
 - GEO publishes reports about giving trends and practices from the field of philanthropy.
4. ***The Center for Effective Philanthropy*** (CEP) -- <http://www.effectivephilanthropy.org/index.php>
 - National conference, “Better Philanthropy: From Data to Impact:” May 9 – 11, 2011 in Boston, Massachusetts
 - CEP publishes helpful reports centered on foundation assessment, strategy, governance and foundation-grantee relations.
5. ***Ohio Grantmakers Forum***
 - Annual conference: October 24 – 26, 2011 in Columbus, Ohio
 - Offers free common grant forms

KEY INFORMANT INTERVIEW PROTOCOL

INTERVIEWER NAME: _____

INTERVIEW NUMBER: _____

DATE AND TIME INTERVIEWED: _____

CHECK ONE: [] IN-PERSON []
PHONE

<p>CONFIDENTIAL</p> <p>Name: Title / role: Organization:</p> <p>IN CASE OF DYAD:</p> <p>Name: Title / role: Organization:</p>
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NOTE: THIS PROTOCOL IS ONLY A GUIDELINE. RESEARCHERS WILL FOLLOW THE INTERVIEWEE'S PACE AND DIRECTION, AND MAY DEPART FROM THIS GUIDELINE IF A "RICH" SUBJECT ARISES.

INTERVIEW STARTS HERE



I. INTRO (2 min.)

- a. Researcher introduces self. I am with Rosov Consulting; we have been engaged by the Jewish Foundation of Cincinnati to conduct interviews of key stakeholders in your community.
- b. Broad brief overview of project –
 - i. Are you aware that the Foundation has started a new strategic planning process?
 - ii. As a result of the sale of the Jewish Hospital, the Foundation will be in a position to significantly increase its grant making.
 - iii. So gathering the views of community organizations and people like you is one of the inputs the Foundation will use in its planning.
- c. Emphasize looking to envision future, big picture for Jewish community of Cincinnati.
 - i. [] we are coming to you because of your / your organization's broad view on the community.
 - ii. During this interview, you may want to speak either as an individual, or on behalf of your organization. Both are fine, just state which view you're presenting.
- d. Confirm interview is confidential; comments won't be attributed – looking for your candid perceptions and views.

II. WARM UP (try for no more than 5 min.)

- a. Please describe your organization's relationship and involvement with the Jewish Foundation of Cincinnati (if any)

III. THE CINCINNATI JEWISH COMMUNITY TODAY (5 min.)

- a. We'd like to get your sense of the kind of community this is. How do you think a newcomer to Cincinnati would experience the Jewish community?
- b. [PROBE:] What if it were:
 - i. A single young person?
 - ii. A new family?
 - iii. A professional who recently was transferred here?
- c. Does it have any particular kind of special or unique traits?
- d. What are some things you think are positive or remarkable about this Jewish community?

IV. CHALLENGES (10 min.)

- a. Thinking about Jewish life here in Cincinnati, what do you think are the major challenges facing the community as a whole?
- b. [PROBE – develop a list:] What else?
- c. Of these challenges, from your perspective, which are the three you consider most important?
- d. Why do you think these particular challenges are the most important?
- e. Supposing these challenges could be addressed successfully at some point in the distant future, describe what specific outcomes you would like to see [FOR EACH CHALLENGE LISTED ABOVE]:
- f. What do you see as some of the most positive, exciting, encouraging things happening in the Jewish community today?

V. FUTURE VISION (15 min.)

- a. Now, I'd like you to imagine yourself in Cincinnati 20 years from now. The Jewish community is celebrating the fact that it has succeeded in realizing every major goal set in the past. It is the ideal Jewish community for Cincinnati, from your point of view. Never mind how we got there... describe it to us!

[PROBE:]

- b. Describe the signs of a successful community that one might observe.

- c. What else?
- d. What has changed?
- e. What has stayed the same?
- f. Can you create a mini-story that shows how well things are going? What do you see happening in what kinds of venues?
- g. Would any particular segments of the Jewish population be especially affected?

VI. IDEAL ROLES FOR FOUNDATION ET AL. (10 min.)

- a. What do you see as the ideal role for the Jewish **Foundation** of Cincinnati to play in this community?

Please explain why you see it that way.

- b. What do you see as the ideal role for the Jewish **Federation** of Cincinnati to play in this community?

Please explain.

- c. In the longer term, what is your sense of how these two organizations can collaborate to get the best results for the Jewish community?
- d. What would be some ideal ways for them to interact with other major Jewish organizations?

VI. END

Is there anything else you'd like to add about these topics?

Thank you for your time and your thoughts - they are very much appreciated.

MEMORANDUM

To: Brian Jaffee, Executive Director, The Jewish Foundation of Cincinnati

From: Wendy Rosov, Ph.D., Principal, Rosov Consulting, LLC
and Rosov Consulting Team Member Sarai Brachman Shoup

Re: Miscellaneous Research Questions

Date: February 1, 2011

You requested information about a number of unrelated issues that came up at the second Trustee Planning meeting or at the January 11 Community Planning Meeting. This memo summarizes our cursory review of each of these issues. Should the JFOC wish to consider pursuing any of them, we recommend undertaking more in depth research during subsequent phases of the consultancy. Where relevant, we have indicated this.

1. **How community-based foundations have approached relationships with individual congregations**

Relevant examples:

- **Helping organizations secure their future through matching grants, incentives and training.**
 - The Jewish Community Foundation of San Diego provides all organizations that participate in their endowment leadership institute, including synagogues, with a three-year, \$36,000 grant, to be used however the organization wants. The Community Foundation's intent is to incentivize individual agencies and synagogues to take planning for the future seriously.
 - The San Francisco Jewish Federation has recently initiated a similar training program focused on legacy, fundraising and memberships, and is also planning to entice participants with incentive grants.
 - These two programs were based on a community-wide endowment challenge model spearheaded in Denver by the Jewish community and another, yet larger, one undertaken in Detroit by the Community Foundation for Southeastern Michigan, which, over a three-year period, offered one dollar for every three endowment dollars raised by qualifying nonprofits. The Community Foundation worked closely with each of the 38 participating organizations, providing endowment training and helping them set and meet targets.

- **Funding innovation.** On January 21, 2011, the Rose Community Foundation in Denver announced nearly \$200,000 in grants to seven local synagogues that a) promote new Jewish connections and participation; b) create new ways to deliver meaning, purpose, spirituality and welcoming; or c) transcend traditional boundaries, both spiritual and geographic. This is the first time, since the Foundation was established in 1995, that it made grants to individual congregations. Funded projects include the following:
 - \$55,000 to create Sunburst Shabbat, monthly Friday night gatherings for families featuring musical services and informal dinners.
 - \$24,220 to support Sensational! Judaism: Engaging the Five Senses, a series of seven experiential learning programs around Jewish holidays.

- \$19,000 to train teen and adult congregants as connectors who will lead programming for *havurot* (small fellowship groups), the congregation and the community at large.
- \$58,900 to create JConnect, offering Jews ages 25 to 39 spiritual, cultural, educational and social experiences.
- \$7,080 to create six "Jewish Survival Guide" workshops about Jewish lifecycle events for Jews in their 20s and 30s.
- \$21,000 to integrate special needs students and their families into the religious school.

2. Voucher-type approaches to involvement in Jewish communal life

As far as we know, no Jewish community has tried a community-wide voucher program – despite the fact that affordability has been on the radar of Jewish foundations and federation for many years. In fact, in December 2010, the Research Department of Jewish Federations of North America, issued a memo on the topic in response to concerns expressed by the “Tarrytown Group,” a convening of the nation’s largest Jewish federations and foundations. We have requested a copy of this memo, and will provide it to you if we think the information therein is valuable to your planning.

Many “voucher”-style programs have been tried in the day school world. The AVICHAH Foundation ran a two-year pilot in 1997 -99 in Atlanta and Cleveland to test the theory that scholarship funds, carefully structured and targeted, could attract students who wouldn’t otherwise select day school. Brandeis evaluated it, and although AVICHAH was excited by the results (200 new students entered the system), the effort was never taken to scale.

Although not a voucher program, the Bureau of Jewish Education of LA runs a “Concierge for Jewish Education” service. This no-cost-to-client program helps anyone who asks find and connect formal and informal Jewish educational programs that fit his/her needs.

Developing a plan to tackle community-wide affordability will likely require research into how various communities think about making Jewish preschool, day school, day and overnight camp, JCC membership, and synagogue membership affordable – even if it is on a piecemeal, as opposed to universal voucher, basis. Research would include a financial analysis, definition of roles of partner agencies and the JFOC, and would likely recommend a pilot program carefully structured so as to be able to assess outcomes and ensure impact before expanding it to the community at large.

3. Has anyone tried “geographical manipulation” -- recreating the “shtetl”?

The people we asked about this were generally amused, saying that the challenge most communities discuss is how to do the opposite: provide new services to the new farther-out suburbs where Jews are opting to live. Montreal and Vancouver were mentioned as cities that have grappled with this issue.

Someone wondered if, instead of trying to encourage movement to the older part of town, you could encourage and develop “new shtetls” in one or more particular suburbs to which Jews have gravitated farther from the city.

A 1993 report by renowned Jewish sociologist Daniel Elazar titled “The New Geo-Demographics of American Jewry” argued that the new patterns of settlement of the Jewish community were necessitating revolutionary changes in the way that Jewish communal organizations functioned – and that the shifts were irreversible.

Overall, then, the guidance we received would lead us to advise against pursuing “geo-demographic” manipulation of the type you suggest, although there might well be other opportunities to recreate a close-knit Jewish communal culture in Cincinnati. Looking into what other communities are doing to enable this sort of old-new feeling in the community is indeed a viable project, and might turn up ways to make the JCC and other local institutions more vibrant and attractive places as well.

4. **Have any Jewish communities established “centers for excellence” to aid and support their local communal institutions?**

We didn’t turn up anything quite like the model you envision: one that provides the Jewish community with a team of experts in various areas, including strategic planning, human resources, finance, marketing, organizational culture, community engagement, intra-agency collaboration, board development, and professional development.

Just as you know that the Cincinnati VA Hospital works with a national center of this kind, we know that individual Jewish day schools are accessing services from places like JESNA, PEJE, RAVSAK and PARDeS. In addition, there are examples of collaborative hires for specific tasks: a number of day schools in LA have embarked on a service-sharing arrangement, and in Bergen City, New Jersey, Jewish organizations can take part in a joint purchasing program based at the Federation.

Even if there aren’t good examples of what you would like to do in the Jewish world, there may well be any number of relevant analogues outside the Jewish world. And perhaps, in this day and age, we could find and pilot a solution that is virtual – which would allow local agencies to tap into expertise they would not otherwise be able to access.

5. **When Divestment From a Jewish Communal Institution is warranted.**

We spoke with Dr. Steven Windmueller, a professor at HUC in Jewish Communal Service (and dean of HUC’s LA campus) about this topic. Dr. Windmueller provided a verbal update to his 1997 article entitled “The Survival and Success of Jewish Institutions: Assessing Organizational and Management Patterns,” saying that the current measures of a high-functioning institution in the Jewish community should be the following:

- (1) **Quality of Lay and Professional Leadership:** An institution needs to be adept at recruiting and replacing its “bench” of leadership.
- (2) **Courage to Engage in Serious Strategic Planning:** In tougher times, this means asking hard questions, such as “What if we didn’t exist?”
- (3) **Strength of Fundraising Campaigns:** Although the last several years have been difficult ones, an organization must be able to raise funds to sustain its programs and operational and promotional expenses.
- (4) **Responsiveness to Crisis:** A healthy organization took careful stock of itself during the last several years and made operational and programmatic changes, at the same time paying close attention to the “human” side of the organization and demonstrating a certain responsibility to its staff and the people it serves.

These are in addition to the “six basic measures” for evaluating the health of Jewish communal institutions that Dr. Windmueller identified in his 1997 paper:

- (1) **Core Numbers:** A certain mass of members or clients to maintain their status.
- (2) **Cause(s):** A clear mandate.

- (3) **Credibility:** A historic record of performance and achievement.
- (4) **Competition Factor:** How well the organization competes with other communal activities dedicated to similar purposes.
- (5) **Capability:** Ability to attract and involve adequate leadership.
- (6) **Cash Capacity:** The ability to raise funds to support activities.

6. **What Staffing Configurations and Ratio of Administrative to Grantmaking Budgets are Typical of Foundations With Assets the Size of the JFOC?**

A 2006 report from The Urban Institute and The Foundation Center entitled “What Drives Foundation Expenses and Compensation” provides some answers, which, although outdated (an updated report is due out in May 2011), serves as a helpful guide.

Relevant Facts & Figures:

- A median of 8% of qualifying distributions of the 10,000 largest independent foundations were used for charitable administrative expenses. The most common expense ratio for staffed foundations was 5%, and most independent foundations had expense-to-qualifying distributions ratios of under 10%. Paid staff has the greatest affect on operation costs. *One might infer from these figures that, for the JFOC, an appropriate range for administrative expenses would be \$625,000 - \$1.25 million.*

The report provides the following caveat to all of the statistical information it offers: “Foundations differ significantly in their structures, resources, and operating characteristics and these differences significantly affect their expense levels. Even among foundations of the same type, difference in assets, giving levels, work styles, geographic reach and program type vary dramatically and account for wide variations in expense and compensation patterns” (p. 48) *This is to say that the “right” administrative budget will depend strongly on how and what the JFOC chooses to fund. The “philanthropic persona” and role(s) that the Foundation chooses to play vis-à-vis accomplishing its goals will have substantial implications for administrative budget.*

- Foundation Center reports appear reluctant to list typical staffing sizes and configurations, citing instead the need to consider foundation activity and structure. As the JFOC fine-tunes its strategic direction, additional research in this area will be helpful, and could include, among other things, gleaning information from the Foundation Center’s database (which requires a subscription) and working with the Jewish Funders Network, the Center for Effective Philanthropy, and others to identify typical staffing structures for foundations with similar interests and assets.