AGAINST STRONG HEADWINDS

The AVI CHAI Foundation's Bold Vision and Relentless Persistence Succeeded in Strengthening Jewishness in Countless Measurable Initiatives

Final Report on the Concluding Years
of the AVI CHAI Foundation

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The Torah is a tree of life for those who grip it
and are gripped by it; they will draw
self-renewing strength from it
that assures their blessedness forever.

— *Proverbs 3:18*

It will never be forgotten
by the generations of their children.

— *Deuteronomy 31:21*

FOREWORD

This report is based on a thorough review of board minutes, internal documents, and published reports of The AVI CHAI Foundation, and on dozens of interviews with the Foundation's senior officers, staff, grantees, and funding partners, conducted in the United States and Israel in the summer of 2019. Except where otherwise noted, quotations are drawn from these interviews.

BACKGROUND

This is the eighth and final installment in a series of reports on how The AVI CHAI Foundation is going about completing its grantmaking by December 31, 2019. The Foundation was established in 1984 by financier Zalman Chaim Bernstein, z"l[1], with the mission of strengthening Judaism, Jewish literacy, and Jewish tradition; promoting mutual understanding among Jews of differing religious orientations; and sustaining, enlarging, and enriching Jewish commitment to the State of Israel. AVI CHAI has made grants in three regions: North America, Israel, and the former Soviet Union (FSU).

In 2004, following the strongly implied wishes of its donor, who died in 1999, the Foundation's Board of Trustees decided, and then announced in 2005, that it would cease grantmaking operations within a fixed period of time. This series of reports has described, nearly year-by-year, the process by which AVI CHAI has planned and carried out its last rounds of grantmaking, as it sought to achieve significant, lasting objectives in the time remaining and leave its grantees stronger and more fully equipped to carry on the parts of their mission that the Foundation has supported.

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

PREFACE

"We will, because of your reports, let the world know of what we did with the munificent bequest of Zalman Chaim Bernstein. We chose not to sing our own praises. 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 reason is that we lavishly spent someone else's money. He did not put his name on the door. He did not put his children on the Foundation's board. He recommended that his wife serve for a time as Chairman. He was quite wise in that request. She surely grew into the position.

"I believe the Trustees owe a report to the Jewish community on what we did with these Jewish dollars, 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."

— *Arthur W. Fried, Trustee and former Chairman, The AVI CHAI Foundation*
Interviewed in Jerusalem, June 6, 2019

PART I: OVERVIEW

IF FOUNDATION SUCCESSES were measured by the success rates of for-profit start-ups, the AVI CHAI Foundation would now likely be regarded, as it approaches its end as a grantmaking institution, as having achieved an enviable all-time record. Admittedly, there are many ways to define "success" in a philanthropic program — including 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. AVI CHAI has used several of these criteria over time to judge the value of its projects — most memorably when, in 2009, it winnowed its list of grantees so as to focus in its last ten years only on those that were most critical to its mission.

But for this report — written just two months before AVI CHAI's grantmaking life ends — I intend to concentrate on one criterion above all: what activity will survive when the Foundation exits the field. This definition of success is not universally embraced at AVI CHAI. Indeed, some of its staff and Trustees argue, persuasively, that its mission was not to create a host of new and enduring institutions, but "to encourage those of the Jewish faith towards greater commitment to Jewish observance and lifestyle" and "to encourage mutual understanding and sensitivity among Jews of different religious backgrounds." By that reckoning, success does not depend on whether a given organization is able to carry on once AVI CHAI's support for it has ended.

Instead, if a program sowed seeds of understanding, commitment, observance, solidarity, or any combination of those things, and if those seeds bore plentiful fruit in the form of enriched Jewish lives and invigorated Jewish leaders, then that would be enough. Success would inhere in the people who learned or were inspired by the programs, not by the life expectancy of the programs themselves. I do not quarrel with that position. Indeed, if I were to take only that perspective, I would still conclude, as I did at the outset, that AVI CHAI's record of success would be enviable both within and outside of philanthropy.

But for an organization that has seeded multiple fields with unprecedented amounts of money, creating scores of new institutions and programs in three regions with large Jewish populations, I believe it is essential to examine which of those activities are likely to continue. One reason is that most or all of those activities 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 success.

As it happens, the AVI CHAI Foundation has ample grounds for satisfaction with its record by this measure. Many of the Foundation's initiatives now have solid commitments from well-known, reputable foundations, individual philanthropists, or established governmental entities for a varying period of years after the lights go off in The AVI CHAI Foundation's grantmaking role. My interviews with most of the philanthropies that have committed themselves to pick up where AVI CHAI leaves off are unambiguous to the effect that they are making their commitments for the long run, because of the excellence of the initiatives that AVI CHAI has crafted and financed. My judgment is that the likelihood of continuing support beyond the short run by most of them is high, but of course will depend on how well the initiatives fulfill their missions under the oversight of the new funders.

To be sure, not all of AVI CHAI's initiatives have been successes by this standard. Even so, the Foundation significantly exceeds the normal success rate for for-profit start-ups, which is normally a maximum of two successes out of ten attempts. Moreover, each of AVI CHAI's individual "grand slams" confers powerful benefits towards the achievement of its mission. In short, the Foundation has managed not only to create an array of new organizations and programs that will outlive its financial support, but also to imbue those creations with means of enriching Jewish lives and strengthening Jewish peoplehood that had not existed before, at least at any comparable scale.

What's more, that standard-setting record had been accomplished against the strongest headwinds in years now prevailing in the Jewish communities of North America, the State of Israel, and the former Soviet Union. Perhaps even more remarkable is the fact that such a record has been accomplished by a single foundation engaged in change-producing simultaneously in all three of those very different geographical areas, each with its own specially tailored goals and strategy.

Much, perhaps most, of this remarkable record can be ascribed to the exceptional collection of talent assembled to pursue the Foundation's mission. The high quality of the staff and Board, like the mission itself, is a direct outgrowth of the donor, Zalman C. Bernstein, z''l, whose wealth, passion, and ingenuity created AVI CHAI. In his Foundation, as in the business he started, Sanford C. Bernstein and Co. (today AllianceBernstein), the founder's knack for recognizing, challenging, and retaining skilled professionals was legendary. Alan Feld, an early Bernstein & Company partner who joined the AVI CHAI Board in the Foundation's early years, believes Mr. Bernstein was obsessed with recruiting the smartest people he could find and then relying on them to challenge his judgments whenever they saw fit.

For most of its history, until a strategic re-thinking in 2009-10, AVI CHAI was, by its own description, a "Trustee-driven foundation." That description was accurate in many ways — for example, no grant could be presented to the full Board without the endorsement of at least one of its members, and most lines of work started at least partly through the instigation of at least one Trustee. After 2010, this level of Trustee involvement in routine

decisions receded, as the Board began allocating general budgets to various areas of activity, within which the staff could make specific allocations subject to oversight and approval by Arthur Fried and Mem Bernstein. And yet even under the earlier, grant-by-grant approach to Trustee leadership, the staff's due diligence, analysis, and recommendations had always carried considerable, sometimes decisive weight. AVI CHAI's process of decision-making on grants was often a "no-holds-barred," wide-open discussion from bottom to top and back down again among program officers, program directors, individual Trustees, and the Chairman and Chairwoman of the Foundation. Consequently, the skills, expertise, insight, and independent-mindedness of each member of the staff and Board were integral to the quality of AVI CHAI's thinking, decision-making, and ultimate successes.

Mem D. Bernstein, the founder's widow and today the Chair and CEO of AVI CHAI, attributes all of this to her late husband's diligent entrepreneurship. "The same vision that he had in his business," she said, "he wanted in his philanthropic endeavors as well. And that had to do with research before, and evaluation after, and the hiring of people, and the vetting of those people, and the training of those people." To preserve and pursue that vision, Mr. Bernstein chose as one of AVI CHAI's founding Members Arthur Fried, a brilliant lawyer who was a managing director and CFO of Lehman Brothers and later of Yad Hanadiv, the Israel branch of the Rothschild philanthropies.

Mr. Fried is widely — and, in my judgment, correctly — regarded as an artist in philanthropic leadership. As CEO of Yad Hanadiv, he took an investor's approach to grantmaking, which included developing institutions that permanently altered the educational and cultural landscape in Israel. For example, he shepherded two organizations established under his predecessor, the Open University and the Center for Educational Technology, through a period of rapid growth and radiating influence. Later, in the last years of Zalman Bernstein's life, Mr. Fried assumed the AVI CHAI chairmanship and applied the same methodical approach to creating, evaluating, and nurturing new ventures there. Not long after, he and Mrs. Bernstein began preparations for bringing that Foundation's work to an end, as its founder had expressed a desire to do, within two decades.

In 2009, Mr. Fried involved all Trustees and program staff in a comprehensive assessment of every one of the Foundation's grantmaking initiatives. He then led the Trustees through a plan to determine the annual budgets for each geography through the end of the institution's life. Instead of arbitrarily deciding which existing grants would be terminated or reduced, he asked the staff to summarize and rate the current grant relationships, and the entire AVI CHAI Board then did likewise, ultimately voting on which grantees would continue at their current level of support, which would be reduced, and which ones would cease. It was a pivotal moment in the Foundation's governance and strategic thinking, and perhaps the best example of the adroitness of Mr. Fried's leadership. The principle of "research before and evaluation after," which governed these strategic choices, had its roots in Mr. Bernstein's vision, an ideal expression in Mr. Fried's leadership, and now a continued manifestation in the chairmanship of Mem Bernstein, who has described her early years at the Foundation as an "apprenticeship" at Arthur Fried's side.

Through most of those years, until AVI CHAI's last decade of grantmaking, it had chosen to pursue its mission largely on its own, designing its own initiatives and devoting considerable resources to launching and refining them, without seeking joint investments from other funders. A matching grant program in North America, launched in 2004, was a major exception, but even so, it proved the rule: It was a unique venture, unlike anything else in the Foundation's portfolio, at least until a similar program was launched in Israel more than five years later. Moreover, its purpose was to draw more funding into Jewish day school education generally, not to pursue any of the specific, detailed objectives that underlay the rest of the AVI CHAI program. For the projects it considered most integral to its mission, AVI CHAI largely funded projects on its own, on the theory that successful projects would eventually attract other funding by virtue of excellence alone.

In 2011, the Trustees formally resolved to shift gears away from its prior "go it alone" philosophy and instead do what it could to begin to attract the investment of philanthropic partners in existing or contemplated initiatives. At that point, Yossi Prager appointed Deena Fuchs, an experienced senior program officer, to lead the effort to build partnerships. I believe that it was that decision to begin seeking partners to support existing initiatives that is now contributing significantly to the steadily increasing number of agreements in which the Foundation and/or its grantees have attracted support from other funders that will continue after the Foundation ceases grantmaking. 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. A range of admiring professional as well as warm personal relationships bloomed from those interactions, which began to pay off three or four years later, as those other philanthropies began considering "adopting" or "sharing financial support" for impressive initiatives that had been conceived and nurtured into adulthood during AVI CHAI's earlier phase of going it alone.

Mark Charendoff, president of the Maimonides Fund, is among the people who have become close collaborators with AVI CHAI in this process. In an interview with me, he described himself as skeptical of the idea that projects launched by a single foundation can readily attract other supporters later. "When you premise your actions on that theory," he said, "you're factoring out, by my estimate, 80 percent of all donors, who like to feel they've created something themselves." Still, he acknowledges with some surprise that the "go it alone" approach eventually paid off for AVI CHAI — not only because its projects were indeed attractive on their own, but because those projects were "structured in a way that facilitated — made it very attractive — for us to join in." Devoting its final decade to a deliberate effort at building bridges with other funders has, in his view, paid off for both AVI CHAI and its projects, in ways that would not have happened but for that final ten-year effort.

The next three sections describe, region-by-region, my assessment of AVI CHAI's successes in building and solidifying its projects and the likelihood of their continuity beyond the Foundation's sunset. These successes should be read, more than anything, as the result of exceptional intelligence and insight, from a broad variety of skilled Trustees and staff members, harnessed to the steady pursuit of a bold but disciplined project of philanthropy.

PART II: ISRAEL

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. In its early years in Israel, the Foundation concentrated mostly on programs of formal and informal education, aimed at encouraging more- and less-observant Israelis into a deeper understanding and appreciation of Judaism and Jewish culture, and enriching the quality of Jewish studies in non-religious state schools. It then broadened its reach to embrace a wider trend toward rediscovering or deepening Jewish identity — a movement often called Israeli Jewish Renewal or Israeli Judaism.

Eli Silver, AVI CHAI's executive director in Israel, notes that elements of this movement were beginning to form before the Foundation arrived. Nonetheless, he believes, "We significantly contributed to making it a part of Israeli life and culture that is available, accessible, and heard." 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.

1. Pluralistic batei midrash and other programs of informal education.

By helping to create new, informal, flexible institutions for welcoming individuals to a fresh look into the texts that Judaism has long treasured, and by inviting participants without regard to denominational labels or historic affiliations to join in study and discussion of those texts under gifted, well-trained teachers, the AVI CHAI Foundation has provided venues for Israelis who seek a deeper understanding of Judaism to study with others of often-differing religious and theological outlooks. Over a period of about 20 years, a host of batei midrash (the Hebrew plural of beit midrash, a kind of religious study hall) have been established and have endured despite AVI CHAI's rapidly approaching sunset. Because of the widely varying mix of backgrounds of those who regularly study in the pluralistic batei midrash, many observers of the Israeli scene discern a yearning for discovering the many different ways of living and being Jewish in Israel and elsewhere.

I am convinced that one of AVI CHAI's most important initiatives has been its support for the founding and nurturing of batei midrash. Of those, Dr. Silver has identified the following as especially likely to make a lasting mark, including some that may well sustain themselves without further Foundation support:

- **ALMA**, founded by former M.K. Ruth Calderon, attempted a merger with the Shalom Hartman Institute of Jerusalem, but it was short-lived. Although ALMA then closed for a

time, Ms. Calderon has reopened it, resumed her role as leader, and begun pursuing financial support to cover the coming three years.

- **KOLOT** is a beit midrash based in the Tel Aviv area that focuses on leadership development for youngish professionals using Jewish texts to foster analysis and discussion. Kolot has become sustainable from its own fundraising.
- **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. The program was incubated jointly with **Kol Yisroel Chaverim**, or KIACH, and is now securely housed there. Two of AVI CHAI's programs to enrich Jewish learning in state schools, Morasha and Ma'arag, have also been merged into KIACH, which improves their likelihood of survival as well. KIACH receives continuing substantial support from the Paris-based 150-year-old Alliance Israélite Universelle and many of its wealthy donors and directors, as well as through recent grants from the Israeli Ministry of Education.
- **Pluralistic Pre-Army Mechinot** provide a diverse year-long curriculum including substantial courses in Jewish culture and religion. AVI CHAI supported their creation and expansion for roughly 15 years. Approximately 1,800 young, pre-army men and women enroll in those mechinot annually. They 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.

2. Initiatives to enrich Jewish learning in state schools.

As in North America, AVI CHAI has pursued multiple avenues of intervention in Israeli schools to help them incorporate a more meaningful and engaging approach to teaching Judaism, Jewish culture and history, and Jewish values. A 2019 summary for the Foundation Board described this line of work as "AVI CHAI's most enduring philanthropic investment, dating back to 1991 and encompassing 28 years of grantmaking." The Foundation devoted particular attention to secular state schools, where Jewish subjects have typically been relegated to a few hours a week at most and taught haphazardly, with few standards or models of excellence. It has also supported programs to refine teacher training, both in universities and through in-service mentoring and professional development, and pioneered programs to infuse Jewish culture into schools' overall approach to learning. In earlier years, the Foundation had also helped create a model of mixed secular-religious schools, catering to families that resist the hard dichotomy in Israel's education system, requiring most parents to choose either one kind of school or the other. Several educational initiatives now have at least a reasonable hope, and a few have a solid likelihood, of continuing beyond AVI CHAI's conclusion.

- **Morasha and Ma'arag**, mentioned above, are both AVI CHAI creations that seek to infuse Jewish culture and learning throughout the day-to-day functioning of non-religious state schools. Morasha emphasizes the diversity of Jewish culture, particularly in schools with many Mizrachi families, and Ma'arag focuses on embedding Jewish, Zionist, and civic education across multiple areas of school life. Both, as described earlier, have been merged into KIACH, which is committed to maintaining them.
- **Revivim**, based at the Hebrew University of Jerusalem, trains teachers in Jewish education and, in the language of the Foundation's website, "prepares teachers with

wide and diverse academic backgrounds to expose their students to Jewish culture in interesting, challenging, and significant ways throughout Israel's secondary school system." It is now sustainable by support from Hebrew University and by philanthropic support from an Australian foundation and other donors.

- **The Be'eri School of Education** at the Shalom Hartman Institute, supported by AVI CHAI at its inception, offers training for practicing teachers, classroom support, and curriculum development geared for high schools. As the end of AVI CHAI funding was approaching, Hartman recruited the Russell Berrie Foundation as a strategic supporter, and the program, renamed for that foundation, has continued to much acclaim ever since.
- **Mikranet,** a website 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 provides easy access to classical commentaries and online texts from the Bible, Mishna, Talmud, and Midrash. It has been enthusiastically adopted in the Israeli school system, which continues to support it.
- **Keshet**, Israel's first big-city mixed secular-religious school, was launched with support from AVI CHAI and the model was later greatly expanded by Tzav Pius, the AVI CHAI spinoff that promotes mutual understanding in Israeli society. Keshet is now well supported through normal government education funding, and the model has spread to some 40 schools in 25 communities across the country.

3. Efforts to spread Jewish culture and study throughout Israeli society.

AVI CHAI's flagship cultural initiative is its Jerusalem-based center, **Beit AVI CHAI**, which will continue to receive Foundation support after all other grantmaking ceases. The monumental building in King George Street presents a continuous stream of performances, lectures, exhibits, symposia, batei midrash, and other diverse cultural events. Other Foundation programs have also contributed to a spreading and deepening public appetite for Jewish cultural experiences, traditional observances, and expressions of Jewish values — on TV screens, in cinemas and concert venues, in community centers, and in other gathering places across the country. Many of these have credible plans for continuing beyond AVI CHAI's support.

- **The Gesher Film and Media Collaborative** was an already impressive initiative launched by AVI CHAI that was later joined by the Gesher Multicultural Film Fund. It has become a seminal force in the blossoming of Jewish content in movies and on television. The Foundation's website notes that "the film and television project has been joined by The Maimonides Fund, which is providing additional support that now assures its sustainability, along with support from the Gesher Multicultural Film Fund, for a significant number of years."
- **The Piyyut Website** and associated piyyut festivals, conferences, and musical publications are the fruit of a stream of AVI CHAI grants dating to 2002. The website (www.piyut.org.il) crowns years of AVI CHAI support for performances and gatherings centered on this form of traditional liturgical poetry, and now offers a wealth of background on the art form, including hundreds of piyyutim and thousands of recordings reflecting traditions of Jewish communities from around the world. The

websites are now part of the National Library of Israel and receive support from the Hebrew University and the Israeli government.

- **Nitzanim**, a network of Jewish communities across Israel, arose from various local programs of Israeli Jewish renewal and community development that AVI CHAI began supporting in 2004. The program, according to the Foundation's website, "works with local municipalities and communities to develop their vision and city-wide plan for Israeli Jewish education and culture." The AVI CHAI staff is currently negotiating a cooperative affiliation agreement for Nitzanim to become a program supported by the Israel Association of Community Centers, which would continue beyond the Foundation's sunset.

4. A project to open religious life to more diverse forms of experience.

Tzohar, according to a 2019 AVI CHAI report, is "a rabbinic organization devoted to training a new generation of Orthodox rabbis able to serve the broad spectrum of Israeli society." It is best known for its signature weddings initiative, which serves Israeli couples who want an Orthodox wedding but are resistant to the often forbidding process carried out by the government-licensed Orthodox Rabbinate. Tzohar has attracted more than 800 Zionist Orthodox Rabbis who volunteer to accompany couples throughout the marriage procedures, helping them sort out the many questions leading up to the wedding ceremony, which is tailored to the desires of the couple within the constraints of Jewish religious law.

AVI CHAI's support for Tzohar began when the project was scarcely a dream among a small group of young rabbis. Fifteen years later, when Foundation funding ended, Tzohar had become a nationally influential organization offering a wide variety of services and driving a fundamental discussion about religious moderation and dialogue. The group has increasingly succeeded in raising support from the public and from other philanthropies. As AVI CHAI funding declined in the last four to five years, Tzohar gradually replaced all Foundation support, and within two to three years after that support ended, the organization's budget had actually risen. Recently The Maimonides Fund has been making significant grants to enable it to broaden its range of services.

5. Late-starting initiatives for which the future is not yet predictable.

Beginning in 2014 to 2015, some six years prior to the sunset date, the AVI CHAI Israel program staff brought forward several new possibilities for significant achievements that they had not recently explored but that were ripe for tackling now. As budgets offered some latitude for further experimentation, the Board authorized these new initiatives, despite some anxiety over creating programs whose run time would be so short that their future would not be certain by the time AVI CHAI departed the field.

Prominent among these are programs for "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.

Similarly, an expansive effort to "nurture Jewish communities," with programs of Jewish culture and identity in community centers and other local organizations, has focused in particular on **moshav and kibbutz** communities around the country. Nitzanim, mentioned earlier, is also a key aspect of this line of work.

Finally, an unusual initiative called **Shabbat Unplugged** seeks 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.

All of these initiatives, as Eli Silver puts it, are still "kind of raw" — inspiring, intriguing, full of potential, but still too young to stand on sturdy legs. Asked if there had ever really been enough running time for these programs to develop, Dr. Silver acknowledges that the answer isn't clear. "In retrospect," he said, "you need at least seven years, and maybe longer, to really get something going." That wasn't available at the time most of these efforts were launched, but some signs are nonetheless hopeful. For example, with projects in the kibbutz movement, "We've set it up so that the BINA beit midrash organization is now taking over. And BINA is a very successful, secular-oriented organization that has shown it knows how to raise money." In other cases, however, he recognizes that the future is still a question-mark: "I don't know. We just don't know. We've done what we can."

REFLECTIONS ON IMPACT

If any AVI CHAI Israel insider might be justified in claiming great impact for the Israel program, it would be Eli Silver, who has been the Executive Director of that program since 1995. Yet, throughout my ten years of interviewing him, he has invariably taken a measured stance on its success. When I interviewed him in 2019, he acknowledged that the Foundation has managed to create a number of important and possibly enduring institutions, although several other of its best efforts probably have not resulted in long-lasting programs and organizations that, in themselves, will constitute an AVI CHAI legacy.

From a different perspective, however, he notes with satisfaction a human legacy — people whose lives have been deeply affected by Foundation-sponsored programs — that, while less tangible or visible than a new institution, may have farther-reaching effect on Israeli society over time. To illustrate this point, he tells the story of a tour guide — someone from an agency not selected by AVI CHAI — who was leading the Foundation Board and staff on a tour of Akko, the ancient port city on Israel's northern coast. Early in the tour, the guide mentioned that he'd recently been married, and it soon emerged that he had met his wife at a mechina — one of the mechinot supported by AVI CHAI. They were then married by a Tzohar rabbi, an experience they found so positive that the guide said, "My wife and I advise all our secular friends to be married by Tzohar rabbis." Dr. Silver has a host of such stories, from various acquaintances and chance encounters, suggesting a web of AVI CHAI-

supported programs whose influence intersects and multiplies in individual lives, and then passes on, through those individuals, to their families, communities, and organizations.

Research has borne out the message of these anecdotes. An AVI CHAI-commissioned study of the graduates of batei midrash, Dr. Silver noted, showed that "the world of batei midrash was truly the incubator for large numbers of people who, after studying there, have gone out, and you find them all around the world of Israeli-Jewish renewal." Moreover, he said, the researchers found that "the branding of Judaism, which allowed for Judaism to be seen as something that is accessible," has meant that it has ceased to be the exclusive preserve of the most strictly observant, and is increasingly seen as a treasure of the whole Israeli Jewish people, equally shared by traditional and secular. "I think we've contributed" to that branding, Dr. Silver concluded, "and have been an important part of creating it."

PART III: NORTH AMERICA

The largest share of AVI CHAI's annual grants budget has been dedicated to its program in North America, where the emphasis has been 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." Given the many possible ways of pursuing that mission, AVI CHAI recognized early in its history that focusing on only the most potentially powerful leverage points would be indispensable. In the early 1990s, analysis of data from the recent National Jewish Population Survey pointed squarely to day schools as the most effective route to greater "understanding, appreciation, and practice." Specifically, at least nine years of day school education appeared to be the most reliable way to ensure that a young person would grow to pursue a knowledgeable and committed Jewish life. Further research by Dr. Marvin Schick, a distinguished professor of political science and constitutional law as well as, for 30 years, the volunteer President of the Rabbi Jacob Joseph School in New York City, detailed extensive needs and weaknesses in the day school field, but also areas of growth and many opportunities ripe for Foundation action.

For those students not attending day schools, the next most influential route to Jewish learning and observance was overnight summer camping. There, the Foundation concluded, the educational and social environment offered rich possibilities for nurturing young people's Jewish identity, although such opportunities were little pursued at most camps. On those two types of Jewish institutions, AVI CHAI focused the overwhelming share of its North America budget and its staff's knowledge, energy, and creativity.

Surveying the roughly 25 years of grantmaking devoted to this strategy, what strikes me as critical was AVI CHAI's willingness to support diverse, multiple means of improving learning outcomes in day school, all at the same time. These include the development of new

curricula in the Hebrew language and in Jewish Studies, training programs for teachers and principals, as well as 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.

Other branches of this wide-ranging work encompass the Prizmah Center for Jewish Day Schools, which provides extensive capacity-building assistance in such areas as human resource development, fund-raising, governance strengthening, board-building, communications and marketing, and evaluation; the Building Loan Fund for Jewish day schools physical renovation and/or expansion (as well as a comparable similar fund for overnight camping physical renovations); and the pioneering MATCH campaigns to match contributions of new money to existing day schools. And these are just the major initiatives; many other grants pursued special opportunities or sought to solve problems separate from — though usually still related to — the main lines of support for day schools and camps.

Of this large body of work, these are the projects that now seem likely to thrive beyond AVI CHAI's departure:

1. Strengthening Jewish day schools — Jewish Studies and Hebrew language curricula

In a 2019 interview, Arthur Fried summed up AVI CHAI's day school mission this way: "Think of the importance of day school education as not just to Jewish continuity, but to a stronger Jewish community, [in which young people are] more conversant with their sources, their values, and their God. … That's a religious commitment to the literacy and the people, with a deep connection to Israel." In 2006, the Foundation codified this vision with the initials LRP, representing efforts to cultivate Jewish **L**iteracy, **R**eligious Purposefulness, and **P**eoplehood.

Many projects, perhaps most, served more than one of these three objectives. For example, the elementary-school Hebrew language program **TaL AM** thoroughly wove the study of Hebrew into immersive lessons in Jewish heritage, including history, culture, holidays, and the state of Israel — thus squarely targeting Peoplehood as well as Literacy, with a measure of religious purposefulness, or at least tradition, as well. The corresponding high school Hebrew curriculum, originally known as NETA and now as **Bishvil Ha'Ivrit,** similarly struck a blow for Peoplehood by emphasizing conversational fluency in the language of Israel and the Jewish people worldwide.

Both of these programs now appear to have secure homes from which to persevere beyond AVI CHAI's support. After more than two decades of development and rapid adoption in hundreds of day schools worldwide, the Foundation helped TaL AM to transform its print curriculum for grades 1-4 into what AVI CHAI's website calls "a unique, digital interactive blended-learning program, called **iTaLAM**, that combines the benefits of both print and digital learning models." At the time this is written, the print or online curriculum is being used in 350 day schools in all countries where Jewish day schools exist. Working with the founders of TaL AM, AVI CHAI helped to broker a partnership with Compedia, an Israeli for-

profit corporation with significant experience in digital gaming for educational purposes. As a result, iTaLAM now lives on in a non-profit joint venture with a company with the technological expertise to preserve and keep it up-to-date. And it appears to be secure in its funding with income earned from schools using the program augmented by philanthropic support. Canada's Azrieli Foundation has recently announced a $5 million grant for iTaLAM for the development of materials for the fifth grade.

Bishvil Ha'Ivrit is now part of Israel's Center for Educational Technology, which is providing infrastructure and business oversight that seems likely to ensure the program's sustainability. As in the case of iTaLAM, AVI CHAI took a leading role in helping broker and launch this partnership and in supporting other adjustments to the program to make it attractive to a larger number of schools. It now reaches close to 20,000 students, grades 6-12, in more than 175 schools worldwide.

2. Strengthening Jewish day schools — training and mentoring educators

AVI CHAI has supported multiple methods of helping teachers and school leaders hone their skills and deepen their reserve of Jewish knowledge. Most of these resulted in resources for teaching, support for educators, and standards of excellence that had not existed before AVI CHAI's intervention. Yossi Prager, in a 2019 interview, pointed out that a survey of the day school field before the 1990s, "found very little in the way of principals' training aside from degree programs that attract small numbers. There was nothing in the way of teacher mentoring, though there were pre-service programs. There were no standardized curricula of any kind." Although there were many fine schools and some quality teacher-training programs, he added, "there hadn't yet been a *system* — and I think that we helped contribute to the systemization and professionalism of the day school field." Among the Foundation's contributions to that system, three seem particularly well situated to continue without further AVI CHAI support.

- **The Jewish New Teacher Project**, part of the California-based New Teacher Center, "accelerates the effectiveness of beginning teachers' classroom practice through high-quality, intensive mentoring" by veteran educators, according to the AVI CHAI website. It is a perfect example of the Foundation's vision and resourcefulness in identifying specific needs in Jewish day school education that could be satisfied by an alliance with an existing nonprofit organization meeting that same need in the secular world. In this case, the New Teacher Center is a nationally renowned program providing mentoring to new teachers in the U.S. public schools. In 2001, AVI CHAI approached NTC's director, Ellen Moir, who is Jewish but had not been much involved in communal organizations, and asked if she would be willing to create a version of the New Teacher Center tailored for Jewish day schools. The result, 18 months later, was the Jewish New Teacher Project, which offers professional mentoring by veteran educators for teachers in their first years on the job. The AVI CHAI website reports that "Beginning with AVI CHAI's sunset, the Jim Joseph Foundation has committed itself to continue funding JNTP for the coming three years." Together with contributions from other philanthropies, the Jim Joseph support offers a solid platform to sustain the project.

- **The Principals Center at Harvard University** is a longstanding training institute for school leaders. AVI CHAI funded the participation by day school leaders and enriched the experience with a new component tailored to Jewish schools. One of Harvard's weeklong summer programs offers fundamental leadership training for professionals in their first five years as day school leaders. The second program is tailored for more seasoned school leaders. An anonymous funder has agreed to continue support day school participation after AVI CHAI's sunset, beginning in 2020.

  The Graduate Program for Advanced Talmudic Studies for Women (GPATS) at Yeshiva University, traces its roots to a pair of AVI CHAI grants in 1998 and 1999 that ultimately paved the way to a distinguished postgraduate program for women, including the possibility of earning a Master's degree, covering Talmud, Chumash, and Tanakh. The idea was conceived and championed by Yossi Prager and Rachel Abrahams of the AVI CHAI staff and by Trustee Lauren Merkin, with solid support from the rest of the Board. Unprecedented in the Orthodox world — and initially received only warily by Yeshiva University — the program now has achieved a degree of institutional stability and prestige there, with the majority of the graduates becoming day school teachers. AVI CHAI exited the program in 2008, and it has continued successfully since then.

3. Overnight Jewish camping

The overwhelming consensus of views expressed by those I interviewed for this report is that AVI CHAI's Overnight Jewish Camping initiatives were a great success. Foundation executives outside AVI CHAI whom I interviewed shared that conclusion — a significant fact, given that these judgments come from people who have joined in funding some of these programs and may continue to do so. The Foundation's efforts in this field have been marked by vision, creativity, and consistently pioneering work. Best of all, Jeremy Fingerman, CEO of the Foundation for Jewish Camp, affirmed to me that other philanthropic donors have committed funds to replace some of AVI CHAI's existing support for camping initiatives for the time being.

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.

"At this point" is a major qualification of that conclusion. While it is true that other philanthropies have agreed to replace some of AVI CHAI's existing commitments for parts of the Foundation for Jewish Camp overnight camping program, it is not necessarily the case

that they will go on supporting those initiatives once their existing commitments end. As he was completing his service at AVI CHAI, Joel Einleger, the Foundation's senior program officer in charge of the camping programs, acknowledged to me "that some programs are in very good financial shape and that others we will have to wait to see in the future."

The circle of people who now share AVI CHAI's desire to intensify the Jewish experience at summer camps — with richer programs, better trained counselors and program leaders, and a general commitment to infusing the whole camping experience with Jewish content — is markedly larger than it was when the Foundation started working in this area. Still, Mr. Einleger cautions, "In the end, we have to hope that we've convinced enough people that what we've been doing is both right and worth continuing. … I don't think we can do much other than hope. I hope we've laid the right groundwork. And I hope that in the future, people will continue."

In several areas of the Foundation's camping program, that hope appears well justified, at least for now:

- **The Foundation for Jewish Camp** is the umbrella organization for Jewish overnight camping in North America. It grew out of a vision and a passion shared by Elisa and Robert Bildner, who founded the organization in 1998. It was initially supported by a small number of foundations and philanthropists, among whom the AVI CHAI Foundation provided the then-largest grant in its early history. That pioneering investment, added to its subsequent grants, makes AVI CHAI FJC's most critical early backer. The organization's circle of supporters has grown ever since, including large grants for general and specific purposes from foundations both large and small.

- **Cornerstone** is one of the signature, targeted FJC programs that AVI CHAI support made possible. It provides training for returning bunk staff and professional development for camp leaders, all 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.

- **Building Loan Fund** for camps, which AVI CHAI established in 2004, helps to finance construction and renovation projects that expand camper capacity or that upgrade camps' accommodations or facilities. Just as it had done to support day school construction, renovation, and expansion, AVI CHAI saw a comparable need to help provide resources to upgrade the quality of physical facilities of overnight camping. A separate revolving building loan fund was created to meet that need and, after AVI CHAI ceased making loans in advance of its sunset, the Maimonides Fund provided new capital for the program, thus ensuring its sustainability.

4. Possible Successes, but too early to tell

Several other AVI CHAI initiatives in North America show promise as the Foundation completes its grantmaking, but their futures depend on financial or organizational developments whose outcomes are not yet clear. These include:

- **Prizmah** is a union of day school umbrella groups that provides various services and networking opportunities for a wide array of schools representing every Jewish denomination. Key areas of Prizmah's work, according to the AVI CHAI website, include "deepening talent of teachers and other staff; catalyzing resources; accelerating innovation; and providing opportunities for day schools to network with each other." The organization was created at the instigation of the Jim Joseph Foundation with extensive support, including both operating grants and hands-on organizational development, from AVI CHAI. Without question, Prizmah is a major step forward in achieving cross-denominational cooperation among day schools, and the willingness of those two foundations to commit major resources in the short run has been heroic. Moreover, the Prizmah leadership is energetically pursuing financial resources from other donors and is making excellent progress in receiving it. However, it still remains unclear whether there will be enough support from other sources to sustain Prizmah over the long run.

- **The Pardes Day School Educators Program**, the flagship program of the Pardes Center for Jewish Educators, has been 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 (MJEd) from Hebrew College for aspiring day school teachers in North America. Additional funding from the Jim Joseph Foundation will outlive AVI CHAI, but that support is declining. Additional support comes from a three-year grant from an anonymous foundation, but that covers less than half the program's total cost. This, like Prizmah, is a program that plainly deserves to continue, but major challenges still lie ahead.

REFLECTIONS ON IMPACT

In a long reflection on AVI CHAI's influence on the day school field, Program Officer Susan Kardos told me in 2019 that the Foundation "brought to bear standards of practice and working theories about schools as organizations, and about Jewish education, and about general education, and about the running of Jewish schools — brought those standards of practice and working theories, and elevated those conversations across schools." Other members of the staff noted with pride the consequences of AVI CHAI's persistent emphasis on setting and raising standards of quality, enriching professional training and mentoring, and developing first-rate curricula for Hebrew language and Jewish studies. These efforts, sustained over a quarter-century, have unquestionably elevated both teaching and learning in Jewish day schools — a change felt well beyond the educators and schools that the Foundation directly supported.

Similarly, in overnight camping, many of the people I interviewed argued that a bar had been raised in the way camps thought about and carried out their Jewish mission. A generation of leaders has now been steeped in the principle that campers should not merely be offered a Jewish program or two, but should enjoy a thoroughly Jewish experience in which language, culture, history, and textual study permeate their time in camp. Whether this change in expectations is permanent is still impossible to know. But there is no doubt that the camp leaders and counselors who have taken part in this transformation will remain influential long beyond AVI CHAI's grantmaking life and will have time and opportunity to influence others who come after them.

Newly created programs and organizations, plus raised standards of performance, constitute two distinct kinds of impact that AVI CHAI brought to the fields on which it concentrated in North America. Some of the programs and organizations 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.

PART IV: THE FORMER SOVIET UNION (FSU)

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 supporters to join in supporting these efforts. In 2011 and 2012, near the cessation of AVI CHAI grantmaking in the FSU, that program saw major new five- and six-figure grants for other AVI CHAI projects. Major past support from the Jewish Agency/Israel Ministry of

Education, the Genesis Foundation, the Leviev Foundation, Rothschild Foundation Europe and local Russian Jewish donors was renewed. Smaller grants, both new and renewed, were received from other sources as well. All told, the contributions amounted to $850,000 in 2011 and more than $2 million in 2012, providing some opportunities for growth and a reasonable hope of continuity for many AVI CHAI-sponsored projects.

Not every outstanding project is sure to survive, of course. For example, two related literary web sites — **Booknik.ru and Booknik Jr.** — grew steadily since the first pilot site launched in 2006. Booknik describes itself as a Russian-language Internet portal that is designed "to appeal to a wide, diverse, but largely unaffiliated Russian-speaking Jewish audience" that focuses "on Jewish and Israeli history, religion, society, and thought; Jewish literature, art, music and culture; Jewish people and places; Jewish philosophy, ethics and the Jewish spirit; with a special separate site section for children and family reading." Unfortunately, Booknik's private funder ended up pursuing other philanthropic interests, and the project could not survive his departure.

However, **Eshkolot**, another program aimed at young, university-age but largely unaffiliated Jews, has fared better. It comprises a mixture of in-person and online events and programs of Jewish study, along with a website that offers videos of the live events, plus study materials and links to other sources. After only four years, the Eshkolot website grew from 600 to more than 4,800 monthly visitors. A related program, **Eshkol**, also offers programs on Jewish literature and culture, many of them at popular Moscow intellectual clubs and cafes, as well as programs for families. The Eshkol website now averages 8,400 visitors a month.

Several **book publishing programs** have by now sold well over half a million books on Jewish themes, spanning fiction, nonfiction, and illustrated books for children. A major local funding partner has granted $750,000 to inaugurate, together with AVI CHAI funding, the Jewish and Israeli History Series in the Russian language, which will be named in his family's honor. Wealthy individuals have also contributed to other of the Foundation's book-publishing series. David Rozenson, who founded and led the FSU program for AVI CHAI and is now director of Beit AVI CHAI in Jerusalem, regarded the mission of this initiative as not just creating Jewish books, but opening the whole Russian literary market to important Jewish authors and texts. "Translations need to be top-rate," he said, "the books need to be aesthetically well produced and, most importantly, they need to be available to Russian readers in regular bookstores in cities across the former Soviet Union. People were telling me that what they needed was a 'Jewish corner' [for literature] in Jewish organizations, but we strongly disagreed. I don't want the 'Jewish corner.' I want it to be part of world literature. And that's where we placed them."

AVI CHAI was also committed to strengthening and enhancing the Jewish character of 30 **Jewish day schools** in 18 cities, which are predominantly supported by the Israel Ministry of Education, as well as by other funds from Western and Israeli sponsors and organizations. The Foundation's modest budget of $700,000 for this line of work was therefore aimed at specific improvements in curriculum and content, including the introduction of TaL AM, rather than basic, bread-and-butter support.

However, the Israel Ministry of Education and the Jewish Agency for Israel expect to cut back their respective support for schools in the coming years, as do several Russian philanthropists. So AVI CHAI has launched an FSU **Jewish Day School MATCH Program,** modeled on a similar initiative in North America, with two major gifts from local donors, in addition to its own funding. Other donors are being recruited and several have expressed interest.

Among AVI CHAI's signature efforts in the former Soviet Union has been its support for **academic Jewish study at the university level**. Results include the establishment in 2005 of an official Department of Jewish Studies in Moscow State University and in 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 latter was given the authority in December 2011 to award M.A. and Ph.D. degrees, and 50 percent of the department's annual budget now comes from the university and the State. Moscow State is now providing the bulk of the cost of maintaining the Department and its 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.

The establishment of these elite programs has helped draw the attention of a wider circle of potential donors. David Rozenson believes that the two new departments will have a ripple effect on other universities. "Once Moscow State University had a Department of Jewish Studies with full-time academics—associate professors and younger professors—then the doors would be opened at university-level programs across the FSU," he told me.

The involvement of funding partners in all aspects of the Foundation's work in the FSU was a distinguishing feature of that program. AVI CHAI Trustee George Rohr, who has deep business and philanthropic roots in the former Soviet Union, believes the Foundation — and David Rozenson in particular — made a significant mark there thanks to a constant pursuit of partners and successors, despite many difficulties. "It's remarkable and stunning," he said, "for all of us to see how much harder it is there [in the former Soviet Union] than it is here [in the United States]." He adds that Dr. Rozenson has been adept at identifying possible partners whom "he understands well and knows what will resonate with them within our portfolio. Then he thoughtfully brings them in and exposes them to it, and exposes to them others who are already AVI CHAI partners. ... For them, it's no longer just writing their check and getting their name on it, which it was at the beginning. Now it's writing a check, getting their name on it, and then worrying about the well-being of the grantee."

When the AVI CHAI Foundation announced in 2005 that it would end its grantmaking programs at the end of 2019, it was a foregone conclusion that the program in Russia would be the first to be phased out gradually. It was, by far, the smallest of the three geographic programs, with an annual total expenditure of between $4 and $5 million, and with a tiny staff compared to the much larger programs in Israel and North America. Given its lean size, compared with the vastness of the need, the Russian program had no choice

but to raise money from partner individuals and foundations from its inception if it was to get the job done. Ironically, its disadvantage in size gave the FSU program a valuable incentive to draw in other sources of funding early, thus leaving behind a strengthened field of Jewish philanthropy to carry on the work.

"If AVI CHAI had stayed in Russia," Dr. Rozenson concludes, "we would have continued working. Since the decision to leave was made, I think we exited carefully and as well as we could. But, certainly, it would have been very different if we had stayed. There is a tremendous amount of work still to do."

PART V: STRATEGIC CHOICES

The Uniqueness of AVI CHAI in the World of Jewish Foundations

As I interviewed people for this report, most observers focused their comments on one or more of AVI CHAI's important substantive contributions: the creation of a new institution, or the development of ways of strengthening the effectiveness of existing institutions, or the creation of better-trained teachers or day school heads, and the like. Most of these have been noted above. I would like to cite four non-substantive contributions that, in the long run, may well lead to more effective philanthropic institutions that function more effectively across the whole wide range of innovation in Israel and in Jewish philanthropy elsewhere.

One is AVI CHAI's decision in both Israel and North America to engage in the **capacity building** of grantee nonprofits in order to help them do their philanthropic work more effectively. Another is AVI CHAI's decision to pioneer in conducting state-of-the-art **research and evaluation** of grants and grantee performance at a level of quality and in a wholesale commitment to apply such research and evaluation to most of its major initiatives. This unwavering commitment to evaluation is exceptional among foundations everywhere, but it is particularly groundbreaking in Israel. My impression is that, with the exception of Yad Hanadiv, which also has a commitment to research and evaluation of high quality, the AVI CHAI Foundation has alone among Israel foundations set a high bar for employing such measures of foundation performance, a practice fully consonant with Zalman Bernstein's strong value commitments to research, evaluation, and accountability.

A third distinctive feature was AVI CHAI's initial decision to choose and pursue projects **without seeking or expecting other funders' support**. This practice changed sharply, as I described earlier, around 2010 — and it was never characteristic of the Foundation's work in the former Soviet Union. But in North America and Israel, for the first quarter-century of grantmaking, AVI CHAI took a go-it-alone approach to identifying needs, devising possible solutions, and developing and testing those solutions in the field. This unusual practice had some drawbacks — not least that it often became more difficult to recruit

funding partners later, when projects were thoroughly branded as AVI CHAI creations and other sources of support felt little ownership or kinship toward them. But it had advantages, too, and that is a point I want strongly to make in this last report.

AVI CHAI has been able to do some exceptional, imaginative things in precisely the way it wanted to do them. It was able to prove both need and opportunity in field after field where, had it relied on the agreement of others, it might never have been able to make a mark, or might have been forced to dilute its ambitions to compromise with other points of view. In realms such as online and blended learning in North America or collecting and promoting piyyutim in Israel, AVI CHAI stepped into areas of work in which few or no other funders had taken any interest, and in which there was hardly any organized "field" of activity with which to start. Finding ways to stimulate activity and make progress in these areas, and then carefully testing and documenting the progress that it made, gave the Foundation the wherewithal to imagine and create, and not merely support, critical resources that furthered its mission.

This is not only my view; it is shared by, among others, Mark Charendoff, president of the Maimonides Fund, whom I quoted earlier. There are clearly some things that he feels AVI CHAI could have done better if it had had sought partners sooner. But some significant achievements have clearly benefited from having a single, focused, dedicated funder willing to set a vision and stick to it. That approach, in several areas, is now being validated by other institutions, including Maimonides, that are stepping in to participate in and sustain the funding beyond AVI CHAI's life.

"In all of these projects," Mr. Charendoff told me, "AVI CHAI spent a fortune, and a lot of hard work, and made a lot of mistakes along the way. And then we could just come in. … So there's a huge financial advantage for us in that."

The fourth element that makes AVI CHAI unusual, if not unique, among Jewish philanthropies has been its **tolerance for risk** — a willingness to stake large sums, and ultimately its legacy, on big, far-reaching goals whose achievement was far from certain. For a foundation determined to spend out its wealth in a fixed period, this willingness to embrace difficult, sometimes distant goals, against formidable obstacles, subject to the unforgiving deadline of a fixed end-date, has been especially remarkable. Because the goals in question were different in each of the three geographies, I believe it's worthwhile to consider them separately.

1. North America: Imparting *Emunah*

We live at a time in history when, worldwide, strong socio-cultural headwinds are buffeting all religions with apparently increasing velocity. Opinion surveys steadily reveal declines in religious beliefs of all kinds, including belief in the existence of God, declining affiliation with houses of institutional worship, and declining regular attendance in religious ceremonies of worship. Moreover, the ever more pervasive and insistent peer networks and popular culture — television, cable, social media, gaming, texting, YouTube, Google,

Facebook and others — combine to make it difficult, if not impossible, for parents to be as effective as they had been in earlier generations in shaping the minds of their children.[2]

And, of course, both of those worldwide phenomena are having comparable, if not more severe effects on America's Jewish parents. Alongside those external forces, marriage patterns among Jewish Americans make the challenge of sustaining belief and tradition in the family all the more difficult. Decades of rising rates of intermarriage — as high as 71 percent of non-Orthodox marriages, in one recent survey — have meant that more and more families have to navigate a thicket of emotional and cultural issues in order to raise their children as Jewish, even if they choose to do so.

Even parents seeking to learn more and take an active role in Jewish life — indeed, even those willing to enroll their children in a full-time Jewish education — find themselves running into ever greater resistance. Some of this is the result of a growing propensity of school authorities to constrain the curricula and scheduling of religious instruction in private schools. But some is also the result of educators' desire to devote more and more time to academic subjects critical for admission to elite colleges and universities. Thus, even in the relatively "safe" world of Jewish day school education, the time and resources devoted to teaching Jewish religion, tradition, and culture find themselves pressed on all sides by countervailing forces.

Holly Cohen, then executive director of the Kohelet Foundation, whose grantmaking has been influenced by AVI CHAI, expressed a profound frustration with this state of affairs when I interviewed her in 2019:

> I am incensed at how Jewish day school teachers will not talk to kids about God in the classroom. It's like they're afraid to talk about God. So they want you to do this, and they want you to do that, and they want you to learn this, and they want you to learn that, but they keep forgetting to say, W*hat for*? *Why?* So we, the Mayberg Foundation, and AVI CHAI created a text to a Relationship-with-God program, one of the aims of which was to bring forward the conversation about how God is still missing in our schools. If you ask, "What's the goal of these schools we are building or strengthening," what I would say is this:
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> Obviously, I want the kids to get all of the scholastic skills that they need, at a high level, a good level. But I want every single one of the children who goes to one of these new schools that we're creating, when they leave there in eighth grade, to have a personal relationship with God. And I want them to know what they're doing, here in this world and in their lives. And I want them to know that they are special, that God put them here for a reason, and that everything they do is in service of their Godly mission. And they could become quantum physicists or cure cancer, or be a teacher, or work in a supermarket, or own a corporation. I don't care. But somehow or other, you've got always to be asking yourself the question "What does God want from me in this particular role?"

Instead, as the Orthodox Union reported this year, something close to the opposite is happening in many Jewish classrooms. Even young people with a solid Jewish education

[2] Patti M. Valkenburg and Jessica Taylor Piotrowski, Plugged In: How Media Attract and Affect Youth (New Haven and London: Yale University Press, 2017 accessible at https://yalebooks.yale.edu/sites/default/files/files/Media/9780300228090_UPDF.pdf.

find themselves less secure in their knowledge and commitment to Jewish belief than might be expected:

> A group of young Jewish day school graduates—all of whom were raised in Orthodox homes—were recently asked about their belief in God. Not a single one could explain why he believes in God or why believing in the Torah differs from believing in any other belief system. Imparting *emunah* has never been a simple matter. But in the post-modern age of Instagram and ever-present distractions, instilling in our youth a deep and abiding faith that will guide them through the inevitable vicissitudes of life is more challenging than ever. How can we bring God into the classroom, into our homes, and, most importantly, into our children's hearts and minds? [3]

Admittedly, circumstances were less grave when AVI CHAI entered the field in the 1990s with a commitment to fostering Jewish literacy, religious purposefulness, and a commitment to peoplehood among young Jews, primarily through day schools and summer camps. Even then, worrisome trends were already visible, and the environment was nonetheless heavy with risk. But the Foundation's decision was driven partly by what seemed, at the time, an encouraging trend toward day school education among all branches of Judaism, and by a general longing for cultural identity among young people generally, which seemed to open wider avenues of inspiration and education of young Jews. Still, it was by no means certain that this growth spurt among day schools would continue, or that countervailing pressures of secularism and multiculturalism would not ultimately prevail.

Indeed, those hostile pressures did strengthen over time, thus underscoring the risks the Foundation was confronting from the outset and leaving the current environment less hopeful than in the 1990s. But no matter — the positive trends were never more than an invigorating background to a far more compelling reason for AVI CHAI to invest in day school education and summer camping, despite the risks: the Foundation's mission, "to encourage those of the Jewish faith towards greater commitment to Jewish observance and lifestyle by increasing their understanding, appreciation and practice of Jewish traditions, customs and laws." Confronted with research showing that the single greatest factor leading to a committed Jewish life was at least nine years of day school education, or failing that, at least participation in summer camping, the Foundation devoted virtually all its available resources to schools and camps. It developed a complex, multifaceted strategy that ultimately encompassed almost every aspect of Jewish learning and engagement available to these two kinds of institutions.

It then continued to refine the strategy, testing opportunities, withdrawing from unsuccessful efforts and doubling down on successful ones. In little time, this became a full-body press on the ecology of Jewish day schools and overnight camping, with financial and intellectual resources all trained on key leverage points in each field. Over the course of two decades, the Foundation strengthened a host of interrelated and mutually reinforcing institutional components of Jewish education, identity, observance, and peoplehood.

[3] Jewish Action: The Magazine of the Orthodox Union, Summer 5779/2019, page 54.

This is anything but a standard approach to philanthropy. Instead of investing only in the strongest and most active areas of activity, or pursuing goals on which other philanthropies were available to share the burden, as many traditional foundations would do, AVI CHAI plunged into aspects of Jewish education and youth programming that were struggling or nonexistent. It created whole realms of enterprise virtually on its own, on terrain where few if any other donors had ever dared (or even wished) to venture. This reflects a fidelity to mission, married to a boldness of spirit, that honors the passion with which Mr. Bernstein created the Foundation in the first place.

The Foundation's passion for conveying not just the intellectual foundations of a Jewish life, but its heart and soul as well, calls to mind an observation made by the great 19th Century Jewish leader of Orthodoxy in Germany, Rabbi Samson Raphael Hirsch. In his commentary on Genesis 8:21 ("And God noted the expression of compliance [with his will], and God said unto his heart, I will not again curse the ground any more for the sake of Man when the images formed by the heart of man are bad from his youth, neither will again smite any more every living thing as I have done"), Rabbi Hirsch observes the following:

> The danger of getting some corporeal conception of God is by far not so great as that of volatilizing Him to a vague, obscure, metaphysical idea. It is much more important to be convinced of the personality of God, and of His intimate relations to every man on earth, than to speculate on the transcendental conceptions of infinity, incorporeality, etc. which have almost as little to do with the morality of our lives as algebraic ciphers. Everything which, in human beings, attaches them to the creatures around them, and especially to those near to them, is here, in God, epitomized in the expression HEART.

2. Israel: Nurturing Israeli Judaism

The goals of AVI CHAI, as spelled out in its mission statement, are broadly uniform across all three parts of the globe where the Foundation worked. However, in the fraught cultural environment of contemporary Israel, where differences in attitudes toward religion have been a simmering source of tension, it is the second half of Mr. Bernstein's founding ambition that has taken center stage: "to encourage mutual understanding and sensitivity among Jews of different religious backgrounds and commitments to observance." As a long strain of research has shown, Jews in Israel are not actually as starkly divided between traditional observance and secularism as the common caricatures imply. But the Foundation was justly wary of doing or saying anything in Israel that might suggest that its goal was to push people into forms of observance that they do not want. Accordingly, the Hebrew text of its mission statement takes a more neutral tone in its references to "Jewish traditions, customs and laws" than does the English equivalent. In Hebrew, the Foundation describes its work in Israel as nurturing "an affinity for tradition amongst all parts of the Jewish people, and to encourage understanding and appreciation of the Jewish heritage, its culture, its laws, its customs, and its values."

The result in Israel is not a Foundation program without religious roots or ambitions. But it is one in which the prevailing vision is of harmony among people of every level of observance, and a society in which the differences among various cultures and traditions, various ways of living a Jewish life, enrich and solidify Jewish identity across all strata of

Israeli society rather than dividing it. This expansive vision encompasses all sorts of venues for informal education and service among both adults and youth, formal Jewish education in state schools, mixed religious-secular schools, and an approach to Israeli communal life infused with Jewish learning, tradition, and values. It promotes vigorous education, both formal and informal, in Jewish history, texts, culture, civics — and, yes, religion. And in Beit AVI CHAI, this vision has solidified into a figurative temple dedicated to multifaceted Jewish culture — a building bookended by the Jerusalem Great Synagogue and the Yeshurun Central Synagogue, but festooned with posters for modern cultural and intellectual programs that appeal as much to the purely secular as to the devout, and to the vast majority in between.

In an environment where secular and religious voices in the media, online, and in politics tend to emphasize division and distrust — where some secular figures warn of a sinister campaign of religious infiltration (in Hebrew, *hadata*), and religious leaders discern Godlessness even among people who consider themselves observant — AVI CHAI's mission of *pius*, understanding, and common identity is nearly as countercultural, in its way, as is its North American drive to promote religious purposefulness among young Jews.

The Foundation's efforts to build bridges and forge bonds of unity in Israel extend not only to religious differences, but also to the many cultural backgrounds of Israeli Jews — particularly the Ashkenazi who came to Israel from Europe and the Sephardi whose background is in the Middle East and North Africa. Here, too, although the issues may not be as overtly divisive as those involving religion, the obstacles to success may be just as formidable, rooted as they are in thousands of years of history, geographic dispersion, and mutual misunderstanding.

To make matters all the more difficult, for most of its history in Israel, AVI CHAI has operated without a surrounding environment of indigenous Jewish philanthropy, skillful nonprofit fundraising, or even much support for the essentials of nonprofit management, governance, and networking. Most of the strategic philanthropy in Israel (as opposed to direct charity) tends to originate from elsewhere, primarily North America. As a result, in an environment where most funding for educational and social causes comes from the public sector, the Israeli government's recognition and willingness to partner with philanthropy would have seemed to be critical. But in reality, it has been only halting and unstable — largely dependent on the openness of any particular Minister, at any given moment, to cooperating with a philanthropic partner. In short, with a mission that has often run starkly counter to prevailing trends, without much public or government understanding of the Foundation's role (or, in some cases, the role of any foundation), and in an atmosphere still troubled by mistrust and tendentiousness, AVI CHAI has chosen to press ahead on multiple fronts in a campaign to advance solidarity, understanding, inclusiveness, and a shared Jewish identity.

3. The Former Soviet Union: Rekindling Jewish Culture

In Russia and Ukraine, where AVI CHAI concentrated most of its work in the former Soviet Union, it might at first seem that the winds of societal and communal change were blowing solidly in the Foundation's direction. After 70 years of deliberate state suppression of all

ethnic and religious identity, a hunger for renewed self-discovery among many ethnic minorities, and certainly Jews, was prompting new thinking and activity in many aspects of education, culture, and social life. AVI CHAI's entry into this landscape was in some ways like adding fuel to an already-moving engine.

Still, even in this seemingly favorable environment, AVI CHAI's choice of activity also ran headlong into contrary forces and structural impediments that might have given any foundation pause (and did, indeed, trouble some members of the AVI CHAI Board, who nonetheless deferred to the greater optimism of their colleague George Rohr, an entrepreneur with long experience and extensive networks the region). For starters, although the desire to rediscover Jewish roots was widespread, it was not especially deep. After two or three generations with scant opportunity to learn or practice Judaism, most post-Soviet Jews were starting with minimal understanding of their background and little by way of cultural reinforcement for living a committed Jewish life.

Meanwhile, at least as much as in the rest of the modern world, the trends toward secular, multicultural lifestyles were powerful and widespread. Intermarriage was even more prevalent than in North America. Enrolling children in a Jewish day school in Russia or Ukraine, devoting one's academic career to advanced Jewish study, adhering to Jewish observances and holidays, or even just committing regular time to Jewish educational or cultural programming would in essence be countercultural acts that would require exceptional determination and willingness to choose a less-traveled path in life.

As it did in North America and Israel, AVI CHAI sought to widen that path with a mixture of programs and approaches that appealed to people of all levels of knowledge and commitment — including the most minimal. It sought to expand the number and elevate the quality of day schools, making them a more attractive option for Jewish families and a richer font of Jewish learning for children. It pushed to raise the stature of Jewish study at the university level, pressing against entrenched biases and institutional habits that had long relegated such activity to the academic periphery. And for those whose interest in Judaism might still be tentative and unanchored, it sponsored lively literary and cultural programs, both in social venues and online, that demanded little advance knowledge, but that opened worlds of Jewish thought, heritage, and creativity to new (and, significantly, young) audiences.

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 the time to fuel decades of effort, which some of its boldest ambitions in the region would have required. Nonetheless, it sought to spark activity and kindle enthusiasm in ways that had a chance of continuing, even growing, after the Foundation's 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.

PART VI: HUMAN ASSETS

AVI CHAI's Investment in Its Staff and in Leaders Throughout the Field

Noting that a foundation's philanthropic resources are not limited to money alone, several of the people I interviewed made a special point of praising the long-serving members of the AVI CHAI Board and staff, whose talent and dedication they considered outstanding. In a similar vein, several people commented on the Foundation's support for human talent more broadly — in its eye for spotting outstanding innovators whose projects the Foundation backed, and in its determination to cultivate rising young leaders who would influence the future of the Jewish people. Several observers thought of this "human legacy" as likely to be far more consequential, over time, than any one program or project. They cited such initiatives as the school and camp leadership programs in North America, batei midrash in Israel, and literary and cultural programs in the former Soviet Union — projects aimed squarely at inspiring and educating people who would, in turn, be highly likely to inspire and educate others.

Arthur Fried confirmed that this attention to people was not an incidental feature of AVI CHAI's grantmaking, but was thoroughly woven into the organization and its practices. "The way we dealt with grantees, the way we dealt with everyone, was a certain level of professionalism," he said. "We tried, in every instance, to have great respect for everyone, including grantees. I would think that different operating organizations found it pleasant to work with AVI CHAI. I found that style more important than some of the things we did. … We dealt honestly, fairly, openly, and constructively with everyone with whom we came in contact."

Leaders of grantee organizations commended this "style" as well. For example, Nina Bruder, director of the Jewish New Teacher Project, cited AVI CHAI's guidance and support for her as she experimented and grew into her leadership position. The Foundation, she said, supported strength but also recognized weaknesses — and when they found the latter, "they tried to support the growth in the area of weakness to strengthen the possibilities. They stuck with us when times were tough, and that is, I think, a bit unusual."

Professionals at other Jewish philanthropies likewise regarded the professionalism and experience of AVI CHAI's staff as a resource for the wider field. For example, Holly Cohen, then executive director of the Kohelet Foundation, described to me how, in her earliest days as a foundation officer, Yossi Prager had served as a mentor, advisor, and sounding board for her. Having come from outside philanthropy, she said, it was reassuring for her to know that "I had Yossi there for me to call on, to poke holes in my ideas, and to encourage me." Even beyond this one-on-one support, Ms. Cohen said, "AVI CHAI, for us at the Kohelet Foundation, has always been the benchmark of excellence. They do everything so well. They do everything at such a high level. And I think that they've really set the bar high for

others — for schools and for all other organizations in the field. Even though they're sunsetting, the bar will be there."

The same "style" applied to AVI CHAI's attentiveness to its own staff. For a foundation that is spending down and preparing to close its doors, maintaining a high level of loyalty and morale — especially toward the end — can be challenging. AVI CHAI did establish several retention incentives that were intended to prevent premature staff attrition, such as pension benefits that initially were more favorable for employees who remained to the end. Two years before sunset, the Trustees understood that program staff might be recruited by other organizations and would suffer financially if they accepted an offer. At that point, Mr. Fried and Ms. Bernstein decided that it would be more beneficial to the program staff *not* to feel financially compelled to remain in place until the sunset. So they changed the policy and allowed program staff to receive their maximum retirement packages whether or not they remained to sunset.

The reason for the change was, most of all, that Mr. Fried and Ms. Bernstein did not want anyone's service to AVI CHAI to come at the price of impeding their career or preventing them from making an important contribution elsewhere. The Foundation provided career coaching and some professional-development opportunities for staff members and generally made it clear that, if a great career opportunity arose, AVI CHAI would not stand in the way, nor would severance benefits be in jeopardy.

The result, to almost no one's surprise, was that staff attrition was in fact minimal. Employees remained until very close to the end. ""People didn't want to leave," program officer Galli Aizenman told me. "They still don't want to leave." The message that she and others drew from the change in retention policy is that the Trustees viewed their staff members as part of the Foundation's contribution to Jewish philanthropy. It made her feel, she said, "like we are AVI CHAI's legacy as much as the grantees. And they understood that, and they didn't take that for granted." The flexibility has clearly paid off: In the Foundation's final months of grantmaking, several staff members are moving into leadership positions in the Jewish communal world.

The kind of outplacement support that AVI CHAI has offered strikes me as enormously generous and wise. The Foundation clearly believes in the staff people whom it recruited and who have served it well. And the decisions that AVI CHAI has made strike me as being unusually generous but not profligate. The decision to offer severance and pension benefits even to those who left early has proven not to be especially disruptive or costly. Instead, it has demonstrated a humaneness that sets a positive example for the field.

Ultimately, of course, none of this would have made much difference if AVI CHAI had not recruited top-quality talent in the first place, encouraged them to collaborate and learn from one another, and exercised flexibility in letting employees grow and arrange their work lives in ways that brought out the best in them. In a blog post at eJewishPhilanthropy.com, Yossi Prager summed up the Foundation's approach to personnel, professionalism, and morale this way:

As I reflect, four factors most significantly contributed to AVI CHAI's ability to retain highly-performing staff: (1) the people we hired, (2) a feeling of partnership among Trustees, management and staff, (3) the opportunity for evolving roles even within the same jobs and (4) work-life flexibility. What ties all these elements together is a belief that while organizational success depends on many factors, including strategy and finance, nothing matters more than recruiting the right people and enabling them to succeed and grow.

PART VII: LESSONS AT SUNSET

What Other Foundations Can Learn from AVI CHAI's Limited Lifespan

No two foundations are alike. Every private foundation has its own history, its own founders, sometimes the founder's own families, and, usually, its own mission, often unarticulated but nonetheless ingrained in its culture. Most private foundations in the United States describe themselves as presumably perpetual, but, since about 1990, an increasing — but still small — number describe themselves as time-limited. While the AVI CHAI Foundation is one of the small number of time-limited foundations, I have been struck often by the fact that many of the lessons from its experience have a great deal of applicability to presumably perpetual foundations as well as other time-limited foundations. In this chapter, I am highlighting nine lessons that may reasonably be learned from the experience of AVI CHAI that might prove to be useful to the leaders of all kinds of foundations, whether presumably perpetual or time-limited.

1) Keep foremost in the minds of the foundation's staff and Trustees the mission and goals to which the foundation is dedicated. AVI CHAI's mission, in its full, page-long articulation, is always the first page of the docket book for every Board meeting. As foundations go, this bright, clear and insistent mission is among the most rare I have ever encountered. Dedicating all of the programs of a sizable foundation to the aim of strengthening "commitment to Jewish observance and lifestyle" and fostering "mutual understanding and sensitivity" among Jews of all backgrounds — a large number of people, diverse in their ethnicities, existing beliefs, denominational affiliations, and in many other ways, living in three different continents — constitutes a bold and brave mission indeed. To commit to that mission in an age in which all religions are subject to strong headwinds has to be regarded as praiseworthy at best, as well as foolhardy at worst. The fact that AVI CHAI's Trustees did so and, as this report has suggested, succeeded to a considerable even if not uniform extent, attests to their vision, passion, intelligence, and resolve in fulfilling the Foundation's mission.

2) Test all prospective initiatives against their contribution to the achievement of that mission and its goals. At a crucial moment, as it was about to enter its last decade of grantmaking, AVI CHAI systematically evaluated every project and program according to its level of contribution to the Foundation's 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 powerful. This exercise of ranking and pruning was driven most immediately by the Foundation's impending sunset, as well as by the budgetary constraints imposed by the 2008 financial crisis. But it is a discipline that would benefit any foundation, at regular moments in its history, even if it plans to operate indefinitely.

3) Choose and recruit a Board of Trustees with diverse professional and intellectual skills who are vigorously independent-minded and comfortable in expressing their differences with others in a civil and respectful manner. For AVI CHAI, this combination of independent thinking and collegial deliberation ensured both sound governance and profound vision and insight in shaping the Foundation's grantmaking.

4) Choose and recruit as program officers individuals who are comparably independent-minded, collaborative and comfortable in challenging Trustees when they feel the need to express their own views. The professionalism and independence of thought that typified the AVI CHAI team contributed not only to the Foundation's own strategic thinking, but (as Holly Cohen of the Kohelet Foundation put it) to "setting a bar" for other parts of the Jewish philanthropic world.

5) Due Diligence: Commission rigorous analyses by knowledgeable individuals of the landscape of the problems you are contemplating attacking, to determine their relative importance to one another and their relative ripeness for improvement during the time frame of your foundation's existence. As recounted elsewhere in this report, the Foundation's choice to focus one of the two major programs in North America on Jewish day schools was based on a careful analysis of the most likely effective means of fulfilling the Foundation's mission. Moreover, after the Foundation settled on day schools as a prime target, an AVI CHAI team conducted further due diligence exploration, as Yossi Prager described in a 2019 speech: "Dr. Marvin Schick, Lauren Merkin, and I figured that the best way to learn would be to visit schools and gain information about needs and opportunities. Over two years, we visited somewhere between 100 and 150 day schools across the country, in the metropolitan New York area and also in L.A., Chicago, Florida, Atlanta, Columbus, and more."[4]

6) Examine the landscape of other foundations and nonprofits, if any, that are already working on the problems which you are interested in solving, and get a reliable understanding of how they are going about doing what they are doing.

7) Determine which of your goals you can pursue alone, and which will require the help of other funders. Among the problems you care about, there may be some for which you have the ideas and financial resources to make a significant difference on your own. On these, don't be afraid to forge ahead by yourself. Some, however, may call for resources or expertise beyond your command. For those, you may conclude that you will need the

[4] "Remarks by Yossi Prager at 2019 Prizmah conference," March 14, 2019 https://ejewishphilanthropy.com/remarks-by-yossi-prager-at-prizmah-2019-conference/

participation of others. Depending on your mix of goals, you may need to strike a reasonable balance between initiatives that you believe you can tackle alone and the other initiatives on which you conclude that you will need others' ideas and help.

8) Even if you choose to go it alone, you may find that funding partners will be useful later. When you believe, on the basis of reliable data, that a model initiative you have developed is working, consider involving partners in scaling and/or adding complementary initiatives that reinforce and that seem likely to contribute to the effectiveness of the overall project. However, it can sometimes be challenging to persuade other funders to join a mature project, in which they have had no prior role. Hence the next lesson:

9) Seek collaborators, partners, and co-creators as soon as an idea is ready. Once you have begun to create a track record of initiatives of persuasiveness about your ability to contribute successfully to the range of problems on which you have chosen to work, consider inviting other foundations to co-create further efforts that complement your own.

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 that the real results of AVI CHAI's philanthropy inhere in 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.

POSTSCRIPT: SOME THOUGHTS ON ARCHIVING

In the summer of 2019, less than six months before the end of AVI CHAI's grantmaking, I had a discussion about the AVI CHAI archive with Yossi Prager, the executive director for North America, and Eli Silver, the executive director for Israel. The fundamental conclusion of this discussion was that it is wise to begin answering basic questions about a foundation archive well before the institution's sun is setting. The most important of these questions 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? The following are excerpts from an article written by Mr. Prager for the website eJewish Philanthropy and a portion of my conversation with Dr. Silver, both of which elaborate on how AVI CHAI dealt with these issues.

From the online article by Yossi Prager:

> 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.
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> Even with professional archivists doing the work, there was also the consideration of the staff time needed to develop with the archivists the guidelines about what will be made public and when. We decided early on, based on our belief that donor intent was to establish an archive, that the time and money was justified.
> The privacy concerns were more challenging. Ultimately, we came to the conclusion that Trustees and staff should have understood that the recordings and transcripts of meetings would ultimately become public as part of an archive. We nonetheless consulted with the Board and staff and heard no deep concerns about their personal privacy. However, because of privacy concerns, we did not even consider including in the archive any emails or documents that had been labeled "Eyes Only."
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> That left the issue of the privacy and potential harm to grantees and the people associated with them or others corresponding with the foundation. … Seeking some guidance, I consulted with Rabbi Dr. Jacob J Schacter, a rabbi, ethicist and historian. He urged that we apply a balancing approach: If the problematic material is rare, and the overwhelming majority of the archive would prove useful to the public, we should proceed.

… We continue to weigh one open question: when the various kinds of materials – proposals, memos, evaluation reports, transcripts, etc. – should become public. We have the option of restricting different kinds of material for different time periods. Restricting material for decades, until all of the people mentioned are out of the workplace or deceased, would diminish the privacy concerns, but it would also make it far less likely that anyone made use of the archives when the material becomes available. We are currently seeking a middle ground.

The smartest thing I did in the process was to hire Mimi Bowling, herself an archivist, to look through our files in the office and at the warehouse and prepare a report ranking the materials from 1-5, with 1 meaning "discard" and 5 meaning "absolutely keep." Mimi was able to tell us approximately how many linear feet we would likely be archiving, even as the final decisions remained with the foundation. Mimi also advised us as we were evaluating possible hosts for the archive.

… In North America, after exploring options, we decided that we wanted an organization with a fine reputation for expertise and professionalism in archiving that would also have familiarity with the organizations and terminology within the Jewish community. On these criteria, AJHS [American Jewish Historical Society] was an easy choice; they also have archives for HIAS [founded as the Hebrew Immigrant Aid Society]and UJA-New York Federation, among others.

…The donors of the archive need to decide which material will become public immediately, and when the other material may become public. (There are some exceptional items that will never be made public such as social security numbers and similar information. These are weeded as part of processing the archive.) The process of deciding on the guidelines has been the most challenging and interesting part for me. In our case, we have made some decisions, and others remain open until the processing is completed.

From my conversation with Eli Silver: On our end, we have a contract with the National Library of Israel. The National Library now has a researcher who started in the summer and was here for several weeks, most days for full-time, more or less, going through our boxes and files. But recently that has cut back. She's not reading every single item. She's getting a sense of what there is, categorizing and putting it in boxes. And we've talked about the categories of materials that they would definitely take, those things that they're not supposed to take, and those items that are question marks that we haven't yet come to a conclusion about.

Joel Fleishman: The earlier you start thinking about it, the more you can simplify the process by having made decisions about what's going to be included and what isn't going to be included, and who has to be consulted and who doesn't have to be consulted, as well as for how long the materials are going to remain restricted.

So there is, in a sense, a sliding scale. The later you make the decision to archive, and the later you reach all of those decisions about what to include and what not to include, the harder it will be to define and plan for what you do with the materials generated during the interim, between the time you've reached those decisions and the time the entity goes out of business.