

Changing Jewish Communities

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UJA-Federation of New York: Strengthening a Global Jewish Identity

An Interview with John Ruskey

- *UJA-Federation of New York encompasses New York City's five boroughs, Westchester County, and Long Island. Approximately 1.4 million Jews live in an estimated 640,000 households in the eight-county area, with about one million residing in the five boroughs.*
- *When UJA-Federation reorganized six years ago, it eliminated the distinctions between domestic and international planning and allocations. Recognizing that Jews are a global people, facing the same basic set of issues whether in New York, Tel Aviv, or Moscow, three commissions were charged with overseeing UJA-Federation's three-pronged mission: caring for those in need (chesed), strengthening the Jewish people (klal Yisrael), and renewing Jewish life (chinuch).*
- *In 2005, UJA-Federation of New York raised \$231 million in total resources. The annual campaign closed at \$140 million. Over \$72 million was raised in endowments, and special initiatives represent another \$16 million.*

Strengthening Jewish Identity

John Ruskey has served as executive vice-president and CEO of UJA-Federation of New York since 1999. UJA-Federation encompasses New York City's five boroughs, Westchester County, and Long Island. Approximately 1.4 million Jews live in an estimated 640,000 households in the eight-county area, with about one million residing in the five boroughs.

Ruskey says that UJA-Federation's major reorganization six years ago, ending the division between domestic and overseas issues, reflects a changing worldview: "Maintaining 'domestic' and 'overseas' divisions was anachronistic, yet one still finds it in most Jewish Federations. All our planning, allocating, and fundraising are now rooted in

the concept that we are a global Jewish people. Jews in New York, in Moscow, and in Tel Aviv face similar issues, and those who care about Jewish life do so irrespective of where they live.

"The way Jews face their identity in these three cities and elsewhere is not identical, but it is very similar. In this modern world replete with choices, freedom, and acceptance, people everywhere are confronted with how to embrace and deepen their Jewish identities. Therefore, to have a domestic and overseas organization was dysfunctional. It falsely categorized the distribution of resources, issues, and leadership into 'domestic' and 'overseas,' when, in fact, we share more commonalities than differences.

"The question should have been how a philanthropic entity like UJA-Federation of New York can have maximum impact in caring for Jews, enhancing Jewish identity, and strengthening the Jewish people by developing a sense of global cohesiveness. We have thus created three commissions to deal with our planning and allocations. They reflect the three pillars of our mission: *chesed* (caring), *klal Yisrael* (Jewish peoplehood), and *chinuch* (Jewish identity and renewal).

"This new approach creates a different understanding of collective responsibility. As a global people, we are responsible for one another. Within this context, we believe the Jewish Agency for Israel might be more appropriately named the Jewish Agency for the *Jewish People*."

A Collection of Jewish Communities

When asked if one can identify a specific New York Jewish community, Ruskay refers to a collection of Jewish communities: "The primary community for most Jews is decidedly local. It manifests itself in synagogues, community centers, Hillel student centers, day schools, and camps. Our challenge is to strengthen these gateway institutions so that they are more inspiring centers of caring and Jewish life.

"These institutions must also become the places people can turn to in times of trouble. Through our Partners in Caring initiative, we now have ninety social workers from our human service agencies working in synagogues, Hillels, and community centers. This approach brings the caring of our human service agencies to the places where people naturally congregate."

Ruskay mentions that 70 percent of American Jews are members of synagogues at some point in their lives. "That means they are writing or have written a check to be a member. Some synagogues are breathtaking in the way they provide families with community, purpose, and meaning. We have to better understand why that is so. Similarly, there are Hillels with five thousand students participating in events, but most have nowhere near these numbers.

"We have also to be aware of our past. Until twenty years ago, the external world was a primary factor leading Jews to self-identify and engage in the Jewish community. Now, Jews live in an open American society. We have freedom, affluence, acceptance, and choices unimaginable to our grandparents. In that reality, we have to create institutions that are engaging; we have to give Jews a reason to choose to live as Jews."

Allocations

"UJA-Federation commissioned significant research by social psychologist Bethamie Horowitz. The study, *Connections and Journeys*,¹ reveals that American Jews form their Jewish identity through an ongoing process. It examines the types of institutions and experiences that lead people to determine they want to belong and those experiences that lead people to go elsewhere. We are interested in the journeys of Jews in this open society because people are attracted to places that provide meaning, purpose, community, and a sense of fulfillment."

Ruskay explains the methodology of allocating UJA-Federation's funds. "We start with our core mission, analyze need, and consider where we can have a major impact and how our agencies can help us to get there. We provide unrestricted core funding to our network of agencies and targeted grants through our commissions, reflecting our commitment to Caring, Jewish Identity and Renewal, and Jewish Peoplehood. Slightly more than half of UJA-Federation's money goes overseas and the remainder stays almost entirely in the New York area. During the Israel Emergency Campaign, the percentage allocated overseas increased as we raised an extra \$50 million. This was distributed over two to three years. At the time of the economic crisis in Argentina, more funds went there. Jewry in the former Soviet Union is an ongoing major beneficiary of funds.

"As far as the domestic money is concerned, about 75 percent goes out in unrestricted grants to our agency network, while 25 percent is distributed in a restricted way. The reasons are that some monies come from restricted grants or bequests, or there are specific initiatives from our commissions.

"Inevitably all our agencies will ask for more money with justifiable requests. Furthermore, each agency has advocates in the system. The philanthropic challenge for a federation, however, is to clarify how it can have the most impact as a function of its vision of a global community. It was a major step to move from agency-based to mission-based planning.

"The great majority of the money goes to our agencies, but not all of it. Before the policy change, our grants to agencies went up and down with the tides. For instance, if UJA-Federation's income went up by 2 percent, allocations to the agencies increased in tandem. Now our appropriations committee has taken steps to allocate in response to

emerging issues and changing priorities."

Widely Dispersed Target Areas

Ruskay mentions several examples of recent allocations to indicate how widely dispersed the target areas are. "In 2005, for instance, an additional \$900,000 was granted to our Commission on Jewish Identity and Renewal in response to the view that the issue of Jewish identity is both more urgent today and was relatively underfunded historically. We are providing additional funds so the Jewish Agency for Israel can expand by no less than 10 percent the number of young Jews in the former Soviet Union who can attend Jewish summer camps.

"To bring home the remaining Falash Mura from Ethiopia, UJA-Federation of New York has committed \$1.7 million for each of the next three years-our 'fair share' of responsibility-to support preparation for moving to Israel, language training, the cost of flights, and feeding programs in Ethiopia. "We also allocated an additional \$650,000 for Russian-speaking Jews in New York, including planning and piloting for a larger project. The Russian-speaking group represents 20 percent of the total New York Jewish community. It is a huge challenge to integrate them into the broader community.

"And we are providing an additional \$300,000 to extend Partners in Caring, bringing human service agencies to synagogues, community centers, camps, and day schools."

Synagogues

"Ten years ago, synagogues were relevant to us only because we raised money there. Today, we recognize that in the New York area in particular, synagogues should be helped in various ways.

"In Westchester County, we provided \$2 million over three years for a synagogue "change program" that included twenty-two synagogues ranging from Young Israel to Reform. Each synagogue formed a special team of volunteer and professional leaders, including the rabbi and cantor, that came together for in-depth learning and planning for change in an area identified by the congregational leadership. Prayer, family education, and community building were primary content areas. To launch the process, and periodically during the three years, teams from all congregations met for intensive two-day study and experiential-learning sessions with experts in various fields of synagogue activity. During the three-year period, consultants worked with individual congregations to support the process of learning, planning, and decision-making.

"We have also given a major grant to the Jewish Theological Seminary and Hebrew Union College together, after two and a half years of planning, to develop a major

religious leadership institute for religious schools. This is in addition to the \$3 million a year we allocate to core funding for benefits for teachers in the New York area's day school system.

"Sixty percent of pupils who go to Jewish day schools in the United States are in the New York area. The combined annual outlay of these schools exceeds \$1.5 billion. Yet the system is short of resources. It serves many poor Jews, particularly in Brooklyn and Queens. It probably would need double that amount in order to produce excellence."

Poverty

Ruskay says this is part of the issue of substantial Jewish poverty that New York in particular has to face. "The Jewish Community Study of New York showed that from 1991 to 2001 the number of Jewish poor in New York increased by a dramatic 35 percent. Roughly one-third of the Jewish poor are elderly, one-third are immigrants, and one-third are large ultra-Orthodox families. For a family of four, this means an income of less than \$27,000 per year."

Yet, on this issue as well, Ruskay says, one has to think globally. "There are also Jewish poor in the former Soviet Union, Argentina, and Ethiopia, as well as elsewhere. In Israel and New York there are government-funded human safety nets, however inadequate these may be. These do not exist elsewhere. A Jewish philanthropic mutual fund's responsibility is to first make sure that no one is starving. Thereafter, one has to try to determine where one can have an impact to get people to the next level.

"Similarly, we have a shared responsibility for Jewish education in communities that cannot afford it. A few years ago, Israeli prime minister Ariel Sharon invited a few of us to come to his home for dinner and said 'Israel needs your help; we must make certain that every Jew who wants to can get out of Argentina as the economy there is in a free fall. For those who stay, we have to make sure that they have adequate food and education.' The Federation system made a commitment on the spot for up to \$50 million."

Ethiopian Jews

"Beyond our regular support for the Jewish Agency, UJA-Federation of New York took a strong leadership role in responding to the plight of the Falash Mura. First, the Israeli government made the decision that these people were indeed Jews and that they would be brought home to Israel. Thereafter, UJA-Federation of New York worked to move that forward.

"Our programs represent a deep commitment to the Ethiopian Jewish community in Israel. Parents and Children Together (PACT) and Birth to Bagrut, joint initiatives with the

Joint Distribution Committee, provide an educational head-start for Ethiopian children. We hope to prevent a permanent underclass from developing in Israel.

"UJA-Federation provides \$4.5 million a year to support the absorption of Ethiopian Jews, of which \$2.1 million is allocated to PACT. A few months ago, the mayor of Rehovot told me that in his city Ethiopian children and Israeli-born children are testing on the same level for the first time."

Even More Diversity

Initiatives are indeed very diverse. Ruskay says that he is a product of the Moriah process, in which young members of a North American Jewish forum and an Israeli forum interacted during the 1980s. This project was stopped, and as nobody else wanted to renew it, UJA-Federation in partnership with the Israeli forum created Kol Dor (Every Generation), a global Jewish project that aims to facilitate dialogue and give Jews from all over the world a sense of Jewish peoplehood. At its first conference in 2004 at Sde Boker in the Negev, people in their twenties and thirties worked together for a Jewish future.

"In Israel we have also taken an extraordinary lead in creating the Israel Trauma Coalition in response to the Intifada. We have spent over \$6 million to create a comprehensive system of trauma response for Israel.

"Yet another program is Ashalim for children-at-risk. We created this jointly with a number of Israeli government ministries and the JDC. It deals with pilot projects for teens at risk from drugs, pregnancy, poverty, and so forth. Instead of providing continuous funds for extending support, we develop new models of approaches to dealing with these children. If a pilot project is successful, the model can then be spread through the Israeli system by the government.

"In these programs, there are professional exchanges between our New York agencies and Israeli ministries. Some of our agencies, such as the Jewish Board of Family and Children's Service, are on the cutting edge of human-service development."

Membership of the UJC

"Here in New York, we created an end-of-life Jewish hospice system. We just dedicated the first freestanding eighteen-bed Jewish residential hospice in North America. It is kosher, has Jewish spiritual care available and a synagogue. Now there is another option for patients and families aside from homecare and counseling."

Ruskay also considers UJA-Federation's membership in the organization of the United

Jewish Communities as reflective of the Jewish peoplehood mission. "As the largest Federation by far, we can do many things by ourselves without relying on the UJC. But we consider our relationship with the UJC yet another way of supporting the global Jewish community. Smaller communities need the UJC for marketing, for help, and for personnel development-for a broad range of activities that we can manage ourselves. Yet there are also important activities where the UJC provides services we need. The UJC remains critical in terms of our linkage to Israel, the Jewish Agency, and the JDC."

Ruskay observes: "Despite the much larger workload in fundraising and in planning and allocating, we have not increased our staff. We employ about 480, while ten years ago that number was higher. This is the result of multiple efforts to maximize efficiency and productivity."

Resources

How much money is available and how is it raised? Ruskay replies: "UJA-Federation of New York has in excess of \$231 million in resources for the year 2005. The annual campaign closed at \$140 million. We raised \$72 million in endowments, and special initiatives represent another \$16 million."

When Ruskay joined UJA-Federation of New York in 1992, its annual campaign collected about \$115 million. The annual growth in its resources has been about 2 percent. He comments: "We are swimming upstream philanthropically. In a time of rampant individualism, donors want to do their own thing, including in philanthropy. That may mean supporting an institution they are close to, whether that is a synagogue, community center, or alma mater.

"One can define UJA-Federation as a Jewish philanthropic mutual fund at a time when people increasingly want to pick their own stocks. Our role is to explain to donors that if they only support their own institutions, there won't be a program for Jewish homeless on West 23rd Street. Nor will we be able to respond to Jews in crisis in Israel or Argentina, or to the opportunity of Jewish renewal in the former Soviet Union, or even to the challenge of feeding 175,000 there."

Little Growth in Jewish Philanthropy

"From the beginning, we have supported Birthright programs and we are now allocating over \$1 million per year. There is one issue in its funding that I find perplexing. Initially eleven Jewish philanthropists allocated \$1 million a year for a program that is seen as universally successful. One would have expected that many other multimillionaires would have come forward and said 'I want to mix with these mega-donors. I'll put in half a

million or \$1 million as well.'

"Ten years ago the Jewish papers were writing about the demise of the Federation as an institution. We explained to potential donors that they had to support the collective, and we undertook initiatives demonstrating the role of the Federation system in responding to emerging challenges.

"When we step back now and analyze the situation, the Federated system today has \$2 billion in total resources and raises \$900 million annually. Outside of this, one sees very little growth in Jewish philanthropy other than the ultra-Orthodox community giving to yeshivot."

The Number of Donors

"The number of donors to UJA-Federation's campaign has fluctuated from sixty thousand to ninety thousand over the years. The higher figure represents families with an estimated total of 250,000 people. We can raise the number of donors but at a certain level it doesn't become very cost effective.

"We seek to contain fundraising administrative costs. If we tried to bring in more small donors, we would rapidly reach a situation where of every additional dollar raised the retention would be only 50 cents. The lowest-end donors give under \$1,000. These individuals are approached by direct mail and telemarketing. We can grow that segment, but it is expensive and the 'return on investment' is low.

"Most of our leadership no longer believes that for such donors the fundraising contact with UJA-Federation is a very significant form of belonging to the community. Our present thinking is that if we must choose, increasing the total resources raised is more important than the number of donors.

"This requires focus. Sixteen thousand to seventeen thousand of our donors give us from \$1,000 to \$25,000 annually from across all our campaigns-trades, professions, regions, womens' campaign, as well as young leadership. Many consultants have encouraged us to focus on that particular group. At the high end of this range, one already has to work on one-to-one relationships.

"Focusing means that we also try to strengthen UJA-Federation's resource capacity by identifying among those people who come together in groups the ones who have a substantially greater capacity to give. The next question is how to effectively engage them, perhaps through a one-on-one approach."

Site Visits and Missions

"Domestic site visits are an important tool in our fundraising. When I joined UJA-Federation, five hundred people participated in these programs each year. We take them around in small groups or sometimes just one couple or one person. This year two thousand people will partake in these programs. We also take hundreds of people on missions to Israel each year. The impact, when you see the work done firsthand, goes far beyond words. In marketing terms, I would describe it as 'heavy-duty retail.'

"Times have radically changed. Twenty-five years ago, a very successful fundraising method was to have a major Jewish leader get on the phone and say to the person on the other end 'you must give-Israel is in trouble.' Now with every person, we have lengthy conversations that may vary from politics to Jewish education, to Diaspora-Israel relations, to emerging priorities. Our approach with a major donor now has to be multifaceted, nuanced, and complex."

Dealing with the Next Generation

"Every Jewish organization is dealing with the next generation. How do you engage those in their mid-twenties and thirties? We are at the end of the generation that had their memories and souls seared with a sense of Jewish obligation as a result of the Holocaust and the establishment of the state of Israel. Today, the 1967 war is prehistory. We are now dealing with a generation raised in a very different environment.

"Meeting this challenge requires multiple strategies. We are reorganizing young leadership and what we call Jewish philanthropic venture funds, which are a form of stock collective. Those who are not connected to us will take a certain amount of money-the first example is \$50,000 a year-put it into a collective and work with our staff to determine how they and we can use those funds most effectively. For many, this represents an opportunity to learn about our agencies and about our work. To date it has only led to positive results in terms of their giving, their Jewish involvement, and knowledge of the system."

Ruskay, in conclusion, says it is therefore not difficult to predict that major flexibility will also be required in the future to fulfill UJA-Federation's mission of "caring for those in need, rescuing those in harm's way, and renewing and strengthening the Jewish people in New York, in Israel, and around the world."

Interview by Manfred Gerstenfeld

Notes

1. www.jewishdatabank.org/CJ2003.pdf.

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After earning his doctorate in political science at Columbia University, Dr. Ruskey served for six years as educational director of the 92nd Street Y and then for eight years (1985-1993) as vice-chancellor of the Jewish Theological Seminary. He came to UJA-Federation of New York in 1992, where he was appointed executive vice-president and CEO in October 1999. In this post, he serves as the senior professional of the largest Federation in North America and the largest local philanthropy in the world. UJA-Federation of New York raised more than \$231 million in 2005 and leveraged that to several billions of dollars for local, New York, and overseas services.

Manfred Gerstenfeld, Publisher • Chaya Herskovic, Editor • Howard Weisband, Associate Editor • Jerusalem Center for Public Affairs (Registered Amuta), 13 Tel-Hai St., Jerusalem 92107, Israel; Tel. 972-2-5619281, Fax. 972-2-5619112, Email: jcpa@netvision.net.il • In U.S.A.: Center for Jewish Community Studies, 5800 Park Heights Avenue, Baltimore, MD 21215 USA; Tel. (410) 664-5222, Fax. (410) 664-1228 • Website: www.jcpa.org • Copyright. ISSN: 0792-7304

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