

Jewish Values as the Inspirational Wellspring for the Endowment Professional

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Endowment professionals in the North American Jewish community have a decisive role both in fostering a culture for Jewish legacy and in facilitating individual gifts. This role goes beyond technical proficiency. I have personally found, and have observed in my colleagues who are successful, that the inspiration for this work derives from our Jewish values.

There is an energy that drives us, a sense that we are at the center of action in connecting donor prospects to the largest, most intricate gifts they will make, whether through lifetime family philanthropy or testamentary legacies. The wealth transfer is a bull market where money flows and multiple factors converge in a complex setting. We first and foremost must keep faith with our donors. Our appreciation of family relationships that impact the planning and our in-depth knowledge of community interests often allow us to bring the two together in an optimal way. What gratifying work, but rarely a “straight line.”

In such weighty endeavors, Jewish values are not peripheral; they are core. As transactional as our day-to-day functions may seem, the value system is what provides us an essential anchor.

What are these values? How can we perceive them as distinctly Jewish, rather than universal? To the extent that many traditions pre-date, are built on, or mirror Judaism, these principles are universal. However from the Torah, Prophets, and Talmud through medieval and modern day Responsa, Jewish values, while subject to a range of interpretations, are distinct.

In “Jewish Wisdom,” Rabbi Joseph Telushkin invokes Babylonian Talmud, Shabbat 31a, to emphasize the centrality of ethics in Judaism.

“In the hour when an individual is brought before the heavenly court for judgment, the person is asked:

- Did you conduct your [business] affairs honestly?
- Did you set aside regular time for Torah study?
- Did you work at having children?
- Did you look forward to the world’s redemption?

“Note that the first question asked in heaven is not ‘Did you believe in God?’ or ‘Did you observe all the rituals?’ but ‘Were you honest in business?’ ”

Telushkin concludes: “The above passage unequivocally asserts that ethics is at the heart of Judaism: God’s first concern is with a person’s decency.”

Thinking about our endowment profession, I have gleaned nine principles that emerge from Jewish texts as a basic framework for approaching our work and appreciating it more. This list is by no means comprehensive, or in order of priority.

1. Repairing the World [Tikun Olam]
2. Responsibility to the Jewish People [Clal Yisrael]
3. Remembrance and Continuity
4. Respect [Derech Eretz]
5. Justice [Tzedek/Tzedakah]
6. Discretion in Speech
7. Strength and Courage [Hazak V'ametz]
8. Moderation
9. Gratitude [Hakarat Ha'tov]

Making distinctions, a fundamental concept in Judaism, is important when applying the above values to our professional lives—a task easier said than done. Life is not black and white. What might be viewed by one person as discretion could be construed by another as lack of courage.

Rabbi Allan Kensky, former vice-chancellor of the Jewish Theological Seminary, held his first pulpit in Ann Arbor, Michigan, where I was privileged to be a congregant and study with him. He taught that many factors may influence a decision about “the right thing to do,” but that convenience must never be one of them. Moreover, the very act of seeking a Jewish framework to guide us sets a positive direction.

Legacy

Chief among our professional tasks is legacy: the creation of permanent endowments to ensure financial support for Jewish institutions of the future. In fulfilling his promise to the future of the Jewish people, the legacy donor is more focused on Clal Yisrael than he is on himself. He knows that he may not be around personally to enjoy the fruits of his generosity, but the act is just as compelling to him.

As endowment professionals, we share with our donors a commitment to fulfill that promise from generation to generation. We, too, know that we will not be here to enjoy the fruits of our labors. Our commitment derives from our own responsibility to Clal Yisrael. The donor is involved because he wants to repair the world, as do we. This common ground is the inspirational bond that connects us.

Jewish tradition also gives great merit to memorializing loved ones on the anniversary of their death by saying Kaddish and giving Tzedakah. As endowment professionals, we are uniquely positioned to facilitate permanent named memorial funds, thus combining Jewish values of remembrance with practical outcomes for the community.

“May his memory be for a blessing,” the honor given to the deceased, holds distinctive endowment significance. In Judaism, every blessing must be followed, without fail, by a positive action. For donors, one way to follow words with deeds is to create permanent financial support for ideas championed during lifetime. As endowment professionals, we are often in a pivotal position to foster such actions.

Donor Relations

Our donors' trust, the cornerstone of our work, is built on listening, respect, confidentiality, and promises kept. To maintain this trust, we must use our words conscientiously, both in our personal communications with donors and out in the community, always mindful of discretion in speech and the impact it can have on individual relationships and, ultimately, on our achievements.

Rabbi Telushkin notes that “the truth in our heart,” that is only known to us, is information that can have bearing in a situation. He tells of a rabbi, also a merchant, reciting daily prayers as a customer enters his shop. Not realizing that the rabbi is immersed in his prayers, the customer asks if a certain item is for sale and indicates that he is prepared to purchase it at a certain price. When the rabbi finishes praying, he turns to the customer, knowing that he had intended to sell the item for less than the price offered. The rabbi shares with the customer the real price—the one he knew, but only in his heart—and the sale is completed.

The rabbi acted on what he perceived to be the truth. Maintaining his integrity was more important than intentionally taking advantage of the situation. While this vignette may seem at odds with the prevailing mentality, how often throughout the day do we have opportunities to take the higher ground?

I recall Dr. Sam Zaidenberg, an elderly physician who came in to the Jewish Community Foundation to donate a \$200,000 piece of highly marketable undeveloped property. There was a tax incentive, coupled with a desire to “do something” for the Jewish community. His limited knowledge of the available options might have led to an unrestricted gift. But I felt obligated to adhere to our protocol and let him know that the beneficiaries of his fund were his to designate.

I have never seen such a personal transformation as followed that disclosure. Dr. Zaidenberg wanted to leave something to his Temple and to the symphony. After our discussion he decided that the rest would go to the Foundation, unrestricted, for grants. This darling man nearly flew out of the Foundation, saying he felt like a philanthropist.

Lay Leaders

The volunteers with whom we work share the values that motivate us as professionals: repairing the world and responsibility for the Jewish people. They share our concrete objectives, as well: building endowments to sustain the community long-term and facilitating current participatory funding.

Jewish principles, above all, permeate these relationships. This is a partnership in the truest sense, the most essential one that we have. A mix of kindness and truth is certain to emerge in situations that involve people. For example, choosing the best chair for the committee may bring into conflict two values: fairness to a veteran volunteer who has earned it through years of service and the necessity of bringing in new or sometimes stronger leadership, which is in the organization's best interest. The harshness of such reality can often be softened by the thoughtfulness of speaking with the volunteer in question well in advance about plans for succession.

In the work we do together, as we collectively strive to build a community, all of us are vulnerable to life's favorite sport—gossip. It is generally innocent and social; we just like talking about each other. In the best of Jewish tradition, we as professionals can aspire to set a *Dugma Ishit*, a personal example, and—as much as possible—speak with discretion in our interactions.

Staff

Alongside inspiring lay leader involvement, supervising and working with staff members, our human resources, is a key responsibility of the endowment professional. How communications occur can be as important as the messages themselves. *Derech Eretz*, respect for each individual regardless of station, and kindness in extenuating circumstances, transmit the regard with which the other is held.

As in any business, though maintaining high standards of performance is paramount to the organization's success and thus concern for the individual employee, no matter how heartfelt, cannot stand in the way of ensuring that these standards are met. Failure to dismiss staff members who do not measure up diminishes respect for those in charge and has a negative impact on office morale.

Making distinctions regarding the right thing to do is a weighty task and there may be conflicting Jewish values to consider. Usually courage to take corrective action can be tempered with consideration to the individual. To invoke Rabbi Kinsky once again, as long as the decision is based on ethics, not convenience, we are going in the right direction.

Managing the Business

Administration is, for some, the most arduous part of the job. Implementing new computer systems, pouring over budgets, or moving offices may lack the joy of a family closing its long sought-after philanthropic plan. Yet such diligence, along with the courage to take decisive action, is necessary to achieve high functioning operations.

In our constant effort to achieve excellence, however, Maimonides' emphasis on moderation, that life is lived in the middle, is easily overlooked. Stephen Covey framed the idea in *First Things First* that "good is the enemy of best." While this can be true, just as often "best is the enemy of good." If we have grand aspirations, but are limited in both the human and financial resources, "good" may be the goals that are admirable and also attainable.

Finally, the Jewish value of gratitude, *Hakarat Hatov*, reminds us to appreciate everything that we have been given. Prominent in this list is the opportunity to be in such a position to make a difference and to collaborate with colleagues, volunteers, community professionals, and donors in the powerful way that we do.

The Public

As Jewish endowment professionals, we are among those who represent our Jewish community to the society at large. We acknowledge and accept the responsibility to *Clal Yisrael* to do this in the best manner possible.

To this end, Jewish texts expound on our ethical obligations in business dealings. Derech Eretz dictates respect for all vendors, grant seekers, and colleagues wherever our paths intersect.

Reminders of Who We Are

Keeping Jewish values visible requires a conscious effort. Public events, board retreats, and promotional materials offer an opportunity to use Jewish imagery and quotations. The Hebrew date alongside the secular one on correspondence or a meeting that opens with words that celebrate an achievement of Israel or comfort fellow Jews somewhere across the globe quietly communicate who we are.

Differences in background and education means that we do not all share the same knowledge or experiences. To close the gaps, we can open gatherings of any sort with reflections rooted in Jewish experience. For example, a rotating board-led discussion based on an anthology of Jewish ethical wills is exciting and accessible to everyone. Insights from a board member's trip to India, the politics of the Enron collapse, or reaction to a film like "Munich" can be stimulating and bonding discussions in which all can participate.

Conclusion

Endowment professionals have much to offer North American Jewry in its pursuit of a secure future. We have insight into the world, into the needs of the Jewish community, and into the hearts of our donors. Through our experience and broad community resources, we are able to help build the funding base for the institutions and causes that will preserve Jewish life into the next generation. Jewish values provide the foundation from which we draw sustenance in our task. Working together—collegially and with the support of our national network United Jewish Communities—we are a true example of Clal Yisrael in action.