

SOME STRATEGIES BEGINNING TO PAY OFF
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LIKE EARLY GLIMPSES OF THE DAWN
YEAR FOUR REPORT ON THE CONCLUDING YEARS
OF THE AVI CHAI FOUNDATION

BY JOEL L. FLEISHMAN

PROFESSOR OF LAW AND PUBLIC POLICY STUDIES

DUKE UNIVERSITY

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CENTER FOR STRATEGIC PHILANTHROPY
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DUKE UNIVERSITY

FOREWORD

This report is based on a thorough review of Board minutes, internal documents, and published reports of The AVI CHAI Foundation, and on a series of interviews conducted in the United States and Israel between May and August 2012. The roughly 60 interviews included every AVI CHAI Trustee, a sampling of grantees and funding partners in North America and Israel, and nearly all staff members in the United States, Israel, and the former Soviet Union. After review and comment by senior staff members, the initial findings were presented to the Trustees in October 2012, and their comments have been incorporated into this final draft, which was completed in November 2012.

Now, this is not the end. It is not even the beginning of the end. But it is, perhaps, the end of the beginning.

— Winston Churchill, addressing the House of Commons, November 1942

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BACKGROUND

This is the fourth in a series of reports on how The AVI CHAI Foundation goes about putting its full endowment to use and completing its grantmaking by the end of this decade. The Foundation was established in 1984 by financier Zalman Chaim Bernstein (z"l)¹, with the mission of strengthening Judaism, Jewish literacy, and Jewish tradition; of sustaining, enlarging, and enriching Jewish commitment to the State of Israel; and of promoting mutual understanding between Jews of different religious backgrounds. AVI CHAI makes grants in three regions: North America, Israel, and the former Soviet Union (FSU).

In 2005, following the strongly implied wishes of its donor, the Foundation's Board of Directors decided that it would expend its full endowment and cease operations within 15 years. These reports describe the process by which AVI CHAI plans and carries out its grantmaking so as to achieve significant, lasting objectives in the time remaining and leave its grantees stronger and more fully equipped to carry on the parts of their mission that the Foundation has

supported. Like its three predecessors, this account is based on interviews with every member of the Board and almost all staff, and with a wide selection of grantees and collaborating funders.

Although the sections that follow describe, in broad strokes, the Foundation's strategic direction in each of its three geographic regions, this report does not attempt to catalogue all the important grantmaking undertaken in the past year. It focuses, instead, on the extent to which particular initiatives are guided by, the result of, or especially influenced by the institution's limited lifespan, and how the various lines of grantmaking contribute to the pursuit of an orderly, productive conclusion.

It is important to note that AVI CHAI determined, at the beginning of its spend-down process, that the choice of a limited lifetime would not mean that its energies would be devoted solely to winding down current activity. In the belief that good grantmaking depends partly on an atmosphere of continued exploration and innovation, the Foundation has reserved some of its resources for new initiatives in the remaining years. Virtually all of these initiatives have been undertaken in partnership with other funders who participate in their shaping and

¹ A traditional abbreviation for the Hebrew *zichrono livracha*: "may his memory be a blessing."

management, in the hope that the co-funders may be willing to sustain some or all of them after AVI CHAI has closed. These reports devote specific attention to the development and pursuit of this new work and to the cultivation of funding partners, because they constitute the most concrete reminder that, for AVI CHAI, the choice of a finite lifespan is as much a commitment to imagination and invention as to responsible conclusion.

EXECUTIVE SUMMARY

The AVI CHAI Foundation pursues its mission in slightly different ways in the three regions of the world where it operates. In Israel, the Foundation concentrates on fostering Jewish learning, culture, debate, community, and leadership, in part by helping to fuel a movement widely known as Jewish Renewal. In North America, it seeks to build an energizing nucleus of Jewish young people to lead the next generation intellectually, spiritually, and communally. It therefore focuses on Jewish day school education and overnight summer camping. In the former Soviet Union, its emphasis is on engaging unaffiliated Jews and revitalizing Jewish life, education, and culture after decades of Soviet-era suppression.

All of these goals, regardless of their different settings, will take many more years to achieve than are left in AVI CHAI's limited life. Consequently, two critical challenges for the Foundation in the eight years before it closes will be (a) to identify and work in partnership with other funders, both public and private, to develop and support key elements of its program, and (b) to strengthen essential grantees so that they are better able to raise other support and appeal to a new generation of donors.

In each of the three regions, AVI CHAI's approach to these challenges has been shaped partly by the different prospects for recruiting long-term funders to carry on after it closes. The breadth and maturity of philanthropy in the United States, for example, provides rich opportunity for funding partnerships,

but it is unmatched in either of the other two regions. The commitment of the State of Israel to Jewish communal life is likewise unparalleled in the other locations, and therefore the hope of expanded government support for projects of AVI CHAI is considerably greater there. The increase in wealth, entrepreneurship, and philanthropy in the former Soviet Union is evolving very quickly as young market economies mature. This region therefore offers a distinctive opportunity to work with emerging philanthropists — including those whose own Jewish identity is still being formed — and to widen opportunities for Jewish programs and organizations in an increasingly fertile environment.

Even within each region, strategies for fortifying and preparing current grantees for a post-AVI CHAI future differ according to the type of work involved. In North America, for instance, one central objective has been to strengthen Jewish day schools by helping them to become more affordable and viable, training school administrators and teachers, developing curricular materials on Hebrew language and Jewish studies, creating new models of using information technology and the Internet in instruction, and facilitating cost reduction experiments through “blended learning” (in-person plus online) and shared services provision. In these particular areas of Jewish education, AVI CHAI has been the dominant, and sometimes the only, funder.

Consequently, the effort to recruit new donors will call for opening channels of conversation with people who may as yet be only marginally involved in the field. Because most funding for Jewish day schools is local, partnering with other funders on national improvements to day school education means fundamentally altering the scale on which most prospective funders work. By contrast, in the Foundation's other main area of activity in North America, overnight Jewish camping, there are many active funders. Not all of them share AVI CHAI's particular interests and priorities, but engaging them in a discussion about joint grantmaking in this field is considerably easier.

In Israel, some areas of work will be more likely to draw longer-term sustenance from government than others. Yet here, philanthropy is in its infancy. There are few endowed Israeli foundations; Israeli citizens do not enjoy anything comparable to the tax incentives for charitable giving available in the United States, and the level of Israeli giving for the support of nonprofits of any kind, with the exception of Orthodox and ultra-Orthodox religious schools, is low. So in this case, AVI CHAI's hope of securing a future for its projects and grantees calls for cultivating not only the fundraising capacity of the individual organizations and the commitment of their direct contributors, but more broadly, the culture of philanthropy for Jewish Renewal in Israel. And on a separate track, it requires redoubled effort to reach out to generous North Americans who have a strong interest in Jewish renewal in Israel.

In the former Soviet Union, yet another strategy is required, a hybrid of those in North America and Israel. From its very beginning 11 years ago, this program has placed a premium on recruiting fellow donors from a diverse mix of sources: international Jewish organizations working within the FSU, Israeli organizations seeking to benefit Russian Jews and Russian-speaking Israelis, Russian educational institutions, and U.S. philanthropists and foundations especially interested in Russian Jewry, as well as, in recent years, a growing number of wealthy Russian donors. Different initiatives appeal to different sub-sets of these possible partners. As in the other two regions, a strategy for strengthening and sustaining the Foundation's grantees therefore has to be custom-tailored to each field and area of interest.

Beyond a substantive commitment to Jewish life and learning, which the programs in all three regions share, another common element is their determination to find ways of helping grantees carry on after the Foundation has closed. The desire for funding partners, the goal of strengthening grantees' fundraising and management capabilities, and the attempts to spread the word about the Foundation's projects and causes are all part of this effort. AVI

CHAI's staff and Board have sometimes struggled, in earlier years, to find the right mix of approaches to the challenge of long-term sustainability for grantees in each of its fields and locations. But by virtually all accounts, the past year has seen a new clarity and vigor to these efforts, and at least the beginnings (often more than that) of tangible results flowing from them. One reason for this has been an intensifying awareness, among both staff and Trustees, that the Foundation has entered its final decade and that it will likely take several years to cultivate new funders and build the organizational strength of key grantees.

As one Board member put it, the "laser focus" on wrapping up the Foundation's work in the time remaining "is becoming more intense and tighter all the time, which is a good thing. Everybody is focused on doing the best we can with what we have left, both in terms of capital and time. There's an increasingly heightened insensitivity and intolerance towards distractions." Added another: "To my surprise, and I think to the surprise of many of us, some of the programs and institutions we've supported have managed to find alternative funding to replace AVI CHAI's funding, and that's been gratifying to see. That's a very healthy development. On the other hand, other institutions are struggling, and that's an unhappy development. But we knew there would be some of that."

A staff member suggests that in the course of seeking new funding partners and plans for long-term sustainability, the Foundation has "remade our image, in terms of our will and ability to collaborate and to listen to the field. By collaborate I mean with other funders, our grantees and the field. ... I think there's a collaborative relationship with these institutions, and the people we work with appreciate that collaborative stance."

PART I: THE PROGRAM IN ISRAEL

"AVI CHAI's philanthropy in Israel concentrated on a few key projects," Chairman Arthur Fried pointed

out in a June 2012 interview, “and represented in too many of them the vast bulk of their support. It leads to difficulty. There are no guarantees that our support will be replaced, although in every instance we’re committed to a clear reduction over the next six years in our support to their organizations. In most of them we’re endeavoring to assist them in standing alone when we’re finished.”

As in other parts of the world, “replacing” AVI CHAI funding in Israel is not simply a matter of lining up new funders to take over AVI CHAI’s past work. It is unlikely, for starters, that many donors would be willing merely to take up another foundation’s priorities, without having some role in shaping and focusing them. But in Israel, there are not many private funders to begin with, so the number whose interests could mesh with AVI CHAI’s will necessarily not be large. Furthermore, many Israeli nonprofit organizations have only limited experience in the kind of large-scale private fundraising they will need when their AVI CHAI support has ended. The challenge, therefore, lies both in finding additional funders who could work as partners alongside AVI CHAI, sharing in the planning for the coming years, and also in preparing grantees to become more effective and creative fund-raisers.

“If you look at the principal programs where we’ve already significantly reduced our funding,” Mr. Fried observed, “they are all standing. They are all operating — in some cases flourishing, and in other cases struggling — but there are clear signs that these organizations have the ability, if they can connect with sources of funding, to survive long after the spend-down of AVI CHAI.”

The Foundation has sought to create a clear, well-planned trajectory of grant reductions and exits over the next several years. The Board has approved budgets for the Israel program through 2014, and the program staff has developed tentative budgets all the way through the final year of grantmaking in 2019. Exit grants have been approved for 14 projects. Two of these grants began in 2008 and provided for a

four-year wind-down. In 2009, following the market crash, exit grants of shorter duration, usually one more year of funding at half the then-current grant level, were made to ten more projects.

In 2011, final grants for three more projects were approved, with two of them commencing in 2012 and the remaining one in 2013. These more recent grants are based on a new policy of providing an amount equivalent to 24 to 36 months of funding, which can be spread out over a longer period, in order to ease the fiscal impact of AVI CHAI’s exit. Taken together, these steps are now freeing up both time and resources to pursue issues and priorities that will form the core of the program in the remaining years.

Looking ahead: Key facets of the program

One focus of AVI CHAI’s philanthropy in Israel has been advancing a movement often referred to as Israeli Jewish Renewal. As described by Israel Executive Director Eli Silver, the field consists of “open *batei midrash* [literally ‘houses of learning,’ centers for the study of Jewish religious and cultural heritage]; programs of Jewish-Zionist studies for schools; pluralistic Jewish community initiatives; religious-secular programs of study and living; and more. ... [The field] engages individuals in Jewish study, celebration and experience; utilizes a range of texts, from classical to modern; views diversity, questioning, and debate as central values; and seeks to strengthen the Jewish and democratic foundations of the State of Israel.”²

AVI CHAI’s main focus for the remaining years of the program consists of:

- fostering Israeli Jewish communities;
- promoting mutual understanding and responsibility;
- inspiring Jewish social change agents;
- promoting Jewish literacy and values in state schools; and

² Eli Silver, “Developing the Field of Israeli Jewish Renewal,” Background Memorandum to the AVI CHAI Board of Trustees, May 2012, p. 1, footnote 1.

- creating and disseminating Israeli Jewish culture, with special attention directed to building the capacity, scope, and durability of Beit AVI CHAI, a new educational and cultural center that has become a cornerstone of the Israel program.

In all of these areas, the staff has begun to plan the final stages of work through 2019, identifying the most important initiatives for the time remaining, planning a strategy that fits the planned end-dates, and reserving the funds necessary to implement them — subject to attracting matching support from other sources.

The program has devoted particular attention in the past year to assessing current efforts at promoting Jewish studies and Jewish-Israeli identity in state schools, in an attempt to determine which of these offer the greatest promise of success within the Foundation's remaining years. The assessment process involved extensive interviews with educators and policymakers, an examination of evaluations and data on Jewish studies in the school system, and a review of policy statements from the Ministry of Education. The exercise led the Foundation to decide on two new strategic initiatives: one to wage a public campaign in support of Jewish education in the state schools, and the other to develop a "significant program of Jewish professional development" in Jewish education for the elementary schools. As with any new initiative, both depend on cooperation from organizational, governmental, and funding partners, which the staff and Board have now begun to seek.

Meanwhile, existing initiatives in state schools will continue to receive support in the coming year, while program staff in Israel explore the prospects for sustaining them after AVI CHAI is gone. Strategic evaluations for some of these initiatives are under way; others have received their final grant commitments. Various online services will make educational materials available electronically to more schools.

Beit AVI CHAI

In February 2007, AVI CHAI opened its signature cultural and educational center in the heart of Jerusalem, called Beit AVI CHAI. The Foundation has long planned, at the end of its grantmaking, to leave a residual gift of at least \$120 million as an endowment for Beit AVI CHAI, with the hope that a larger amount might be available by that time. But that hope depends significantly on the performance of the Foundation's own endowment portfolio, a prospect that has grown more uncertain after the market crash of 2008 and the relatively slow recovery that followed.

Yet in the meantime, Beit AVI CHAI has met with such success in drawing audiences and public attention to its growing menu of cultural programming that the cost of merely continuing its current level of activity, adjusting only for inflation, is expected to reach close to \$7 million a year by 2020. That is considerably more than the planned endowment would be likely to furnish, and it does not allow for new initiatives. Consequently, the Foundation has begun working closely with Beit AVI CHAI to build a capacity to attract additional support from individual donors, foundations (both inside and outside of Israel), other cultural and educational institutions, the Israeli government, and municipalities outside of Jerusalem. Accordingly, a new staff position for resource development was created in 2012.

But fundraising on that scale will also require a board of trustees for Beit AVI CHAI composed of people with the ability to oversee — and participate in — an ongoing, multimillion-dollar resource-development campaign. The board will need members with well-established connections to potential funders and a willingness to play the role of energetic fund-seekers. That is not a customary role for governing board members in most Israeli nonprofits, and it may well take some time and adjustment for even the best-suited potential trustees to rise to the challenge.

Greater communication and coordination between the Foundation's grantmaking staff and the operating staff of Beit AVI CHAI will also be essential in preparing the institution for a stable, well-funded

independence after 2020. Although both are currently on the payroll of AVI CHAI–Israel, they have tended to function separately. Joint staff meetings now take place roughly every month, and as Eli Silver, AVI CHAI Israel Executive Director, puts it, “We identified a number of areas we thought might be possible for collaboration. ... The sessions have been open and have led to the beginnings of follow-up meetings. There is a lingering question of what will come out of it.” Each institution needs to be certain that a deeper collaboration will not affect the clarity or deliberateness with which it pursues its own goals.

At this point, Beit AVI CHAI has begun extending its programs beyond its current base in Jerusalem, through partnerships with cultural and educational institutions elsewhere. Possible partnerships with institutions in U.S. cities that have large Jewish populations are also under discussion. As its programs grow and its footprint expands across Israel and potentially elsewhere, Beit AVI CHAI will almost certainly need additional operating funds to finance these new efforts. But thus far, apart from modest support from the Jerusalem municipality and the Israeli Ministry of Culture, it has not been able to attract other major external sources of funds. Its ability to assemble a larger, more diverse base of support will determine, more than anything else, how far Beit AVI CHAI will be able to expand its program offerings.

Capacity-building

In earlier years, AVI CHAI had concentrated primarily on creating and supporting high-quality initiatives, rarely investing directly in the organizational strength and fundraising capacity of the organizations carrying out the work. That began to change around 2009, as earlier reports in this series have documented. By now Dr. Silver is able to cite “a new and growing group [of grantees] which have received or will receive an extended, multiple-year final grant along with extensive capacity-building assistance aimed at increasing the likelihood of sustainability after 2019.”³

³ Eli Silver, “Exit Grants Update,” Memorandum to the AVI CHAI Board of Trustees, May 2012, pp. 1-2.

The Foundation’s increased concentration on organizational capacity, as well as some additional flexibility in allowing organizations to stretch out their grant support over more years, has had two benefits. It has led, first, to stronger organizations, and second, as Dr. Silver notes, to “fruitful opportunities to find funders to match AVI CHAI’s money, and [more time] to seek new partners.” Still, not all the results have been positive: “A few [organizations] are flourishing, many are struggling, and a few are poised to close.” Yet it seems likely, at this stage, that more organizations are flourishing or at least surviving, and more of the struggles remain hopeful, than would have been the case without the increased investment in organizational development and fundraising.

AVI CHAI’s Israel staff has approached the capacity-building challenge by dividing grantees into three basic categories. One consisted of organizations with multiple programs and funding sources (and the potential for more), where the principal challenges will be to maintain effective relationships with funders, to manage and account for the different funding streams, and to seek and integrate new sources of support. In cases like this, capacity-building has tended to involve assistance in specific areas of need, such as strategic planning, financial management, resource development, building budgets, using Excel spreadsheets for planning and record-keeping, or generally integrating multiple activities and revenue sources into a central database.

A second category involved a group of comparatively stronger organizations that did not need substantial capacity-building support, but would benefit from informal advice or short-term, inexpensive consultancies. And the third group consisted of grantees chosen for more intensive assistance — organizations ready for the kind of sophisticated management support that growing companies often seek at critical stages in their development. In Israel, blue-ribbon strategic consulting firms rarely have the necessary expertise to serve these kinds of nonprofits, so AVI CHAI has developed its own

team of consultants to work with its grantees. The staff winnowed a pool of 20 candidates down to six finalists and chose one as coordinator. Each grantee then had the opportunity to interview two of the six finalists and choose one as its intensive capacity-building consultant.

Working with AVI CHAI staff and grantee leadership, the consultants analyzed the needs of each of the Category 3 organizations and, when necessary, recruited specialists in particular areas of need, such as financial management, resource development, information technology, evaluation, branding, and marketing. The critical factor in this arrangement, according to the coordinating consultant, Anat Nahmany, is “the trust between the different partners, ... a high level of intimacy between the managers and consultants.” She also believes that the limited time remaining for AVI CHAI in Israel has provided a focus and momentum for the capacity-building effort: “The sense of urgency created a strong need. The need created motivation. I’m not sure that, without the time frame and urgency, we would have seen the same motivation and clarity we have now.”

In the course of the various capacity-building efforts, particularly in the past year, staff members have noticed an increasing anxiety about the coming end of AVI CHAI support. One staff member said, “I felt it much less last year than I feel it now. There’s even a sense of urgency among the grantees that is a little strange, given that we have eight more years. I think that urgency is coming from *us*. ... If you tell an organization you’ll stop funding them in another three years, that’s enough time to raise more funds, make changes, and think ahead. [But] some of them have real problems, and you can’t help but think that, if they don’t get their act together soon, maybe we shouldn’t give them all that money.”

That anxiety is a nearly unavoidable part of the uncertainties associated with any capacity-building effort. The process of changing an organization — especially one that is already struggling with

tight budgets and a small staff — can easily take several years. And even then, patience is sometimes rewarded with failure. Some organizations lose the will and energy to fix their leadership, governance, administrative, and funding problems, and they may be unable to take full advantage of expert assistance. In those cases, funders would probably be wise not to prolong the floundering, and instead to divert scarce philanthropic resources to other uses. But when grantees exhibit the will and determination to improve, the best option for a supportive foundation may well be to persevere, even in the knowledge that not every effort will end in success.

Finding and cultivating funding partners

The AVI CHAI staff, Board, and some grantees have intensified their effort in recent years to find co-funders for essential activities in Israel, some of whom might be willing to continue their support after AVI CHAI’s departure. Chairman Arthur Fried, for example, helped a key grantee form a relationship with a major private foundation. Separately, two top staff members helped the same organization form a working relationship with a government agency that might represent a long-term source of revenue.

Efforts to broker such relationships are now considerably more common than in the past, and are increasingly producing results. A new Forum of Foundations Engaged in Jewish Identity and Education, initially convened by AVI CHAI, now meets several times a year, and it has turned up some potential new funding relationships. Some grantees are also attracting more support from philanthropies outside Israel, not only from the United States, but from Europe as well. Noting that this search for co-funders is comparatively new for AVI CHAI, one staff member observes that “working with partners is a totally different way of working. It’s enriching because every partner has a different agenda and point of view. You have to think differently and take different things into consideration. It’s interesting. And you also have to find the right partners.”

In 2010, AVI CHAI launched a funder-recruitment collaborative called *Pseifas*, involving the Jewish Funders Network Israel, the New York Jewish Federation, and the T'mura Fund. It offered challenge grants to new donors who support eligible organizations. The initial response exceeded all projections: \$1.32 million in new contributions. A second round is now under way. One participant in both rounds, an international organization, believes that participants have benefited from AVI CHAI's history in Israel and from its on-the-ground expertise: "Our partnering with AVI CHAI enabled us to launch a process from the standpoint of the management and knowledge of the field in Israel that most of us simply don't have. It was incredibly positive to work with them in that respect. We had other partners, ... but I would say that AVI CHAI was very much our primary partner, and the lead professionals on the whole process."

This same funder also noted AVI CHAI's increasing openness to working with other institutions and planning its strategy jointly with them: "This year for the first time, AVI CHAI requested a real strategy meeting with us, which had not happened previously. The purpose was to talk about a number of places our work overlaps — things where they are interested in partnering with us; and areas where we're doing a lot and they're thinking of getting into, or areas we're both already in, in a parallel way, and ways we could work together. Around here the feeling was that that was an unprecedented outreach and it was very well received."

"Obviously," this funder concluded, "there is a lot of anxiety about what will happen when AVI CHAI exits the field. But I feel they are doing what they can to share their learning, results, and directions, and to increase the transparency level so that we are all prepared."

Another *Pseifas* participant, and a funder of Jewish Renewal more generally, believes that AVI CHAI's increased outreach to other funders is critical in establishing Jewish Renewal as a "brand" to which

Israeli donors can be drawn. "How do we get the understanding of Jewish Renewal into the Israeli awareness," this funder asks, "so that they see it as important enough to take a serious position? I think the problem is that for so many years AVI CHAI did things so independently. It was a closed circle of work. Now it's important to have branding. If this brand has been so important to the Jewish people, it's important that it gets out there and becomes known to more people. There needs to be a greater campaign on behalf of AVI CHAI's work for people who are not just within the closed community of funders."

A related effort to increase government funding for the field of Jewish Renewal is also under way. The undertaking so far involves a plan to create two new organizations, one to raise money for public education and advocacy efforts on behalf of Jewish Renewal, and the other to serve as an umbrella organization that will seek to strengthen the capacity of all the various nonprofit groups in this field. Some AVI CHAI Board members have been wary of participating in an effort so explicitly designed to influence government action. But others argue that the risks are worth taking because the Israeli government already grants hundreds of millions of shekels annually to educational, religious, and cultural institutions, of which virtually none goes to non-denominational Jewish Renewal efforts. In September 2012, the Board approved this approach, which will likely feature prominently in next year's report.

PART II: THE PROGRAM IN NORTH AMERICA

In North America, AVI CHAI concentrates its grantmaking on three overarching goals: fostering Jewish literacy, religious purposefulness, and Jewish peoplehood. It directs nearly all of its grants for these purposes to the support of Jewish day schools and overnight summer camps. In day school education, the Foundation seeks to advance four interrelated facets of a strong field: institutions, people and networks, ideas and knowledge, and financial resources. "Ideally," North America Executive Director Yossi Prager wrote to the Board

in 2012, “our work in these four areas will be catalytic and result in Jewish day schools that create a foundation for the energizing nucleus we envision: young people with the values, commitments, motivation and skills to lead the Jewish People intellectually, spiritually, communally and politically in the 21st Century.”

To help overnight camps infuse their summer programs with Jewish and Israel education, AVI CHAI funds programs that inspire and train camp directors, assistant directors, and large numbers of seasonal staff each year. “As the Jewish education training options have grown in number and popularity,” the North America staff wrote in a September 2012 program update, “we have also developed initiatives to help the camps coordinate and integrate the efforts of the various staff who work together during the summer on shared education goals.”⁴

As earlier reports in this series have described, AVI CHAI devoted more than two years to a thorough re-examination of strategy and staff responsibilities in North America, aimed at exploring ways of working with other funders and preparing the program for the Foundation’s approaching sunset. As this report is written, that period of questioning and deliberation has largely come to an end. The Board and staff have settled on an increasingly clear view both of how the remaining funds will be allocated and of how AVI CHAI will try to ensure the sustainability of its principal grantees. The latter effort will be bolstered by a planned stream of capacity-building grants to key grantees, eventually amounting to some 15 percent of the total North America grant budget, to help them with fundraising, financial management, and other essentials of organizational development.

One significant outcome of the re-visioning process has been a more deliberate, program-wide pursuit of

⁴ Joel Einleger, Leah N. Meir, and Galli Aizenman, “Overnight Summer Camping,” memorandum to the AVI CHAI Board of Trustees, September 7, 2012, p. 1.

partnerships with other funders. As in Israel, this is a comparatively new mode of operation for the North America program. More and more, however, staff members are collaborating with the staffs of other foundations to design joint initiatives. Reorienting what had been a go-it-alone organization into one that forms partnerships and negotiates strategically with other institutions was a difficult process of organizational change, but both Board and staff members now regard it as a success. “We are walking the walk,” as this same staff member put it. “It’s not just talk anymore, and people recognize that. So in terms of the reorientation, we’ve done it.”

The feeling of urgency about working with funding partners and investing in grantees’ sustainability is a direct result of the impending sunset. Facing the end of its grantmaking in less than a decade, the Foundation increasingly had to decide how, or whether, it would seek to preserve the organizations that had carried out its most important and successful projects. But the only realistic way to recruit other funders to support these grantees would be to work jointly with them on issues of common interest, and thus introduce them to successful work that deserved to be sustained. That strategy is now under way and meeting with at least preliminary success.

In the process, staff members have been given greater flexibility in negotiating grants, with approved multiyear budgets. “What’s different for me even from a year ago,” one staff member says, “is that I’m now playing an end game. I have four years left in which to initiate things programmatically, and the last three years will be overseeing and making sure we stay on track. That window feels very short, and I feel pressure to get it done now, because there isn’t going to be a later. The end feels much more real.”

Human resources and budgeting

Consciousness that their time is growing short — a feeling widely reported in interviews with the North America staff — has apparently not led to any loss of morale. On the contrary, many say that the increased flexibility and the challenge of bringing longstanding

work to a successful end have raised their level of satisfaction and sense of purpose. Not only has the level of effort on longstanding projects intensified to ensure success and sustainability within the next eight or nine years, but newer work has also begun in the meantime, such as on online and blended learning programs (see below). Relatively new efforts in day school finance are similarly at an early stage, and will need to make a significant mark in less than a decade. “Now no one has an extra minute,” one staff member said. “When you are that busy, you realize how integral you are.” Senior managers have assured current members of the staff that, subject to continued high performance, their jobs will continue all the way to the end. As in AVI CHAI’s Israel program, new human-resource needs are being met through limited-term contracts.

The recent years of planning and reorganization have led to a brief reduction in spending while the program was reviewed, pared down, and refocused. In fiscal year 2011, total outlays were more than 37 percent below the approved budget. This was only a temporary dip in expenditures; they returned to more normal levels in 2012. But the reduction was not solely a side-effect of the planning period, which is largely over. Three other factors also motivated the decision not to spend more just yet. The first was that several key grantees were undertaking strategic and business plans, with AVI CHAI support, and new program development with these grantees was on hold until the plans were finished. The second was the Foundation’s decision not to fund any significant initiative without a 50 percent match from other funders. Although this improves the odds of long-term stability for each project, it has added to the time needed to assemble a successful grant proposal. Third, the Foundation has been waiting to learn more from the progress of several new initiatives, such as day school experiments in online instruction and blended learning, and explorations of a multi-partner advocacy campaign for public funding of day schools.

For all these reasons, the program in North America, unlike the one in Israel, has not yet been able to make

projected budget allocations that take it through 2019, and it probably won’t be able to do so for another two to three years. However, new projects have been jelling in 2011-2012, many of them with real prospects for expansion. Even with the increase in spending for 2012 over 2011, the program has continued to hold substantial resources in reserve, to provide for future new opportunities or for current work that shows significant growth potential.

The search for funding partners and successors

AVI CHAI has by now made joint grants with at least eight other staffed foundations, and discussions with more are under way. So far, the amounts involved have usually been small, but many of these relationships have potential to grow. Some grantees have also been successful in attracting additional philanthropic support, often with help from AVI CHAI. The Jewish New Teacher Project, for example, has drawn new support from the Jim Joseph Foundation, the Alan B. Slifka Foundation, the UJA-New York Jewish Federation, and others, and the Project credits AVI CHAI for providing introductions to some of these.

Some members of the AVI CHAI Board and staff have also begun working with officers of Jewish Federations in several cities to identify local foundations and philanthropists who might be open to a funding partnership. Meanwhile AVI CHAI staff members have organized or participated in meetings of potential funders around areas of particular interest, such as Israel education, overnight summer camping, increasing enrollment in non-Orthodox day schools, blended learning, and the affordability of day schools. The gathering on Israel education, for example, was sponsored by the iCenter, a nonprofit organization that promotes and advances Israel education. The meeting had substantial input from AVI CHAI and others, and ultimately attracted between 150 and 200 philanthropists. As a result of that meeting, one participant said, “many ideas emerged, and we held a funders-only meeting [to follow up]. It was a great discussion, and ... I actually think we can accomplish something really big together.”

Reflecting on AVI CHAI's willingness to meet other funders half-way in forming joint-funding relationships, one partner recalled a series of discussions in which there was common interest in a particular grantee, but not much overlap in the specific activities that each institution wanted to support. After much discussion with the grantee and with one another, the two funders found common ground. But it was in an area of work suggested by the grantee — an activity that neither funder had set out to support originally. Looking back on the negotiations, the partner noted that “this was not what AVI CHAI had in mind when we set up the meeting. And I think they showed a lot of flexibility. ... In the end, it seemed like we settled on a grantee that they were interested in supporting but a grant that was more consistent with our areas of interest. I think it was a very good story of cooperation. I was pleased with the outcome, and when it came to negotiating the actual grant, they were very easy to work with on terms.”

This is a story that would have been highly unlikely just three years ago. “Heretofore,” the partner continued, “AVI CHAI's reputation has not been collaborative in the grant-making community, so it will surprise people. ... If early on in this process I realized that they wanted us to finance their [projects] as opposed to really developing something together — meaning [being] open to compromise and to doing things differently, both operationally and [in] the terms of the grant — then while the relationship would have opened the door, it certainly would not have led to a consummated deal, by any stretch of the imagination.” Instead, this funder concluded, “It was a very good story of two very different foundations, each willing to make space for the other and come up with a project they both could be excited about and put resources into, and also share management. That last part is not insignificant.”

To be sure, some funders have been frustrated by the limits on AVI CHAI's openness to partnership. “It's either day schools or camping,” said one. “Once you get outside those areas, there's not a great deal

of interest.” It is true that AVI CHAI has continued to set clear strategic boundaries around the fields in which it will make grants in North America, and that projects outside of day schools and camping are not open to much consideration. Its desire to fortify an “energizing nucleus” for the next generation has led to a focus on those two venues, where the Foundation sees the greatest hope for inspiring and equipping young people with a core of Jewish literacy, religious engagement, and commitment to the Jewish people and the State of Israel.

Furthermore, within those two fields, the Foundation has set firm priorities that govern most of its grantmaking. Although it has broadened its range of possibilities within these fields considerably in order to pursue relationships with other funders, it remains wary of diluting its mission or deviating from its essential purpose, especially with just a few years of grantmaking left. So potential co-funders have found more flexibility at AVI CHAI than in the past, but still within limits. It is noteworthy that the funding partner just quoted has found some areas of common interest despite the limitations, and has expressed an appetite for more.

Squarely within AVI CHAI's emphasis on day school education has been its MATCH program, which matches new or larger-than-previous gifts to day schools. Over the course of three rounds, the Foundation has devoted about \$6 million for these grants. As North America Executive Director Yossi Prager reported to the Board in April 2012, “Data by an independent evaluator indicate that, within 18 months of their original gift, more than 75 percent of donors made a repeat gift, which averaged about 77 percent of the matched gift.”⁵ A new round of MATCH has been launched in 2012, using \$1.3 million left over from earlier rounds, plus an additional \$1 million. To this, the Kohelet Foundation of Philadelphia has added another \$1 million, making a total pool of \$3 million for matching grants plus \$300,000 for administrative

⁵ Yossi Prager, “Jewish Day School Work,” Memorandum to the AVI CHAI Board of Trustees, April 18, 2012, p. 4.

costs. (The founder of the Kohelet Foundation, David Magerman, made his first day school gift in an earlier MATCH round.)

AVI CHAI has recently joined forces with the Charles and Lynn Schusterman Foundation in a project “to create a more intentional and effective system for identifying and training pro-Israel leaders at the high school and college level, and then transitioning them, respectively, into college and post-college Israel advocacy.”⁶ The effort includes a research component, to develop a baseline understanding of the field of Israel advocacy, as well as small grants for new initiatives.

Capacity-building in North America

The AVI CHAI Board has thus far approved a total pool of \$3.5 million for capacity-building generally, plus nearly \$4 million in particular capacity-related grants for three organizations. All of these have been aimed at key institutional grantees that have been at the core of the Foundation’s North America program. Several have received grants to develop strategic and business plans, which will help them forecast their future operations and income and shore up areas of vulnerability. The plans will also guide AVI CHAI as it tries to invest in organizational improvements that will raise the grantees’ chances of success after the Foundation is gone. In other cases, AVI CHAI is helping grantees to explore alternative arrangements, such as mergers or reorganization, that might also contribute to a more sustainable future for them. During the planning period, as Mr. Prager reported to the Board in January 2012, “we have temporarily ceased new program development with the key grantees, ... [although] we continue to work intensively with these grantees on enhancements to existing programs. We want new programs to be a function of the new plans and draw in additional funders who will have been consulted as part of the development of the plans.”

The strategic plans are being finalized just as this report is being completed. As a next step, Mr.

⁶ Yossi Prager, *Ibid.*, p. 6.

Prager added, “we expect to begin on new program development with institutions whose business plans give us a sense of confidence.”⁷ The Bridgespan Group, a leading nonprofit management consultancy, has been retained to assist in the planning and to help implement the capacity-building work that ensues. As one program staff member explains, the support for planning and capacity-building “is being framed as, ‘Let us help you figure out how you’re going to live when you stop getting our grant money.’ It’s very much framed with their interests in mind. We [at AVI CHAI] come to it from the position that we have shared commitments, and we want to help them realize their missions, even as they evolve over time.”

This staff member adds that the hiatus in new program development during the strategic planning has been frustrating for staff and grantees alike. This is a common challenge for foundations whose main stock in trade is innovative, substantive programming: The time and resources devoted to organizational development and retooling can seem a bit uninspiring, albeit necessary — more like garage maintenance than new car design.

Online instruction and blended learning

Among several areas of innovation in recent years has been an attempt to introduce web-based instruction as part of the menu of Jewish day school education. The goals, as Mr. Prager listed them in a 2012 memo to the Board, are twofold: “(1) to increase the quality of day school education through individualized instruction and by enabling students to develop skills and ways of thinking needed in the 21st Century, and (2) to bring down the cost of day school education.” After some exploration and assessment, the Foundation has begun making grants in this area and providing technical support to participating day schools from its Israel- and U.S.-based staff.

⁷ Yossi Prager, “Capacity Building,” Memorandum to the AVI CHAI Board of Trustees, January 11, 2012, p. 1.

The grants support the adoption of online courses in secular studies at existing day schools, the development of new schools incorporating blended-learning models that combine in-person and online instruction, and the creation of online and blended Jewish studies courses. At the time this was written, 18 established day schools are participating in the DigitalJLearning Network, managed by the Jewish Education Project and the Jewish Education Service of North America (JESNA). And all receive grants of \$5,000 from AVI CHAI to help defray their costs in launching the courses. More than 600 students are enrolled in online classes chosen by each school. Three new schools employing blended and online learning to increase personalization and bring down cost have already opened with support from AVI CHAI. Additional schools are being planned.

The effort to develop new Judaic studies courses suited to online instruction has raised some interesting issues. While waiting for curriculum proposals that they assumed would come mainly from universities, AVI CHAI staff members were increasingly encountering independent, entrepreneurial content developers interested in producing new courses. The staff has made some progress in bringing the entrepreneurs together with schools to explore online classes that might meet the schools' needs. Whether this will work — whether vendors can tailor their products to the schools' requirements, and whether schools can come together on some common specifications and standards — is still an open question, which AVI CHAI and its grantees are continuing to explore.

Overnight summer camping

Camping has been the branch of AVI CHAI's work in North America that has benefited the most, thus far, from its effort to cooperate with other funders. Although overnight camping claims just 17.5 percent of the Foundation's program budget in North America, it has attracted two-thirds of the support from new partners. Substantial cooperative grantmaking initiatives in this field have been formed with the Jim Joseph Foundation, and a promising

joint effort in camping has begun between AVI CHAI and the Zell Foundation of Chicago.

The Foundation for Jewish Camp is arguably AVI CHAI's signature grantee in the camping field, and it has been both the anchor and a co-funder in these various joint-funding partnerships. AVI CHAI was one of its earliest supporters, and its budget has since grown to some \$15 million. In 2011, it produced a new strategic plan that promises significant improvement in increasing the number of overnight campers as well as the Jewish quality of their camp experiences. The plan also inaugurated a major effort to identify a larger pool of potential foundation partners for the Foundation for Jewish Camp's initiatives, which turned up about 200 foundations regarded as potential targets.

A promising new initiative, developed jointly with the Maimonides Fund, involves an effort to form an alumni network among the 250,000 people who have participated in the Ramah camp system since 1947. Joel Einleger, the North America staff member who oversees the camping initiatives, envisions the new network as "a combination of Jewish programming that would be relevant to them today," with programs offered in the communities where the alumni live, rather than according to where they attended camp. "The goal," Mr. Einleger explains, is "to break down the lines of affiliation to a specific camp, which is where all affiliations in camps are, and to create local Ramah networks regardless of the specific camp attended. That's built on the fact that our society today is very mobile. You might have gone to Ramah Berkshires, but you live in L.A. now." The arrangement obviously has fundraising potential, but the principal objective is to engage young adults who have benefited from the Ramah experience in a continuing commitment to Jewish life. If it is successful, it could provide a useful model for other camping organizations.

A concluding perspective

In North America, in the words of Chairman Arthur Fried, AVI CHAI is "trying to assure the

continuity of what we call our ‘basic organizational infrastructure’ serving the day school community.” Even with limited time and a gradually shrinking endowment, “we still possess resources that aren’t committed and can be used to continue to experiment with other kinds of activities. We do have seven years to work there, and we shouldn’t rely just on what we’ve done. Who knows what opportunities might be teased out and developed with the remaining assets available for spend down?”

The challenge has been to allow room for experimentation and joint programming with other funders while maintaining a strategic fidelity to projects and organizations that have been central to the Foundation’s mission. “The strategy we see emerging in North America,” Mr. Fried adds, “is to assure the strength of these building block organizations for the day school field; work more closely in cooperation with the Foundation for Jewish Camp, which does have access to a broader pool of funding; work as best we can with philanthropists; and think about new and different ways to strengthen Jewish day school education, including the emphasis on leadership and curriculum.” By preserving program quality, expanding the network of funding partners, exploring new initiatives, and ensuring a constructive and orderly spend down, Mr. Fried concludes, “I think we’re touching on all the sensitive and right spots.”

PART III: THE PROGRAM IN THE FORMER SOVIET UNION

In the former Soviet Union, AVI CHAI focuses on three major areas of work, of which the largest by far is “Engaging Unaffiliated Jews in the FSU,” to which almost three-quarters of the annual budget is devoted. The next largest area is “Day Schools and TaL AM–FSU,” followed by “Academic Programs.” Unlike its counterparts in Israel and North America, AVI CHAI’s program here has been pursuing funding partners from its inception in 1999. The continuing growth of partners’ funds in the former Soviet Union has made it possible for the program to

continue widening its reach, despite the approaching end of its tenure.

“It’s very important to me,” says FSU Executive Director David Rozenson, “that the quality of the various projects AVI CHAI supports is in no way affected by the fact that we’re closing. The reality is that that’s very difficult to do.” In considering this challenge Mr. Rozenson distinguishes between two groups of grantees: those that were already in operation before AVI CHAI’s arrival, which the Foundation then helped to strengthen and expand, and those that were launched with support from AVI CHAI and its partners. This second group, he notes, was developed partly in response to “the reality that the overwhelming majority of post-Soviet Jewry stays away from organized Jewish activity.” Some programs in each category can be weaned from Foundation funding more quickly, given the availability of other sources of support. For the rest, he says, “there are certain programs that we’ll leave more gradually so that their funding needs and organizational sustainability are ensured. [While] we have a number of local and international funders working with us, there is certainly a need for more. As we look toward the future, we will need to expand our partnerships and identify a greater number of successors.”

Widening the network of funding partners

The continual search for — and maintenance of relationships with — other funders is a labor-intensive activity. For a small team that also shoulders the day-to-day responsibilities of program management, juggling the different responsibilities is a challenge. “As in the past,” Mr. Rozenson notes, “together with our staff, I have devoted a great deal of my time to attracting new partners for our work. I find that even though e-mails have value, and Skype conversations sometimes work, it’s almost always the one-to-one contact that works most effectively in forging partnerships. It simply cannot be done long distance. And the truth is, this area requires a great deal of my personal time.”

Given the size of the territory and the likelihood that potential donors do not have much immersion in Jewish life and culture (which was forbidden in the Soviet era and remains relatively weak), it can be particularly difficult to identify the best prospects. In trying to widen the net of prospective partners, Mr. Rozenson wrote in a May 2012 memo to the Board, he is making every possible “attempt to expand the interest of local and international press in programs supported by AVI CHAI–FSU with feature articles and cover stories highlighting our efforts, thereby hoping to further nurture donor relations and ignite the interest of new partners.”⁸

The effort to widen the base of possible supporters comes on top of an already strong record of partner recruitment going back several years. The most recent years demonstrate the sizable harvest from that past effort: In 2011 and 2012, the FSU program has seen major new six-figure contributions from wealthy individuals to three of its book series, one quarter-million dollar gift to the FSU version of the MATCH program for Jewish day schools, and several new five-figure grants for other AVI CHAI projects. Major past support from the Jewish Agency/Israel Ministry of Education, the Genesis Foundation, the Leviev Foundation, and others have been renewed. Smaller grants, both new and renewed, have been raised from other sources as well. All told, the contributions amounted to \$850,000 in 2011 and more than \$2 million in the first nine months of 2012, up to the time this report is being written.

Progress in major areas of the program

The two related **Booknik** web sites — booknik.ru and Booknik Jr. — have grown steadily since the pilot site launched in 2006. From an initial base of 6,000 visitors a month at the beginning, readership has grown to three quarters of a million monthly viewers at the beginning of 2012, according to Google Analytics. Booknik describes itself as a Russian-language internet portal that is designed “to appeal to a wide, diverse, but largely unaffiliated

⁸ David Rozenson, e-mail to the AVI CHAI Board of Trustees, May 6, 2012.

Russian-speaking Jewish audience” that focuses “on Jewish and Israeli history, religion, society, and thought; Jewish literature, art, music and culture; Jewish people and places; Jewish philosophy, ethics and the Jewish spirit; with a special separate site section for children and family reading.”

Eshkolot comprises a mixture of in-person and online events and programs of Jewish study. All of the major live presentations (usually two-hour evening sessions) are video recorded and posted online, together with prepared study materials that can be downloaded from the Eshkolot website, Booknik, and other sources. After only four years, the Eshkolot website has grown from 600 to more than 4,800 monthly visitors. Eshkolot also produces educational brochures, including texts to be studied. This year, in partnership with the Rothschild Foundation (Hanadiv) Europe, the Eshkolot Festivals of Jewish Texts and Ideas have extended the study session model by creating three annual four-to-five-day in-depth study retreats, scheduled during university vacation periods so full-time students can participate. The first festival drew more than 800 applicants for 75 available admissions. It took place on a holiday weekend offering 24 different study sessions led by local and Russian-speaking Israeli scholars.⁹ The goal is to offer five such festivals annually.

Eshkol offers “four to eight monthly in-person programs on Jewish literature and culture, as well as programs for families, all of which include social and edutainment components, and which take place at popular Moscow intellectual clubs and cafes and have an average attendance of between 60 and 150 participants per session.”¹⁰ There is also an Eshkol website, which now averages 8,400 visitors a month, and an e-mail database of 5,000 who receive regular invitations to events.

Several **book publication** programs have by now sold well over half a million books on Jewish themes, spanning fiction, nonfiction, and illustrated books

⁹ *Ibid.*, pp. 12-14.

¹⁰ *Ibid.*, p. 14.

for children. A major local funding partner has granted \$750,000 to inaugurate, together with AVI CHAI funding, the Jewish and Israeli History Series in the Russian language, which will be named in his family's honor. The first three volumes were published in 2012. Another new series, "Wandering Stars," is due to launch in February 2013. It includes treasures of Yiddish literature translated into Russian and receives major funding from two local philanthropists and one American donor. In the "Prose of Jewish Life" book series, 43 of the titles — almost half — have been financed by Russian sponsors or organizations, or from income generated by sales."¹¹ In addition to funding from AVI CHAI, the series of Illustrated Books for Children on Jewish Themes has recently received a renewed annual gift of \$400,000 to name the series in the donors' honor.

AVI CHAI is also committed to strengthening and enhancing the Jewish character of 30 **Jewish day schools** in 18 cities, which are predominantly supported by the Israel Ministry of Education, as well as by other funds from Western and Israeli sponsors and organizations. The Foundation's modest budget of \$700,000 is therefore aimed at specific improvements in curriculum and content, rather than basic, bread-and-butter support. AVI CHAI has also received grants from others specifically to support the use of TaL AM's curricular materials in the FSU day schools. However, the Israel Ministry of Education and the Jewish Agency expect to cut back their respective support in the coming years, as do several Russian philanthropists. So AVI CHAI has launched an FSU Jewish Day School MATCH Program with two major gifts from local donors, mentioned earlier, in addition to its own funding. Other donors are being recruited, and several have expressed interest.

Among AVI CHAI's signature efforts in the former Soviet Union has been its support for **academic Jewish study** at the university level. Results include the establishment in 2005 of an official Department of Jewish Studies in Moscow State University and in

¹¹ *Ibid.*, pp. 15-16.

March 2011 of a Department of Jewish Culture at St. Petersburg State University. These are the two largest and most important academic institutions in the former Soviet Union. The latter was given the authority in December 2011 to award M.A. and Ph.D. degrees, and 50 percent of the department's annual budget now comes from the university and the State. At Moscow State, undergraduate and graduate enrollment has grown from 60 students in the 2004/2005 academic year, when AVI CHAI began providing support for students, to 90 in 2011/2012. Moscow State is by now providing the bulk of the cost of maintaining the Department and its students. AVI CHAI is also providing modest support for Petersburg Judaica, which is part of the European University in St. Petersburg. A lengthening list of private funders has joined AVI CHAI in supporting one or more of these programs.

An AVI CHAI Board member who has devoted particular attention to the FSU program over the years has observed that the program, as well as Mr. Rozenson in particular, "has been very successful in developing the partners/successors campaign. It's remarkable and stunning for all of us to see how much harder it is there [in the former Soviet Union] than it is here [in the United States]." He adds that Mr. Rozenson has been adept at identifying possible partners whom "he understands well and knows what will resonate with them within our portfolio. Then he thoughtfully brings them in and exposes them to it, and exposes to them others who are already AVI CHAI partners. ... For them it's no longer just writing their check and getting their name on it, which it was at the beginning. Now it's writing a check, getting their name on it, and then worrying about the well-being of the grantee."

The nurturing of donors, as the most successful fundraisers attest, entails not merely appealing to their generosity, but engaging them in the cause, in the struggles and achievements of the grantees, and ultimately in the human and social benefits that flow from smart giving. In a region where philanthropy is still embryonic, AVI CHAI's greatest contribution,

beyond the programs and services it has helped launch, may well be its demonstration of the art of mobilizing and motivating donors with an interest in nurturing Jewish life. Some of these funding partners may themselves become leaders and advocates for Jewish-oriented philanthropy long after AVI CHAI has left the scene.

CONCLUSION

In contemplating all that must be done before the sunset of AVI CHAI, it becomes difficult not to reflect, at least somewhat, on *how long* before the sunset the serious thinking about final grants and farewells ought to have begun. Considering the complex negotiations with co-funders, the difficult calculations about grantee sustainability, the high-pressure launch of new initiatives while there is still time to nurture them, and the anxious consideration of possible closures or shrinkage of programs that are not sustainable — in short, all the intricacies of finality — it is difficult not to speculate what might have happened if the terminal planning for AVI CHAI had begun in, say, 2000, rather than 2009.

On one hand, planning the demise of an institution that still had 20 years to live would have struck some Board members as premature, even presumptuous, so far in advance. Trying to envision in 2000 the America, Israel, or former Soviet Union of 2020 would have been nearly impossible. Yet planning the steps that would be required to re-engineer programs for co-funding and sustainability, to recruit co-funders, and to build an organizational culture that fostered funding partnerships and capacity-building, all could have started sooner. Would that have made for a more deliberate environment in these final eight years? That is a proposition impossible to prove. But it seems at least arguable, and maybe persuasive, in hindsight. That appears to be one of the emerging lessons of this series of reports.

Nonetheless, no institution has the luxury of managing in hindsight. So at this point, it suffices to say that, by all evidence, all that must be done will be done before the sunset — as is said about

the onset of Shabbat. The approaching end of AVI CHAI's operations has, if anything, energized and invigorated the staff and Board, to judge from the preponderance of interviews for this report.

Still, at least one important consideration remains to be dealt with. In AVI CHAI's quest for funding partners and successors, its greatest challenge in all three geographic regions has been the fact that, outside the world of Jewish foundations and large donors, and outside the network of organizations it is supporting, its name is virtually unknown. And among the few philanthropists outside of those two categories who may know its name, few have any idea of what it does.

As experience in the former Soviet Union has demonstrated, the better known AVI CHAI and its programs are, the wider the door opens to prospective co-funders (and future successors). But for that to happen, relevant members of the public — especially wealthy members of the Jewish public — must come to grasp why it is important for the entities that AVI CHAI supports to be able to continue doing their good work beyond the Foundation's sunset. To lift its profile, by connecting what it does and wants to do with the interests and involvements of Jews in all three of the regions in which it operates, will require the advice of for-profit marketing and story-telling firms that include professionals who share AVI CHAI's values. Explorations are now under way in North America to identify such firms. Advocacy efforts under consideration in the Foundation's Israel program would likewise set as a clear goal the raising of public awareness of the importance of Jewish Renewal to the future of the Jewish state.

'It should be an awakening'

On a final note, it is important to record that at the start of 2014, in accordance with the Foundation's by-laws, the Chair of the AVI CHAI Foundation will pass from Arthur Fried, who has served in that capacity since the death of the founder Zalman Bernstein, to Trustee Mem Bernstein, the donor's

widow and a senior officer of the Board. Mr. Fried will continue to serve as a Trustee and will continue to work closely with Mrs. Bernstein, as he has done all along.

Among the roughly 60 people interviewed for this report, only Mrs. Bernstein dwelt at length on the issue of branding and marketing. Others alluded to it, and many would seem to share her sentiments. But only she made a forceful articulation of the case. And so it seems appropriate that the next, and possibly final, Chair of the AVI CHAI Foundation should have the last word:

I don't think we make the most of the people we touch. I think the AVI CHAI legacy will be the people who have gone through our programs.

... Those people will be of great value to us in the future, because they will carry it on, however they do it. I don't think we've made the most of that. ...

The stage we're at now is one where we have to start telling the people we've touched — whom I think of as our legacy — that they are our legacy and that we're counting on them to carry on the mission. We have to empower them to do that. We have to tell them that that's their responsibility. ... You have to create a movement. ... It's time for them to know. They should know who we are, what we've done, why we've done it. It's also a P.R. thing: The Jewish newspapers in all the major Jewish cities have to be there. They have to see it, hear it and write about it. It should be an awakening.