

WITHIN OUR LIFETIME

A Reflection on the Spend-Down of the AVI CHAI Foundation

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FOREWORD

This document is a summary of eight earlier and more detailed reports that I prepared nearly every year over the course of a decade. Those reports examined the spend-down of the Avi Chai Foundation while it was in progress, and all of them are available in full for download on both the Avi Chai website (avichai.org) and that of Duke's Center for Strategic Philanthropy and Civil Society (cspcs.sanford.duke.edu). The Foundation completed its grantmaking, as it intended, on December 31, 2019, which now gives me this final opportunity to consolidate and conclude my research, with the benefit of some hindsight and some hypotheses about the future.

The original series of reports was first proposed to me in 2008 by Arthur W. Fried, then the Foundation's chairman and CEO, and Mem D. Bernstein, his successor in that position, in a conversation that I describe more fully in the pages that follow. Their invitation launched me on a long and fruitful intellectual adventure — an exploration of why and how some foundations choose to spend down and why others expect to operate in perpetuity — that altered the trajectory of my academic career. It culminated in a book, *Putting Wealth to Work: Philanthropy for Today or Investing for Tomorrow* (PublicAffairs, 2017), which would never have existed but for Avi Chai's offer to be the subject of an unfettered, real-time study.

That offer was exceptionally courageous, given that the Foundation agreed to cede all intellectual property rights over my research to me and Duke University. As Mr. Fried put it, in a conversation with me in 2019, "We invited you in to chronicle our spend-down. You wrote about it, you criticized some things, you applauded others. We hid nothing from you. Quite the opposite. For I firmly believed we had an obligation to do what other foundations would not even think of doing: getting 'undressed' in front of an outsider and letting him appraise us."

The cooperation of Avi Chai's Trustees, staff, grantees, and funding partners in my research was candid, thoughtful, and more than generous, and I owe them a debt of gratitude that I can never fully repay. I am particularly grateful to the Foundation's three executive directors — Yossi Prager in North America, Eli Silver in Israel, and David Rozenson in the former Soviet Union — for their patience and diligence in serving as sources of incisive questions, checkers of facts, and editors of my writing, year after year. Most of all, I owe unbounded thanks to Mr. Fried, Mrs. Bernstein, and their fellow Trustees, who accompanied me on this journey without interference, impatience, or complaint, offering constant warmth and welcome.

Finally, I want to thank Tony Proscio, my former colleague at Duke and longtime collaborator, for editing and commenting on each of the annual reports over the years and for helping me compile this final summary.

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In 1984, Zalman Chaim Bernstein, one of the most successful financial entrepreneurs of his day, created the AVI CHAI Foundation and dedicated it, in a lengthy mission statement, to encouraging Jews “toward greater commitment to Jewish observance and lifestyle” and toward “mutual understanding and sensitivity,” regardless of their backgrounds or levels of religious observance. He convened a Board of Trustees made up, at first, of Jewish business leaders whom he considered peers and soul-mates, though he gradually added people with other kinds of expertise and Jewish backgrounds whom he trusted. He took extraordinary measures to document the Board’s deliberations and decisions, including nearly verbatim transcripts of every meeting, so as to create a clear record of how the Foundation was to be governed. Grantmaking was to be “Trustee-driven,” meaning that the selection of projects and grants would not mainly be by staff, as in most foundations, but by the Board members.

The purpose of all these steps — the detailed mission statement, the hand-picked and highly empowered Board, the extensive documentation — was to erect solid guiderails to prevent the Foundation from veering away from Mr. Bernstein’s original goals and values after his death. Before creating AVI CHAI, he had accumulated an extensive body of research on foundations that, in his view, had deviated from their founders’ wishes. He made certain that the first staff director hired for the Foundation had read this entire collection of articles and papers before starting work.

He established an inner circle of three Members of the Foundation, a governing core that had the power to select Trustees, amend the bylaws, and elect officers. The initial three Members

were Mr. Bernstein himself and his two most trusted philanthropic confidants: Arthur W. Fried, a lawyer and former managing partner of Lehman Brothers who had gone on to run Yad Hanadiv, the Rothschild Foundation in Israel; and Samuel J. Silberman, then the CEO of Consolidated Cigar Corporation and former president of the Federation of Jewish Philanthropies of New York. Other early Trustees were likewise from the upper ranks of business and finance: Henry Taub, a founder and CEO of Automatic Data Processing, and Alan Feld, a rising star at Mr. Bernstein's firm, Sanford C. Bernstein and Co.

Even as he gradually added Trustees from outside the corporate world — such as the Harvard professor of Yiddish literature Ruth R. Wisse; former publishing executive Lauren K. Merkin; Hebrew University philosophy and math lecturer Meir Buzaglo; and Israeli education specialist Avital Darmon — he continued to place exceptional trust in the Board's expertise and grasp of the Foundation's mission. Although he was an active chairman — and always a commanding presence in any room he entered — he nonetheless sought guidance from the people around the table, sparred with them vigorously over grant decisions, and acquiesced to being occasionally outvoted.

Still, for all the confidence he vested in his fellow Trustees, Mr. Bernstein sometimes expressed anxiety that, after his death, some future Board would lose touch with his worldview and philanthropic purposes. At least twice during his 15 years as chairman, he raised with Mr. Fried and Mr. Silberman the possibility of expending the whole endowment during their lifetimes and then dissolving the Foundation. Both times, in 1992 and 1996, they persuaded him to defer the matter, but the idea plainly appealed to him, and he never abandoned it.

Zalman Bernstein died on January 6, 1999, age 72, of complications from lymphoma. At his direction, his seat as a governing Member of AVI CHAI passed to his widow, Mem Dryan Bernstein. Well before then, beginning when he became seriously ill in 1997, Mr. Bernstein had turned over the Foundation leadership to Arthur Fried, who remained chairman and CEO for the next 15 years, until Mrs. Bernstein succeeded him in 2013.

In late 2000, Sanford C. Bernstein and Co. was sold to Alliance Capital Management, and the resulting liquidation of Mr. Bernstein's shares soon provided an enormous cash infusion to AVI CHAI's endowment. Within two years it had grown to nearly half a billion dollars. Thereafter, strong investment performance would push its value still higher. Throughout his life, Mr. Bernstein had funded the Foundation year-by-year. In the entire 15 years it operated during his lifetime, AVI CHAI had paid out an aggregate \$33 million. At the start of the new millennium and with the swelling of the endowment, that amount would soon be less than a single year's grant budget.

SPENDING UP, SPENDING DOWN

The following year, in his first annual Chairman's Message, Mr. Fried acknowledged that this sudden infusion of wealth had sharpened "the AVI CHAI Trustees' awareness of the role they have been elected to fulfill." That role entailed not only personal responsibility for every grant,

and a clear accounting to the Jewish community for the Foundation's effectiveness, but also putting the entirety of AVI CHAI's endowment to charitable use within their lifetimes. It was the first time such a time limit had been articulated as Foundation policy. "Spending the Foundation's capital, as well as its income, is an important goal," Mr. Fried wrote. "It was the desire of the late Mr. Bernstein that his original goals and vision should be pursued with rigor during the lives of those who helped shape the Foundation's mission statement, and that the vast bulk of the resources he entrusted to them should be spent wisely during their lifetimes." Mr. Fried gave no details about how fast AVI CHAI would spend its resources, or how long it would plan to live. But the die was cast.

The new resources, together with the decision to spend capital as well as income, enabled a giant boost in annual giving and a vastly expanded body of work. Toward the end of Mr. Bernstein's life, AVI CHAI had begun to focus on enriching and expanding Jewish day school education and overnight summer camping in North America and various efforts to spread Jewish learning and promote mutual understanding among religious, traditional, and secular Jews in Israel. With its newfound resources, the Foundation could now not only enlarge those efforts by many multiples, but also expand into the former Soviet Union.

In the early 2000s, new initiatives and experiments proliferated in all three regions.

- In North America, AVI CHAI invested in new curricula for teaching Hebrew language and Jewish studies, new training and mentoring programs for teachers and day school leaders, new ways to enrich the Jewish content of summer camp programs, and an innovative program to finance construction or renovation of school and camp facilities.
- In Israel, AVI CHAI created or helped expand a raft of pluralistic batei midrash, where adults pair up to study Jewish texts and deepen their understanding of Israeli Judaism under the guidance of a moderator. It created programs for improving Jewish education — both formal and extracurricular — in state schools, in some cases by thoroughly re-imagining how Judaism fits into every part of the school day. It cultivated forums of Jewish cultural expression, ranging from small groupings to programs in the great Jerusalem cultural center Beit AVI CHAI, which the Foundation built and opened in 2006. The AVI CHAI Foundation promoted social interaction among Jews of different ethnic backgrounds and levels of religious observance. And it started a groundbreaking film and television production venture that, by the end of the decade, had established Jewish programming — with plots that deal seriously and respectfully with all branches of Jewish culture — as a hugely popular and profitable media market. Together, these fed a wider societal movement that some called Israeli Jewish Renewal and others simply Israeli Judaism.
- In the former Soviet Union, AVI CHAI launched programs to improve Jewish day schools, helped expand and legitimize programs of advanced Jewish scholarship at major universities, created a literary website and publishing series for Jewish literature in Russian, and hosted enormously popular Jewish events at popular literary clubs and cafes in Moscow and St. Petersburg.

The list of new initiatives — and the scope and size of all the most promising ones — ballooned for most of the decade. Even though projects were carefully researched and their strategy mapped out before grants were made, and projects were diligently evaluated (especially after the Foundation added expert evaluators to the staff mid-decade), Arthur Fried was beginning to conclude by around 2007 that the portfolio of projects was becoming “bloated.” Although the research and evaluation had prevented the Foundation from sponsoring anything that was outright unworthy, he wrote that too many projects were merely “okay, or not bad.” The canvass on which the programs were being painted, he felt, had grown so large and full of diverse elements that the picture was losing its clarity. And the level of spending was so high that, by the Foundation’s most conservative projections of its earnings, it might not be sustainable all the way to the projected end date of 2027.

So Mr. Fried already believed by 2007 that it was time for a sharpening of focus, even before world events forced his hand. In the autumn of that year, Lehman Brothers filed for bankruptcy, markets collapsed worldwide, and AVI CHAI suddenly found itself one-third poorer than it had been a year earlier. A foundation planning to operate in perpetuity might have responded to the shock— as many did — simply by biding its time, trimming its spending for a while, and gradually growing back to its previous level of grantmaking as markets recovered. Or it could have chosen to accept its losses and operate as a smaller, but still perpetual, funder. But for an institution set to go out of business in a fixed number of years, the sudden loss of wealth forced a different kind of decision: Should the Foundation continue spending at past levels and bring itself to an end even sooner than planned? Or should it trim its grants budget sharply, so as to continue functioning until the planned end date? Or something in between?

After some anguished deliberation, the AVI CHAI Trustees chose to trim. Before the crash, they had expected to operate the Foundation until 2027, which would have been Mr. Bernstein’s 100th birthday, and had been spending between \$50 million and \$60 million a year. The Board chose to bring the end date forward to 2020 and to trim the grants budget by 25 percent. That would have the double virtue, in their view, of keeping the spending within the available means and also preserving a little uncommitted money that could be used, when the crisis had passed, to seize new opportunities or plan new initiatives in the decade or so that remained.

As Mr. Fried saw it, the decision had a third virtue as well: It would impose an inescapable mandate to pare away the grants that were “okay, or not bad,” or that were tangential to the mission, and focus resources on projects that most precisely and productively served the Foundation’s goals. It would mean putting an end to some relationships with organizations that had done honorable work and lived up to all their commitments and yet, if they were not crucial to AVI CHAI’s mission, would find themselves on the losing end of the cuts. In Mr. Fried’s view, the best time to impose that kind of hardship was when economic conditions made it unavoidable and, therefore, easier to explain to bereft grantees.

“The year 2008 came, in a way, as a real blessing to our Foundation,” Mr. Fried told me. “We used to do almost everything. We tried almost everything. ... We spent liberally across a broad portfolio.” But now, because of the crash, AVI CHAI’s three governing Members (besides Mr.

Fried and Mrs. Bernstein, Lauren Merkin had succeeded Mr. Silberman as the third Member) would have an indisputable reason “to put forward a proposal to draw back. It couldn’t be a guillotine, but we would change our targets.”

Another reason for refining and narrowing targets is that the Foundation’s planned sunset was now much nearer than it had been originally. Moving the end date forward to 2020 — in fact, it would end up being Dec. 31, 2019 — meant that AVI CHAI would now be at the threshold of its final decade and would need to intensify its planning for an orderly, productive conclusion. To ensure that the available money would last to the end — and would leave, as the Foundation intended, at least \$130 million as a permanent fund to operate Beit AVI CHAI — every program would now have to be given a maximum annual budget that was 25-30 percent lower than its largest annual outlay in the past. Each region would need to pare its roster of grantees to reach a level of giving that was below the new annual target, so that it would have uncommitted money available for new initiatives or for expanding older projects that proved especially fruitful.

On Nov. 21, 2008, Arthur Fried wrote to Trustees proposing that the Board ask the three executive directors — Yossi Prager in North America, Eli Silver in Israel, and David Rozenson in the former Soviet Union — to produce a brief summary of each project and a numerical score for every project, based on its quality and centrality to the mission. This information would be presented to Trustees, who would then create their own scoring of grantees based on both the staff’s guidance and the Trustees’ own experience and judgment. The Trustees’ scores would be ranked highest to lowest, and the grantees with the lowest scores in each program would be terminated. Those in the middle ranks would receive reductions in their grant amounts, averaging 50 percent. Those at the top would be preserved or, in a few instances, receive a small increase. The Board agreed, and the staff proceeded to spend roughly the next three months producing the summaries, analysis, and scores.

The process of scoring and winnowing lasted until mid-2009, by which time the budget for North America had been reduced to \$20 million a year from \$25 million, Israel’s had shrunk to \$16 million from close to \$20 million; and in the former Soviet Union the figure fell to \$4 million from a previous \$5 million. Breaking the news to grantees was, as one staff member put it, “wrenching.” But it provided a degree of discipline and clarity that had long been lacking, and in time, most members of the Board and staff came to regard the exercise as both necessary and — because of the clear strategic thinking it evoked — illuminating.

It was the Foundation’s first giant step toward its spend-down. Not only was the exercise driven in part by the need to accommodate the hard mathematics of sunset, but it was the first in a series of reminders that projects would thenceforth all have to be funded, evaluated, and eventually weaned from Foundation support with a constant eye to what they could achieve *by 2020* — and what would happen thereafter. AVI CHAI could no longer support projects that would be likely to make a difference “someday.” From now on, “someday” was a fixed point on the calendar.

As a program officer explained it some years later, the effect would be “to force thinking in a different way than in the past and to ask hard questions: ‘This is how much I have available to spend, and this is how much time I have left in which to do it. What do I want to achieve in this fixed period of time? I cannot achieve everything that I had hoped at one time to do, so what will have the greatest impact and be most meaningful in the time we have left?’ While the spend-down environment places more pressure on each funding decision, it’s also a clarifying and fantastic process to go through so you can home in on a strategy.”

ESTABLISHING A MODEL OF TIME-LIMITED PHILANTHROPY

As they began envisioning AVI CHAI’s sunset and planning its conclusion, Mr. Fried and Mrs. Bernstein followed the Foundation’s standard decision-making procedure: They started by consulting the available research. That is when they contacted me and asked, in effect, “What have the experts written about the best way to spend down?” Although I had recently published a book on American philanthropy and was steeped in the literature on the field, I didn’t know of any research on the issue at all, so I offered to seek it out. As I had suspected, weeks of searching turned up nothing more than a manila folder with a few articles from philanthropic trade publications. None of it was thorough or analytical; mostly it was journalistic accounts of this or that institution deciding to sunset. Soon thereafter, in early 2009, the Beldon Fund released a helpfully detailed report, by Theodora Lurie and Neil Carlson, describing how that foundation distributed its \$100 million in assets over a ten-year period and then closed. But Beldon, which focused on environmental causes in the Western United States, was of only partial relevance to AVI CHAI, given the latter’s greater size, international scope, and profoundly different mission. The manila folder had grown slightly thicker, but not much more helpful.

In that case, Mr. Fried and Mrs. Bernstein suggested, AVI CHAI would offer itself as a case study to help inform the field. “I believe the Trustees owe a report to the Jewish community on what we did with these Jewish dollars,” he later told me, “because we spent them as fiduciaries for the community. That is why we wish to let the world know what we did, and how we spent down, and how we went about our task.” Thus began a decade-long research effort in which I was able to interview Trustees, staff members, grantees, other funders, and any other observer I chose, as often as necessary. I reviewed internal documents, including many that were not meant to be cited or quoted, and read verbatim transcripts of Board meetings that were otherwise confidential. Trustees and staff spent hours offering thoughtful and candid reflections on AVI CHAI’s experience. To ease any fears, I offered to report their comments only without attribution. Except where a speaker’s identity is essential for understanding his or her comments, and where the speaker has granted permission to be quoted by name, I have adhered to that practice.

What I did not adhere to is Mr. Fried’s suggestion that I merely document the Foundation’s decisions and actions in the course of its spend-down. As I began to review AVI CHAI’s standard practices, its methods of self-governance, and its hopes for the continuity of its projects after it closed, I quickly concluded that spending down wisely and with maximum effectiveness would entail marked changes in some longstanding Foundation habits. I was not alone in that

observation — most of my analysis was built on ideas and concerns that I heard repeatedly in my interviews.

My first report, published in April 2010, therefore contained not only a description of the steps AVI CHAI had taken so far to prepare for its spend-down — including the grant-ranking, budget-setting, and a round of strategic planning that followed — but a diagnosis of several longstanding practices that I believed would stand in the way of a fully satisfying conclusion to the Foundation’s work. In brief, these were the three problems I noted.

1. *Go-it-Alone Grantmaking:* From its earliest days, AVI CHAI had chosen to do its grantmaking in North America and Israel almost entirely on its own, without seeking out, cultivating, and recruiting other funders as partners in its initiatives. The program in the former Soviet Union was created about ten years later and was a marked exception to that pattern. Everywhere else, however, Trustees and staff had preferred to identify for themselves the goals to try to achieve and then strike out alone in achieving them. They believed that there was little likelihood of persuading other philanthropies to follow their lead. They also wished to avoid spending precious time, energy and resources on maintaining relationships with other funders. They also did not wish to run the risk of having the sharp edges of their carefully researched, precisely defined strategies blunted by the compromises with other funders that are almost inevitably the outcome of joint efforts of any kind, including grantmaking. The cost of this strategic latitude, of course, was that there would be few, if any, sources of continued funding for AVI CHAI’s grantees and priorities once its final grants had run out.
2. *Neglecting the Organizational Needs of Grantees:* The same single-minded focus on substantive program objectives had led AVI CHAI to concentrate the maximum available number of dollars on program activity and integrity, almost entirely to the exclusion of support for strengthening its grantees as institutions, with the staff, skills, and technology they would need to sustain themselves. The Foundation had almost never provided grant support for its grantees’ management or for the administrative infrastructure necessary to raise money from others; to establish and/or create effective boards of trustees; to improve the quality of their financial, operational and administrative systems; and to plan their long-term strategies and operations. All these functions AVI CHAI had long regarded as “overhead,” tangential to the program goals it was trying to achieve. That bias further compounded the problem of AVI CHAI’s unwillingness to recruit funding partners, because it deprived its grantees of the means of attracting other donors on their own. The result was a portfolio of excellent programs being carried out by fragile organizations, with (at best) uncertain prospects for survival once the Foundation departed the scene.
3. *Trustees’ Concentration on Trees Rather than the Forest:* AVI CHAI long took pride in being a “Trustee-driven” foundation, in which Trustees shared with the program staff the responsibility of conceiving, developing, and proposing grants. No grant proposal went forward to the Board without at least one Trustee’s agreement in advance to support its consideration. The Board of Trustees voted on every grant proposal, and, after approval,

each grant had an individual Trustee assigned to oversee its implementation. That degree of Trustee involvement in particular grants led some of the staff to describe Trustees as being focused “more on the trees than on the forest” — that is, as paying much more attention to individual grants and grantees than to the overarching strategies that their projects were designed to achieve. At other foundations and among governance scholars, this latter duty is normally regarded as *the* primary function of a board.

Confronted with these concerns — which, it bears repeating, several Trustees already shared — the Board initiated far-reaching changes in practice beginning in early 2010, and the change process continued throughout that year. The most visible change, at least within the Foundation, was the Board’s determination to focus more on overall strategy than on individual grants. Predictably, it took some time to formulate an approach to governance that offered the right mix of operating detail and broad strategy, neither too theoretical nor too enmeshed in particular grantees’ struggles. To strike that balance, the staff in each region created a set of strategic categories to which the Board would allocate overall budgets. Within those budgets, and adhering to strategic guidelines set by the Trustees, staff then did the frontline work of preparing and making grants, under the supervision of Mr. Fried and Mrs. Bernstein. Other Trustees were not required to participate in this process, as they had before, though some chose to do so in some instances.

At least once a year, the staff submitted a memo to the Board on each category, summarizing the grants made thus far, the progress of each, and the contribution of all the grants, collectively, to the achievement of goals in that category. The memo then proposed steps in the coming year, to solicit the Board’s views and guidance. The effect on the Board’s deliberation was substantial. As one Trustee described it, the meetings went from being “a tour of every organization in the field to a survey of the whole field and what we hoped and expected to accomplish in it.” Although the Board members were now less involved in the day-to-day decisions, “we actually felt we understood better what we were doing and why.” In North America, Trustees and staff members formed working groups on broad strategic themes and read books together that touched on issues emerging on the horizon. Technology and social networking, for example, were among the earliest subjects on the reading list.

A second set of changes had begun even before 2010 but increased significantly that year. An effort to shore up the organizational strength of key grantees gained momentum as staff became freer to consult with leaders of critical institutions, identify weaknesses in their structure and management (weaknesses that often included deficiencies in fundraising), and try to design solutions. Working with consultants, the staff grew much more alert to grantees’ performance and organizational constraints and more knowledgeable and creative about how to deal with them. Not all of the capacity-building efforts they attempted were successful, and a few were major disappointments. But most of them at least contributed to better management and performance, and by the time AVI CHAI ended its grantmaking, several grantees stood a far stronger chance of survival than they would have otherwise. In a few cases, the Foundation helped broker and implement mergers among grantees that would have had a hard time surviving on their own. These mergers — which are delicate, high-risk ventures

even under the best of circumstances — came together only because of AVI CHAI’s substantial investment in the organizational planning, staffing, and leadership development that went into them.

NO LONGER ALONE

The third set of changes — shifting from go-it-alone grantmaking to working with other funders as partners and co-creators — was more daunting, given the difficult philanthropic landscape in which AVI CHAI functioned. In North America, few Jewish philanthropists were inclined to view the day school world as an integrated system, as AVI CHAI did. Persuading other funders to take an interest in improving the overall system for training and deploying educators, for example, or in raising the prevailing quality of Jewish studies curricula, would normally demand shifting the donors’ focus and interests profoundly. They would have to turn their gaze from particular schools or communities to which they were personally devoted and instead ponder more complex, abstract issues like pedagogy, educational technology, and experiential learning. That would never be easy in any branch of philanthropy — donors have their own passions and sense of mission; they rarely welcome a plea to adopt someone else’s. But in the relatively small world of large-scale Jewish philanthropy, it would be even harder. There simply weren’t that many institutions that might be enticed into becoming partners.

Nonetheless, the AVI CHAI Trustees embraced the challenge. They resolved not only to seek opportunities to work with other donors, but to avoid any new ventures that did not offer a clear opportunity to share the funding with others. The headquarters in North America appointed a senior program officer with a background in strategic communication to quarterback the search for philanthropic allies. In Israel, the Foundation created a forum for philanthropies working in its general areas of programming. The Israel program also created a matching-grant challenge, similar to one that had been organized earlier in North America, aimed at attracting new donors, or substantially increased levels of giving, for projects that promote pluralistic Jewish education. The matching arrangement, called Pseifas (“Mosaic” in Hebrew) launched with an inaugural conference of prospective contributors at the end of 2009 and, by April 2010 it had attracted eligible contributions that were more than twice as much as AVI CHAI, the New York Federation, and the Jewish Funders Network had collectively pledged as matching money. These three organizations promptly provided enough to match the entire eligible pool.

In North America and Israel (following a practice that had already been in place in the former Soviet Union), staff and Trustees devoted escalating amounts of time and energy to meeting with other funders, discussing program initiatives with them, sharing insights and ideas, and seeking, wherever possible, to collaborate on both new projects and longstanding ones. On one hand, these attempts at outreach and collaboration often proved to be blind alleys, frustrating some Trustees and placing extra demands on many people’s time. On the other hand, when they succeeded, the budding relationships often lasted throughout the Foundation’s remaining lifetime and sometimes expanded to include more projects than had originally been contemplated. By enabling AVI CHAI program staff, Trustees, and others to engage systematically

with their peers at other philanthropies, the Foundation invited other funders to get to know its mission and vision, quality of thinking, intelligence, and judgment.

By 2012, the Foundation was making joint grants with at least eight other funders, and discussions with more were underway. A range of admiring professional relationships, as well as some warm personal ones, bloomed from these interactions. Even so, some of them took three or four years to turn into actual co-funding arrangements. The reason is that the terms of engagement did not entail AVI CHAI merely asking another funder to “adopt” one of its projects and become, in effect, a step-parent. That kind of request would have had little appeal and probably would have led nowhere. Instead, as the head of one co-funder put it, AVI CHAI was open to engagements in which two foundations with different priorities and styles of operation were “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.” Those took time to form, but were often big steps forward for AVI CHAI and its agenda.

One of the foundations that have become close collaborators on several projects with AVI CHAI, thanks to this outreach, is the Maimonides Fund. In 2019, Mark Charendoff, its president, shared with me his view that, in most instances, the go-it-alone style of philanthropy is counterproductive in the long term. When a foundation creates new programs and organizations entirely on its own, he said, “you’re factoring out, by my estimate, 80 percent of all donors, who like to feel they’ve created something themselves.” The result can be to leave grantees orphaned if their sole backer steps away. However, Mr. Charendoff nonetheless believes that AVI CHAI’s approach — go-it-alone at first, then seeking collaborators later — did eventually beat the odds and draw major investments from multiple partners.

This is partly because its projects were attractive to other funders on their own merits, Mr. Charendoff explained. The years of careful incubation and development under AVI CHAI’s sole sponsorship did produce effective organizations with real impact, verified by solid evaluations that other funders respected. Furthermore, he added, those projects were “structured in a way that made it very attractive for us to join in.” They provided opportunities for other funders to step in not merely as replacements for AVI CHAI, but as “co-creators” helping to envision and bring about a grantee’s next stage of development.

To be sure, AVI CHAI remained a tightly focused institution with a comparatively narrow range of interests. It was unwilling to be pulled outside its defined areas of activity — day schools and summer camps in North America, pluralistic education and Jewish Renewal in Israel. One funder who found only limited opportunities to work with AVI CHAI in North America said, with some frustration, “It’s either day schools or camping. Once you get outside those areas, there’s not a great deal of interest.” That assessment was accurate. In fact, Mr. Fried, Mrs. Bernstein, and several Trustees had cautioned from the start that a search for funding partners must not entail a loosening of focus or a deviation from core strategy and mission. It could, however — and it sometimes did — open the door to additional ways of pursuing the established strategy and achieving the mission. And along the way, some funding partners did contribute useful new ideas that both fit AVI CHAI’s goals and built upon the other funders’ interests and experience.

One example was the creation, in North America, of Prizmah: Center for Jewish Day Schools, a merger of most of the umbrella organizations serving day schools of their respective Jewish denominations. The effort to create Prizmah was launched on the insistence of the Jim Joseph Foundation, not AVI CHAI. Leaders of Jim Joseph had grown frustrated with the need to support several different, sometimes competing, umbrella groups, all offering their members similar services, struggling along on shoestring budgets, all dependent on the same few funders. AVI CHAI had supported nearly all the constituent groups and agreed, in theory, that they could operate more efficiently if merged. But it feared the exceptional risks of combining so many different groups, each with its own fiercely independent identity. Staff and Trustees were well aware of the discouraging record of mergers in the nonprofit world — especially mergers conducted at funders' insistence. Still, Jim Joseph made a persuasive case, bolstered by AVI CHAI's own experience with these organizations, that a merger would be the only hope of keeping their services alive — including valuable programs that had been started or nurtured with AVI CHAI grants.

As a result, AVI CHAI poured substantial resources, both financial and human, into achieving a productive merger. Its staff spent extraordinary amounts of time, over many months, negotiating with the various boards and staffs, smoothing out disagreements, breaking down distrust and suspicion, and supplying expert consultants to solve the many complex operational problems attendant on fusing so many different institutions. Despite many rough patches along the way, the end result was a consolidated organization that Jim Joseph and other funders could embrace. With AVI CHAI's departure, Prizmah will still need to raise support from other sources, and the odds of sustaining the new entity for the long run remain hard to calculate at the time this is written. But it is clearly on stronger footing than the separate organizations had been before, with a more efficient, streamlined structure and a more persuasive, coherent case to present to funders.

ROOM FOR NEW INITIATIVES

Foundations that are spending down tend to focus first on making a responsible exit from their relationships with longstanding grantees. Only later, often much later, do they begin to waken to the fact that, for one reason or another, they may yet wish to launch a last round of large, legacy-leaving initiatives before sunset. But that timing is usually an unfortunate mistake, because deferring decisions about starting new initiatives to a time so close to the lights-out date shrinks the window of time available to test, build up, and equip the new initiatives to sustain themselves. It is generally wiser for foundations to ask themselves, early in their spend-down planning, whether they will wish to embark on new lines of work in their final years, rather than just winding down old ones. If the answer is Yes, then planning for both the spending down and the building up should start early and proceed simultaneously, at least ten years before the lights go out, so as to ensure that both are manageable in the time remaining.

It is not necessary, of course, for time-limited foundations to approach their conclusion by simultaneously exiting old relationships and starting new activity. Good exits can be demanding

enough to manage, especially if grantees have become highly dependent on grants that will soon disappear. But pursuing some new ideas as the sunset approaches may still be desirable, for three reasons. First, exiting from existing programs is inherently depressing, or at least discouraging, because it constantly reminds staff and trustees that their foundation is inexorably coming to the end of its life. Second, as the end approaches and the full picture of what the foundation has accomplished comes increasingly into focus, some gaps or unfinished challenges are likely to clarify as well. If these are to be addressed, it is wise to begin tackling them early, given that new grantees or new endeavors generally face a relatively flat learning curve. The odds of sustainability will be poor without sufficient time for ramping up, building support, learning, and adjusting.

Another reason to build in some new programming opportunities, alongside the conclusion of past work, has to do with making the best use of human resources. Ending with a bang rather than a whimper is a way of taking full advantage of program officers' talents, experience, and knowledge of the field just when those are at their peak. By encouraging program officers to take on time-limited new initiatives simultaneously with the foundation's exit from old ones, and by reserving financial resources with which to support those new initiatives, a spend-down foundation can avoid wasting its cumulative investment in its most precious resource. That resource is not money; it is the talent of its program officers at the moment when they know more than they ever did before.

For the most part, AVI CHAI did carry out its exits and its new ventures in parallel, beginning soon after the paring of its grant portfolio in 2009. That provided a full decade for gradually bringing current projects to their conclusion and designing, piloting, and launching whole new lines of work. In North America, the most ambitious new initiative was a push for online and personalized learning in Jewish day schools — both to enrich general learning and, more specifically, to bring superior Jewish studies to more schools and students. These included projects to pilot new technology, train teachers to use it, and develop online courses on Jewish subjects. Here, the goal was to help day schools take advantage of the trends in educational technology that the staff and Trustees had read about in their working groups. In Israel, the Foundation undertook sweeping new initiatives to promote Israeli Judaism among youth groups and in local communities, with the aim of encouraging Jewish learning and discovery at the grass roots. Dozens of new grants seeded cultural and educational activities sponsored by community centers, municipal governments, rural collectives in the kibbutz and moshav movements, and gap-year service programs for youth called Sh'nat Sherut.

These new strands of work were possible because of the way AVI CHAI had trimmed its grant budgets in 2009. As it eliminated or shrunk the projects that it considered less central to its mission, it created savings large enough to provide for \$2 million to \$3 million of uncommitted money in each program that could then be available for pursuing fresh opportunities. This was in addition to the minimum of \$130 million that it preserved for its signature cultural center, Beit AVI CHAI. After the market shock of 2008, the Foundation's already conservative financial planning became even more so. Its ultra-cautious spending forecasts, combined with a balanced asset portfolio, meant that the actual return on its investments often exceeded the

conservative forecasts, leaving the endowment with resources beyond what had originally been budgeted.

Having Beit AVI CHAI as a residual beneficiary meant that the Foundation did not have to plan, as other spend-down foundations do, for the use of extra, unexpended money toward the end of its life. It could base its spending on very restrained assumptions about investment returns, with reasonable confidence that all project plans and grant commitments could therefore be fulfilled. If the result was a surplus at the end, that would not be a concern. As one Trustee put it, “We don’t have to spend down” all the way to zero. “We don’t have to panic. We don’t have to go after all kinds of stuff so that we make it to ‘flat’ and end with no assets left.” Indeed, at the end of its grantmaking life, AVI CHAI was able to provide additional resources for Beit AVI CHAI. These are being used partly to help the cultural center expand its online offerings and pursue what the Foundation informally called its *Ufaratzta*, Hebrew for “bursting forth,” when it ramps up programming for audiences well beyond its Jerusalem base.

PROGRAM, IMPACT, AND LEGACY

By 2012, the changes in AVI CHAI’s operations and programs — the pared-down portfolio of old grants, the budding new initiatives, the changes in how the Board did its work — had fully taken root. Increasingly, the Foundation was aiming its grantmaking toward maximizing the likelihood that grantees would survive beyond their last AVI CHAI grant. As Trustee Leif Rosenblatt put it at that time, “Both the Israeli and American staffs, along with the Trustees, have gone through in a thorough way and regrouped their programmatic thinking and prioritized it. In various ways we’re trying to build an exit for most of our programs by implementing sustainability and [helping] them get the tools so that they can reach sustainability on their own. That could be marketing help, endowment-raising help, just planning and budgeting help; or it could be on the cost side, looking at similar enterprises and seeing if they are out of line, and, if they are, can they save some money? There are all kinds of ways we try to generate sustainability.”

The sustainability of grantees is not the only criterion for gauging a foundation’s effectiveness. Success can also be defined by the program’s overall impact on society, the value of its achievements (however measured) relative to the costs, the durability or spread of those achievements over time, the number of people affected by them, or the degree to which the achievements correspond to the tenets of the foundation’s mission. Depending on the project and the moment in time, AVI CHAI has applied each of these criteria, and sometimes several of them in combination, in conducting evaluations and assessing progress.

In fact, the goal of leaving behind a set of strong, durable organizations has not always been a top priority for AVI CHAI, and some members of the staff and Board have argued that it should not be. The Foundation’s mission, they point out, was not to create institutions, apart from Beit AVI CHAI. It was to promote a deeper commitment to Judaism; stronger commitment to the Jewish people, centered on Israel; and greater harmony among Jews of all backgrounds and levels of religious observance. For those goals, the key measures of success are the number of lives touched, the extent of influence on those lives, and the degree of influence those people

will have on others, as they raise families, work in their communities, and participate in Jewish communal life. “The people are the legacy,” Mrs. Bernstein has said. Organizations are important only insofar as they enrich people’s lives; they are a means, she believes, not an end.

But a foundation that chooses to spend down cannot avoid some reckoning with the institutional landscape it leaves behind. An organization such as AVI CHAI, that has seeded multiple fields with unprecedented amounts of money, creating scores of new institutions and programs, cannot help being judged at least in part based on which of those activities are likely to continue. One reason is that most or all of them were plainly launched with the hope of long life and lasting influence. But another reason is at least as important: One way to know whether these activities are as valuable as they seem is to ask whether other donors and philanthropies, with similar missions or kindred aspirations, value them enough to help prolong and enrich their efforts. Whatever other definition of success one might espouse, a program that has developed the means to persevere, that has attracted sustaining support from other funders, and that has disciplined itself to soldier on beyond the nurture of its original and most generous funder — that program is unquestionably a success. Foundations that choose a limited life and plan to exit their fields of activity should, and probably must, confront this admittedly stern standard of judgment, as at least one reckoning of their legacy.

It is therefore worthwhile to reflect on the key achievements in each of AVI CHAI’s three geographic programs, with a particular focus on which ones are likely to endure.

North America: ‘An energizing nucleus’

The largest share of AVI CHAI’s annual grants budget was dedicated to its program in North America, where the emphasis was on the first part of the Foundation’s double mission: “To encourage Jews toward greater commitment to Jewish observance and lifestyle by increasing their understanding, appreciation, and practice of Jewish traditions, customs and laws.” In the early 1990s, analysis of data from the National Jewish Population Survey pointed squarely to Jewish day schools — specifically, at least nine years of day school education — as the most effective route to those goals. The Foundation accordingly aimed the great bulk of its North America grantmaking to strengthening the field of Jewish day school education, with support for the development of new curricula in the Hebrew language and in Jewish Studies, training programs for teachers and principals, and standard-setting projects meant to define and elevate the expectations about what should be taught in such subjects as the Bible, Jewish studies, and Israel. It also sought to ease the difficult economics of operating day schools, by offering loans on generous terms for construction or renovation of facilities and by helping to make a case for public funding of religious schools.

The central goal of this body of work was to create what the Foundation called an “energizing nucleus” of knowledgeable young people who would go on to lead committed Jewish lives. The program concentrated on fostering “Jewish literacy, religious purposefulness, and commitment to Jewish peoplehood, centered on Israel” — a formula abbreviated as LRP. Many projects, perhaps most, served more than one of these three objectives.

One of the most successful has been TaL AM, a curriculum of Jewish studies and Hebrew language instruction. AVI CHAI first funded most of the development of the curriculum and then invested in transforming it into a suite of digital learning tools called **iTaLAM**. In its later years, AVI CHAI helped broker a merger of iTaLAM with the for-profit educational technology firm Compedia, based in Israel. The popularity of the curriculum, combined with the institutional strength of Compedia, make it a solid bet for long-term sustainability. A corresponding Hebrew language curriculum for high schoolers, called **Bishvil Ha'Ivrit**, was created and incubated under AVI CHAI's sponsorship and eventually merged with Israel's nonprofit Center for Educational Technology, another durable host institution. It, too, seemed on steady ground at the time of AVI CHAI's sunset. Both curricula are in wide use around the world,

Training and mentoring programs for teachers, administrators, and leaders in Jewish day schools represented a parallel line of work, with a few grantees poised to continue beyond their support from AVI CHAI. Among the most impressive of these has been the **Jewish New Teacher Project**, part of the California-based New Teacher Center. The program offers young day school teachers high-quality, intensive mentoring by veteran educators, based on a field-leading program model developed by the New Teacher Center for public schools. When AVI CHAI learned of the Center's outstanding reputation and the interest of its director, Helen Moir, in tailoring a version for Jewish schools, it underwrote the creation and launch of the new program. At the time of AVI CHAI's sunset, the Jim Joseph Foundation had committed support to keep it operating for at least another three years. **The Principals Center at Harvard University** is a longstanding training institute for school leaders, for which AVI CHAI funded participation by heads of day schools and added a component tailored to Jewish schools. An anonymous funder began supporting day school participation after AVI CHAI's grants ended.

A different sort of training program — but one that has supplied many highly educated teachers for Jewish day schools — has been **the Graduate Program for Advanced Talmudic Studies for Women (GPATS)** at Yeshiva University. AVI CHAI promoted and funded its creation as a pioneering postgraduate program, including the possibility of earning a Master's degree, covering Talmud, Chumash, and Tanakh. Such an advanced program for women was unprecedented in the Orthodox world, and initially was received only warily by Yeshiva University, but it has now achieved a degree of institutional stability and prestige. The program has continued successfully under university auspices since AVI CHAI ended its support in 2008.

Some noteworthy day school initiatives are still too new, as this is written, to say how long they will be able to persevere post-AVI CHAI. One is **Prizmah**, described earlier, which continues to receive support from the Jim Joseph Foundation but is still vigorously pursuing other funding. Another is the **Pardes Day School Educators Program**, the flagship program of the Pardes Center for Jewish Educators, which was supported by AVI CHAI for some 20 years. The highly selective two-year teacher training program combines intensive classical Jewish text study with a Masters of Jewish Education (MJEEd) from Hebrew College for aspiring day school teachers in North America. Additional funding from the Jim Joseph Foundation outlives AVI CHAI, but that support is declining, and a three-year grant from an anonymous foundation covers only part of

the remaining need. Like Prizmah, the program plainly deserves to continue but will need more backers to replace what it had received from AVI CHAI.

For young people who do not attend day schools, the next most influential route to Jewish learning and observance is overnight summer camping. Camps offer an educational and social environment rich in possibilities for nurturing young people's Jewish identity, although such opportunities were little pursued at most camps when AVI CHAI started investing in them at the turn of the century. Much of the most enduring work the Foundation has supported in this area has been carried out through the **Foundation for Jewish Camp**, an intermediary organization that has sponsored a number of AVI CHAI-funded programs for deepening the Jewish learning experience at camps, training counselors and leaders, and creating models of Jewish programming. AVI CHAI was FJC's most critical early backer, but its circle of supporters has grown ever since.

One signature FJC program that AVI CHAI support made possible is **Cornerstone**, which provides training for returning bunk staff and professional development for camp leaders. All of the training is aimed at cultivating programs and traditions suffused with Jewish values, ethics, culture and spirit. After AVI CHAI's annual support for Cornerstone ends in 2019, funding for it has been committed and will be provided by the Crown Family Philanthropies, the Marcus Foundation, the Morningstar Foundation, and an additional anonymous funder. AVI CHAI also created a **Building Loan Fund**, similar to the one for day schools, that financed camp construction and renovation projects on favorable terms. After AVI CHAI stepped aside, the Maimonides Fund provided new capital for the program, thus ensuring its sustainability.

In a few cases, such as the leadership training program for camp directors known as **Lekhu Lakhem**, or **Yitro**, a similar program for associate and assistant directors, the work that AVI CHAI funded had already managed to blanket the field, reaching virtually everyone who could use its services. These programs might be needed again someday, as new cadres of camp leaders arise, and they might then be revived. But for now, they have deepened the Jewish knowledge and leadership skills of an entire generation, setting a standard of excellence that enjoys widespread recognition, and they thus constitute an unqualified success even without continuing in operation. In other cases, however, it is fair to conclude that a handful of AVI CHAI's overnight camping initiatives will in fact survive its departure, or so it appears at this point. Other philanthropies have agreed to replace some of AVI CHAI's funding for a time, but the level of support over the longer term is still uncertain at the time this report is being written.

Newly created programs and organizations, plus raised standards of performance, constitute two distinct kinds of impact that AVI CHAI brought to the fields of day school education and camping in North America. Some of the programs and organizations it backed will probably endure; others may not. But their combined effect on the fields' prevailing standards and expectations — what some of the people I interviewed called the “ecology” of Jewish education — seems likely to carry on and even ripple outward, if not indefinitely then for an extended period beyond the direct influence of AVI CHAI's grants.

Israel: Nurturing Israeli Judaism

AVI CHAI's primary emphasis in Israel, at least formally, has been on the second part of its dual mission: "to encourage mutual understanding and sensitivity among Jews of different religious backgrounds." In practice, however, this has entailed considerable investment in the first part as well: deepening the "understanding, appreciation, and practice" of Judaism among Israeli Jews. As time went on, the Foundation's work became more and more closely interwoven with the spread of Israeli Jewish Renewal and with the associated proliferation of activities devoted to informal learning, cultural discovery, and observance of the Sabbath and Jewish holidays. Every person I interviewed credited AVI CHAI with sparking, enriching, and helping to sustain this growing trend, beginning with programs of informal education that the Foundation started or helped to expand.

One of the most important of these has been AVI CHAI's critical early support for the founding and nurturing of pluralistic batei midrash. In these programs of informal education, people of different backgrounds — some more religious, some less — study Jewish sources both ancient and modern and deepen their understanding of their heritage. Some, like **Kolot**, are designed to attract emerging leaders into informal study; some, like **ALMA**, offer a more structured curriculum. **MiMizrach Shemesh** is a beit midrash that cultivates community leadership for social change, rich in Jewish tradition, particularly in neighborhoods on Israel's socio-geographic periphery and drawing from the Sephardic heritage. Each of these had won grants from other funders at the time AVI CHAI's grants in Israel were wrapping up, and they therefore seemed likely to be able to carry on, at least for a time, without further Foundation support.

Another highly influential initiative in Israel was AVI CHAI's 15-year-long support for **pluralistic Pre-Army Mechinot**, which engage young people in Jewish study for a year between high school and military service. Approximately 1,800 young, pre-army men and women enroll in those mechinot annually. The mechinot are now sustainable through support from the Israeli Ministries of Education and Religion and from tuition paid by participants, as well as contributions from other philanthropies.

On a separate track, AVI CHAI devoted tens of millions of dollars to enriching Jewish learning in non-religious state schools. The Foundation funded the creation of a degree-granting program at the Hebrew University of Jerusalem, called **Revivim**, that prepares students to teach Jewish studies, and an in-service training and classroom-support program for teachers at the **Shalom Hartman Institute**. The former continues on with support from the university, an Australian foundation, and other donors; the latter has been adopted by the Russell Berrie Foundation, renamed for that funder, and continued to much acclaim. The online learning program **Mikranet**, developed by AVI CHAI in partnership with the Ministry of Education, provides lesson plans, video clips, games, and other resources for teaching Bible studies. It has been enthusiastically adopted in the Israeli school system, which continues to use it.

AVI CHAI also supported two programs aimed at helping selected schools become models for how to infuse Jewish culture and learning throughout the school day. The first, known as **Morasha**, emphasizes the diversity of Jewish culture, particularly in schools with many Mizrahi families. Another program, **Ma'arag**, focuses on embedding Jewish, Zionist, and civic education across multiple areas of school life. Both programs were absorbed by **Kol Yisroel Chaverim**, or KIACH for short, which has itself been a grantee and partner of AVI CHAI. KIACH's sponsorship substantially improves both programs' chances of survival. In the Tel Aviv region, the Foundation worked with the local school district to create a competition among schools to devise better ways of teaching Jewish subjects. For the winners, AVI CHAI and the school district shared the cost of implementation. The project, called **Otzarot**, was soon adopted by Israel's Ministry of Education and became a nationwide program.

The Foundation's earliest and most direct intervention in the state school system was its support for the creation of the **Keshet School**, Israel's first big-city school designed to mix secular, traditional, and religious students. Keshet is now well supported through normal government education funding, and the model had spread to some 40 schools in 25 communities across the country by the time AVI CHAI concluded its grantmaking.

The Foundation's mark on Israel's cultural landscape has been broad and deep, capped by the enduring cultural legacy of **Beit AVI CHAI**. Equally far-reaching and enduring has been the phenomenal success of the Film and Media Project. A stream of award-winning and hugely popular productions has made it a seminal force in the blossoming of Jewish content on television and in the cinema. In 2014, the Gesher Multicultural Film Fund, a frequent AVI CHAI collaborator, joined the Foundation as a partner in a new **Film and Media Collaborative**, with funding designed to last until at least 2026. Three years later, the Maimonides Fund pledged additional financial support that will carry the collaborative beyond that date and continue to feature the AVI CHAI brand — widely recognized as a sign of high-quality Jewish programming — in its productions.

More than a decade of Foundation investment went toward advancing a resurgence of interest across Israel in the Jewish liturgical poems and music called piyyut. AVI CHAI supported some of the earliest stirrings — poetry groups, conferences, regional festivals, and later much larger performances drawing enthusiastic audiences — that fed a now-widespread interest in the art form and its many expressions in various branches of Jewish culture. The Foundation helped solidify this body of activity with the creation of the **Piyyut Website** ([ww.piyut.org.il](http://www.piyut.org.il)), which offers a wealth of background on the poems and music, including hundreds of piyyutim and thousands of recordings. The website is now part of the national Library of Israel and receives support from the Hebrew University and the Israeli government.

One outlier on AVI CHAI's Israel agenda, in that it was related neither to education nor culture, was the rabbinical group **Tzohar**, devoted to training a new generation of Orthodox rabbis able to serve the broad spectrum of society in a warmer, more welcoming manner than is common in Israel. Its signature initiative trains rabbis — more than 800 at the time AVI CHAI's support ended — to accompany the bride and groom throughout the marriage procedures, helping

them sort out the many questions associated with Jewish marriage. The goal is to encourage more couples to honor and enjoy a traditional Jewish wedding and, in the longer run, to retain a positive relationship with their Jewish heritage. Foundation funding for Tzohar declined early in AVI CHAI's final decade, because the rabbis had shown they could replace all their Foundation support. They have since raised additional money as well.

Several ambitious initiatives were conceived and launched in AVI CHAI's late years, despite some anxiety among Trustees that the remaining time was too short for them to take root before the Foundation departed the field. The earliest of these, and also the most complex, was **Nitzanim**, a network of local Israeli Jewish initiatives, in which municipalities, community centers, and other local organizations worked together to create programs of Jewish experience and discovery tailored to each community. Although it started in 2009 and became a free-standing nonprofit in 2013 — thus giving it a decent six-year runway before AVI CHAI support would end — Nitzanim was a challenge to implement and stabilize. It depended on complex local alliances of public and private agencies in each place, governed by steering committees and staffed largely by volunteers, funded by municipal government and private donations, all of which tended to wax and wane over time. A review of the program in 2019 found promising results in many localities but uncertain prospects for stable funding over time.

Nitzanim was the centerpiece of a cluster of other late-breaking initiatives focused on “nurturing Jewish communities,” all of which featured programs of Jewish culture and identity led by community centers and other local organizations. Prominent among these were initiatives in **moshav and kibbutz** communities around the country. The economic and social underpinnings of these mostly rural collectives have changed profoundly in recent years, making it difficult to predict the future of the new Jewish programs they developed with AVI CHAI support.

The Foundation's late years also saw a suite of new programs to cultivate “Young Jewish Change Agents” such as the young people who participate in the gap year of service called **Sh'nat Sherut** or in Israel's 15 **youth movements**. The Foundation's support for enhancing the Jewish educational content in three key youth movements led to an initiative with the umbrella **Youth Movements Council** to spread the development of new Israeli Jewish identity programs throughout the movements' network.

Finally, an unusual initiative called **Shabbat Unplugged** sought to promote the idea of Shabbat as a treasure of Jewish heritage, a period of precious personal and family time that all Jews can savor and enjoy — “sacred” by whatever one's definition might be, whether religious or secular or something in between. The new organization produced online and print ads, promoted Shabbat-related events, and was designing activities and games that would highlight the value of family interaction, rather than online networking, on the Sabbath. Like the programs for youth, Shabbat Unplugged showed promise in its pilot phase, but it was still adjusting its business model as the Foundation's grant window closed. All of these final initiatives offered reasons for hope, along with many unanswered questions — including how enthusiastically funders would respond to their ongoing search for post-AVI CHAI support.

Viewed more broadly, however, the Foundation's projects in Israel have plainly left behind a number of enduring programs and organizations, including digital resources such as Mikranet and the Piyut Website, ongoing programs like the pluralistic mechilot and the Film and Media Collaborative, an array of improvements to the teaching of Judaic subjects in state schools, and a cluster of batei midrash offering informal Jewish learning for adults and young people. All of these, regardless of their institutional lifespans, have already enriched the lives — and, specifically, the Jewish identity and knowledge — of countless Israelis and have helped establish a place for Judaism in Israeli culture that is welcoming to everyone, regardless of one's background or degree of religious observance.

The Former Soviet Union: Learning, Culture, and Identity

In Russia and Ukraine, which have the largest Jewish populations among the post-Soviet republics, AVI CHAI focused nearly all its grantmaking on three major areas of work. The largest in terms of expenditures by far was “Engaging Unaffiliated Jews in the FSU,” to which almost three-quarters of the annual AVI CHAI budget was devoted. This line of work included a wide variety of events and programs, including cultural and literary events, websites, and book publishing, aimed at bringing Jewish culture and history to a wide audience, particularly of young urbanites.

The next largest area was “Day Schools and TaL AM—FSU,” which focused on strengthening Jewish day schools, enriching their Jewish pedagogy, and particularly introducing the TaL AM (and later iTaLAM) Hebrew language curriculum in day schools. The third line of work, in order of budget, was “Academic Programs” — efforts to raise the stature of Jewish studies in post-Soviet scholarship, and particularly to establish departments of Jewish studies in elite universities. Although this last area of activity was financially the smallest of the three, it has scored significant achievements whose effects dwarf the amount of money spent on them.

From almost the very outset, AVI CHAI in the FSU enlisted other foundations and local contributors to join in conceiving and sponsoring its projects, resulting in millions of dollars of support that will continue beyond its sunset. The popularity of several of these projects — both with donors and with the populations for whom they were designed — seems to ensure their continued operation and growth even now, several years after AVI CHAI's work in the region ended.

A prime example is **Eshkol**, an ongoing series of public programs on Jewish literature and culture presented at popular Moscow intellectual clubs and cafes, along with a companion set of programs for families. Eshkol's accessible but sophisticated presentations enjoy a devoted following, as does the program's website. For those who want a somewhat deeper dive into Jewish thought and texts, the related program **Eshkolot** offers a slightly more demanding study program, aimed at young, university-age but largely unaffiliated Jews, with a mixture of in-person and online events. The Eshkolot website offers videos of the live events plus study

materials and links to other sources. The Genesis Foundation later adopted Eshkolot and kept it running post-AVI CHAI, although at a somewhat reduced scale.

Several **book publishing programs** had sold well over half a million books on Jewish themes, translated into Russian, by the time AVI CHAI's doors closed, spanning fiction, nonfiction, and illustrated books for children. A major local funding partner granted \$750,000 to inaugurate, together with AVI CHAI, the Jewish and Israeli History Series in the Russian language. It was renamed in honor of the donor's family and continued publishing after AVI CHAI's departure. Wealthy individuals also contributed to other of the Foundation's book-publishing series.

These literary and cultural projects were the major successes in the portfolio of grants designed to bring unaffiliated Jews closer to their heritage. In the second portfolio, dedicated to **day school education**, were projects to strengthen and enhance the Jewish character of 30 Jewish 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 for this line of work was therefore aimed at specific improvements in curriculum and content, including the introduction of TaL AM, rather than providing basic, bread-and-butter support. AVI CHAI also offered matching grants for major donations to day schools, modeled on similar programs in North America and Israel.

Among AVI CHAI's signature efforts in the former Soviet Union has been in its third category of grantmaking: support for academic Jewish study at the university level. Results include the establishment in 2005 of an official Department of Jewish Studies at **Moscow State University** and in March 2011 of a Department of Jewish Studies at **St. Petersburg State University**. These are the two largest and most important academic institutions in the former Soviet Union. The university and the State are now providing the bulk of the cost of maintaining the departments and their students. AVI CHAI also provided 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, and interest in opening comparable programs at other universities was growing at the time the Foundation exited.

A few projects, despite their high quality, were unable to persevere after their AVI CHAI funding ended. For example, two related literary web sites — **Booknik.ru and Booknik Jr.** — had grown steadily since the first pilot site launched in 2006, and they drew a rapidly expanding audience. Booknik was a highly regarded Russian-language Internet portal featuring articles and videos on a wide range of topics related to Jewish and Israeli history, culture, and thought. It was a literary and intellectual treasure, but it was an expensive enterprise, and it struggled to appeal to other backers, especially when its main private funder chose to pursue other philanthropic interests instead.

Besides the programs and organizations the Foundation leaves behind, an important part of its legacy in the former Soviet Union is the influence it has had on other Jewish funders there. In several cases, AVI CHAI offered new or expanding foundations an opportunity to nurture promising ventures, like Eshkol, the book-publishing projects, or day school enrichment, to

which they remained committed in later years. Working alongside AVI CHAI, local donors had a chance to get to know the grantees, understand their needs, recognize the importance of their work, and find opportunities to make it better. A considerable amount of Jewish philanthropy in the region follows paths originally opened by AVI CHAI.

The Foundation's limited life, and the need to draw its spending gradually to a close in its final years, meant that AVI CHAI would not have time for the decades of effort that some of its boldest ambitions in the region would have required. Nonetheless, the Foundation sought to spark activity and kindle enthusiasm in ways that had a chance of continuing, even growing, after its departure. Not all of those bets paid off, but many — especially in the realm of advanced study — have made indelible changes whose influence is likely to ripple outward, intellectually and culturally, far beyond where they started. That is an outcome that many foundations would accept with pride. But it is the result of determination and risk-taking that few would have embraced at the outset.

LESSONS AT SUNSET: WHAT AVI CHAI'S EXAMPLE SAYS ABOUT SPENDING DOWN

Among the relatively small number of foundations that have chosen to operate for only a limited time, the AVI CHAI Foundation belongs to an even smaller circle: foundations that have completed their spend-down and thus leave an example, and a set of lessons, for the rest of the field. Because most foundations, including perpetual ones, sometimes change direction and exit some area of work, many of these lessons may be useful even for institutions that do not intend to spend down. These nine principles, arising from AVI CHAI's experience, seem especially relevant:

1. Foundations should plan as early as possible for their exits and conclusions. Ten years in advance is not too soon.

Winding down longstanding work, especially with grantees that have been supported at a high level for a long time, is slower and more complicated than is commonly believed. To ensure that grantees have the strongest chances of enduring and thriving after their foundation support ends, it may be necessary to decrease their support gradually; offer help in raising new money; assist in downsizing or mergers to accommodate an expected reduction in income; and help them strengthen their internal management, accountability, and fundraising functions so they will be on stronger footing as they seek and try to retain new supporters. If grantees have been highly dependent on a stream of grants that is now ending, or if they operate in a field with few other funders, they will probably need even more time and support than average as they plan their future.

AVI CHAI had begun envisioning its conclusion, at least in broad and general terms, when it believed it still would be operating for 20 more years. Then came the crash of 2008 and the ensuing recession, and its expected timetable suddenly had to be shortened by several years. To ensure that it would still have resources for new initiatives and unexpected needs, the Foundation had to make steep and swift cuts to some longstanding projects and eliminate others. By doing so in a thoughtful and deliberate way (see the next lesson) it sustained the

best of its work, preserved some unbudgeted money, provided a reserve of funds for Beit Avi CHAI, and, most important, ensured that it would still have ten years in which to carry out a graceful and orderly exit. By the time that exit was complete, on schedule, the overwhelming consensus among staff and Trustees was that the successful conclusion was made possible only because of the early planning, the swift adjustment to new realities post-2008, and the ten-year timetable in which the Foundation could then bring its plans to fruition.

2. In planning the final years of activity, judge all activities for their contribution to mission, and concentrate resources on those that contribute the most.

AVI CHAI's mission, in its full, page-long articulation, was always the first page of the docket book for every Board meeting. At a crucial moment, as the Foundation was about to enter what would become its last decade of grantmaking, the Board systematically evaluated every project and program according to its level of contribution to that mission. The goal was to focus AVI CHAI's remaining resources on activity that made the greatest difference, and to shed lines of work — even some generally productive ones — whose contribution to the mission was less substantial. This exercise of ranking and pruning is a discipline that would benefit any foundation, at regular moments in its history, even if it plans to operate indefinitely.

It is worth noting that the Board's ability to carry out this comparative evaluation and honing of the portfolio was the result, in no small part, of the way it was constituted: with Trustees who shared a passion for the mission but who otherwise brought a diverse range of backgrounds and fields of expertise. They were vigorously independent-minded and comfortable in expressing their views, including their differences, in a civil and respectful manner. Likewise, the Foundation's program officers had been recruited for their dedication to the mission, their diverse areas of expertise, and their intellectual independence. The staff was therefore able to brief and advise the Board on the merits of each grant in a way that was trusted and respected, even if Trustees sometimes came to different conclusions about the final ranking. The professionalism and independence of thought that typified the AVI CHAI team contributed not only to the Foundation's own strategic thinking, but (as an executive of another foundation put it to me) to "setting a bar" for other parts of the Jewish philanthropic world.

3. Think carefully about when to pursue activities on a go-it-alone basis and when to seek partners. When partners are needed, try to involve them early, as co-creators of new work, not merely as sources of money.

Among the problems a foundation chooses to work on, there may be some for which it has the passion, ideas, and financial resources to make a significant difference on its own, and for which other funders do not share a similar enthusiasm. On these, there is no reason not to forge ahead alone. Some goals, however, may call for greater resources or expertise than the foundation has at its own command. Those may call for an alliance of funders sharing the load. Depending on an institution's mix of goals, it may need to strike a reasonable balance between initiatives that it tries to tackle alone and those on which it seeks others' ideas and help.

The advantage of a solo flight is that the Board can chart the course with exclusive focus on its own mission, aspirations, and expertise. The disadvantage, of course, is that the project could

later be orphaned if the foundation departs the scene and no other funder is sufficiently invested in it to want to keep it alive. If, on the other hand, the foundation hopes to share the funding with others, it would do well to engage the other funders as co-owners and co-creators of the work, even if that means some give-and-take in the process of designing an initiative.

AVI CHAI took both routes at different points in its history, starting with a strictly go-it-alone approach and later seeking out partners whom it regarded as collaborators, not merely successors. Its years of solo work allowed it to test and refine strategies and to create first-rate programs, focused solely on its mission, and to evaluate those efforts based on exacting standards defined by that mission. As its grantees proved their merit over the years, other funders could sometimes be enticed to support them, to get to know their leadership, and to envision a possible future relationship with them. This latter step, however, took considerable time and diplomacy. AVI CHAI was careful to invite other funders into the process of imagining and designing new work, and to avoid any suggestion that it was merely trying to pass on its legacy to someone else. This was never easy, and a few projects have had to struggle to escape the impression that they were wholly owned creatures of AVI CHAI.

That struggle is cautionary evidence of the risks of carrying on a strictly go-it-alone philanthropy for too long when planning a sunset. Because it can be challenging to persuade other funders to join a mature project in which they have had no prior role, moving early to widen the circle of funders may be essential. As soon as a project shows, with reliable data, that it is performing well and capable of expanding, it may be time to start involving partners in improving, scaling, or adding complementary initiatives to it.

4. The final years of a foundation's life call for steady leadership and consistent communication. Continuity in governance and executive leadership in this period is valuable. The need for long-term planning, steady execution, and clear, unambiguous communication in the final years of a foundation's life make it especially valuable to avoid disruption on the Board and in senior management. The closing of a foundation can be a stressful, or at least difficult, process for grantees and staff to absorb. Grantees in particular often hold onto a hope that plans will change, that the foundation will not actually close, or that it will bestow some extraordinary, surprise parting grants before it ends. Tamping these hopes calls for transparency about final plans and for repeated, consistent explanations of how the foundation intends to wrap up its work. Staff members and outside institutions, including other funders, also make plans based on the foundation's announced intentions and those plans could be disrupted by late-breaking changes.

AVI CHAI's leadership nominally changed in its final decade, when the chairmanship passed from Mr. Fried to Mrs. Bernstein at the end of 2012. But that transition brought no change to the institution's plans, priorities, communications, or even operating style. The two had been a team from the beginning of Mrs. Bernstein's service on the Board, and they had carefully coordinated their words and actions ever since. Both before and after the transition, they had ensured that the Foundation's channels of communication — from private conversations with other funders to publications, blogs, videos, and public presentations — all conveyed its plans

consistently and accurately. As the Foundation expanded its communications in the final years, descriptions of its final plans and goals, and the progress of its spend-down, remained constant, with the result that it would have been very difficult for anyone with a stake in AVI CHAI's philanthropy to misunderstand its intentions or be surprised by the way they played out.

5. If new initiatives are planned for the final years, it is essential to give them enough time to take shape, ramp up, and become sustainable — closer to six or seven years than to three.

Every new initiative is different, of course. Some take longer to jell than others. But the process of designing and launching new programs or organizations is fraught with unexpected twists and turns, and it is usually a mistake to undertake the process as if everything will proceed on schedule and according to plan. It is useful to allow time for speed bumps, course corrections, and unforeseen complexities. Launching something entirely new in the last three years faces very high chances of disappointment.

Some of AVI CHAI's experiences offer a cautionary example of this principle. For example, the creation of Shabbat Unplugged in Israel was a creative, inspiring act of philanthropic entrepreneurship. But allowing it only three years before it would have to fend for itself was a gamble whose outcome remains uncertain at the time this is written. The organization may well thrive, but its chances of doing so would have been considerably greater if the Foundation had been able to shepherd it for a few more years. Similarly, the creation of Prizmah in North America was a necessary and impressive effort — a complicated merger that wove together six quite different organizations into a functioning whole — but it had a very short start-up phase of just over three years before AVI CHAI disappeared as a funder. Again, Prizmah is doing reasonably well at this point, and it may not have been possible to persuade the constituent organizations to merge any earlier than they did. Nonetheless, its future would be much easier to assess at this point, and its odds of success would probably be much better, if it could have enjoyed a few more years of Foundation backing.

6. Retaining staff members for as long as they are needed requires careful planning, and may warrant some offer of retention incentives, but it is not as big a challenge as it may seem.

AVI CHAI offered a pension supplement to staff members who stayed until the end, and every staff member I spoke to regarded this as both an incentive to remain and a generous sign of appreciation from the Board. It contributed both to stability and morale. However, as sunset approached, Mrs. Bernstein, Mr. Fried, and the rest of the Board drew three unexpected conclusions about this incentive.

First, in the final year or two of the Foundation's life, a few staff members were being offered excellent employment opportunities elsewhere — in positions that would let them continue making important contributions to fields that AVI CHAI had been supporting. The Foundation did not want its pension offer to be the sole obstacle to its employees' advancement. Second, it was becoming clear that not every employee was needed until the very last day. Some were indispensable, of course, but not all. Allowing some flexibility with the retention plan, in cases that were clearly exceptional and for employees whose final responsibilities could be performed by others, seemed perfectly manageable. Third, and perhaps most significant, most

employees were actually happy to stay and wanted to enjoy their Foundation work as long as possible. The pension offer was, for them, at most a modest additional reason to remain on staff.

In a blog post in 2019, AVI CHAI's executive director for North America, Yossi Prager, described four reasons why staff retention ended up presenting no problems for the Foundation's conclusion. He noted that: (a) staff members were hired based partly on their passionate dedication to the Foundation's mission and vision; (b) they were made to feel like full partners in the philanthropic enterprise, not merely hired hands; (c) their jobs presented frequent opportunities to learn and gain new responsibilities, so that they would feel less need to seek advancement elsewhere; and (d) AVI CHAI maintained a flexible policy on work and family life, offering young parents the opportunity to work some days from home. All these factors made it more appealing to work at AVI CHAI and less attractive to seek a change. The pension incentive, though surely significant to some degree, did not even appear on his list.

7. Evaluations are crucial for guiding decisions about final grants and exits, and they can be useful for grantees as well.

Throughout its 35 years, even before it was committed to spending down, AVI CHAI insisted on regular evaluations of all its projects and based funding decisions at least partly on the evaluators' findings. In its later years, the Foundation appointed evaluation experts to its staff in North America and Israel, which significantly raised the number and quality of evaluations it could conduct. As sunset approached, the evaluations proved triply useful. First, they helped AVI CHAI plan tie-off support to grantees based on their particular strengths and needs. Second, evaluations were a means of accountability — a way for the Foundation to report on what it had achieved, and where it had fallen short, in its use of philanthropic resources. And finally, evaluations were often a gift to the grantees who had been evaluated. They documented the grantees' accomplishments and strengths in a professional and objective way, which could then be used to burnish their credibility and help them appeal to other funders.

But evaluations and research were also invaluable in AVI CHAI's planning and grantmaking well before its final years. Serious, independent evaluations formed part of the basis for the Foundation's exercise of comparing and ranking grantees when it pared the grants portfolio in 2009. Other forms of research, including field scans and surveys of program participants, yielded valuable insights into areas of greatest opportunity or need, on which the Foundation could focus its work. The selection of day schools and camping as areas of focus in North America, for example, was the result of extensive research by both an outside expert and AVI CHAI staff and Trustees, who visited more than 100 day schools to identify areas where the Foundation could be the most helpful. Conducting and using such extensive research placed sometimes heavy demands on AVI CHAI's time and money, but the resulting due diligence contributed materially to the targeting of grants and the quality of the program.

8. To leave grantees in a strong, sustainable position, it helps to focus on their organizational needs several years before sunseting. Capacity-building is normally a slow process and may demand some difficult adjustments by grantees and considerable patience from funders.

AVI CHAI made clear, at least in its final years, that its definition of success after sunseting did not necessarily require the long-term survival of every organization and program it had supported. Still, as was discussed earlier, most of its major projects were launched with at least a hope that they would live on after the Foundation departed. Many of its grantees have made, and are making, important contributions to Jewish life and continuity, which AVI CHAI would clearly like to see continue. Hoping to sustain as many of them as possible, the Foundation undertook an earnest effort at capacity-building for its grantees in its final decade, and those efforts at least improved the odds of survival for several of them, even if it did not lead to any outright guarantees of continuity.

Especially in Israel, where the foundation sector is much smaller than in the United States, these efforts faced severe obstacles and challenges. An attempt to seed the field with expert fundraisers — in which AVI CHAI paid the cost of hiring a full-time development staffer at a number of organizations — ultimately proved disappointing. That was partly because of the small number of potential contributors these fundraisers were all targeting, and partly because the grantee organizations had little experience in working with fundraisers and didn't consistently make the best use of them. An effort to create an advocacy organization to boost government support for Israeli Jewish Renewal programs likewise stalled without much success. Nonetheless, other efforts at organizational development for Israeli grantees, aimed at improving their management and governance and sharpening their communications and accountability, did yield tangible, perhaps lasting, benefits.

In both North America and Israel, a focus on organizational capacity sometimes led to the conclusion that the best chances of survival lay in merging organizations that would not have been able to survive separately. These were, like nearly all mergers, complicated and risky undertakings, sometimes painful for grantees and always difficult to implement. In Israel, they included the fusion of two education initiatives under the aegis of the philanthropic organization KIAACH. In North America, two curriculum programs, iTaLAM and Bishvil Ha'Ivrit, merged with technology organizations to provide for a more secure future in the emerging marketplace of educational technology. The ambitious merger of six North American day school intermediaries into Prizmah occasionally seemed destined for failure, but ultimately came to fruition. Fortunately, the Foundation started most of these mergers early enough to be able to see them through their sensitive early years. Yet even so, some remained on unsteady ground as AVI CHAI was saying farewell, and they will have to chart their own course to stability and continuity.

In several cases, AVI CHAI invested successfully in the creation of a networking and advocacy capacity to strengthen whole fields. Its partnership with the Foundation for Jewish Camp in North America, for example, helped enlarge and strengthen an organization that has proven to be an engine of overall enrichment for Jewish overnight camping. A few of the particular programs that AVI CHAI sponsored with the Foundation for Jewish Camp did not survive (in some cases, because they fully served their purpose and were no longer needed). But the enduring strength of FJC ensures that the essential project of creating a better Jewish experience at camps will continue to thrive. In Israel, AVI CHAI's support for umbrella organizations like the

Council of Mechinot and the network of batei midrash known as Panim has almost surely contributed to a stronger future for both kinds of programs.

Across multiple interviews for this report, both inside and outside AVI CHAI, opinion was virtually unanimous that a spend-down foundation — especially one that founds or is the predominant supporter of many of its grantees — has a particular responsibility to help build grantees' capacity, particularly in six areas:

- learning how to raise money;
- building an effective, well-functioning board;
- creating and administering credible, responsible strategic and business plans;
- formulating and implementing persuasive marketing plans for maintaining contact with their multiple stakeholders and exercising diligent stewardship over those relationships;
- developing and administering their human resource planning carefully and sensitively; and
- generally managing themselves according to high professional standards.

Foundations that set out to tackle these challenges need to recognize that it almost always takes more time for grantees to implement the necessary organizational changes than the funder anticipates.

9. Planning for a sunset should include early decisions — preferably several years before the end — about the kinds of information a foundation wants to leave for posterity. It should then make specific plans for an archive and a final web site, along with procedures for cataloguing and preserving documents and electronic records.

The most important questions a foundation should ask as it begins planning its archive are: First, what purpose and what audience is the archive intended to serve? And second, what material is appropriate to make available to the archive — that is, what information is neither too confidential (personnel and compensation records, for example, or private emails and transcripts of closed meetings) nor too minor (routine correspondence, or administrative matters unrelated to program) to include? Then follow the business of choosing an institution to host the archive.

As Yossi Prager, AVI CHAI's executive director for North America, wrote in a 2019 blog post, "Gifting an archive in a responsible way is an expensive proposition, because the archive needs to hire staff to weed out material that should not be included or that will be restricted for varying periods of time. Ideally, archivists will also digitize fragile documents and will be in a position to prepare a detailed index (called a "finding aid") as a tool to researchers. In the modern era, all this needs to be done for both paper and digital material." He noted that working with the archivists took considerable time and effort from AVI CHAI's staff, as decisions were made about what to include in the archive, what must be expunged, and what could be made public only in the future. Documents plainly marked as confidential, for example, were not included. But minutes and transcripts of Board meetings were allowed, after consulting with the Trustees whose unfiltered comments would thus be exposed to scrutiny. Mr. Prager

and his counterpart in Israel, Eli Silver, each retained a seasoned archivist as a consultant to help the Foundation choose a permanent repository for its records and to guide decisions about what to keep, what to discard, and what to keep temporarily confidential, and for how long.

The earlier a foundation starts thinking about these questions, the more it can simplify the process by having solid policies and procedures in place governing what is going to be included and what is not, and who has to be consulted and who doesn't, as well as for how long the materials are going to remain restricted. The earlier these choices are made, the easier it will be at the end to categorize and catalogue the huge body of material destined for the archive.

An archive, however, is not the only — in fact, for most readers, not even the main — source of information about a foundation after it has closed. Other than scholars and people interested in deep research, most readers will probably prefer to consult a website to find historical documents describing grants and grantees, statements of program strategies, biographies of Trustees and staff, and perhaps financial information. Creating a residual website will satisfy this need — though it, too, needs to be lodged with an organization that has the professional skills to maintain it over time, as technology changes. AVI CHAI has not needed to confront this challenge yet, given that it continues to exist as a funding and oversight body for Beit AVI CHAI and can therefore maintain the site on its own or retain consultants to do so. But a foundation that intends to close altogether may want to find an organization that can adopt its website and enter into a contract for maintenance over a given period of years.

A FINAL WORD

The AVI CHAI Foundation set out to pursue an eternal mission in a fixed period of time — not expecting to conquer all the challenges its mission statement elaborated, but to press forward, creating resources, elevating good ideas, and nurturing talented people, to help ensure a richer and more secure future for the Jewish people. It then entrusted its projects and causes to the next generation of leaders and philanthropists, not knowing how long any of its particular endeavors would endure, but hopeful that the best and most promising would find the support they need to persevere.

As Chairman Mem Bernstein has repeatedly said, the Foundation's final aspiration is not necessarily that all the programs and institutions it supported will survive its last grants — though many of the ones described in this report probably will. Instead, she says, "the legacy is the people," meaning the teachers and principals, community and camp leaders, alumni of batei midrash and mechinot, and thousands of other influential learners who have studied with the Foundation's curricula, read its publications, attended its events, seen its films and TV programs, and found — on their own and with expert help — a path toward a deeper, more knowledgeable, and more fulfilled Jewish life. To paraphrase Rabbi Tarfon in *Pirkei Avot*, it was not for AVI CHAI's Trustees to complete the work of its mission, but neither did they desist from it. As with any time-limited foundation, AVI CHAI's achievements are not final, but are a light and an opportunity, to be taken up, adapted, and applied by others to the challenges that lie ahead.