

# The Meaning of Jewish Community: *Our Experiment with a Community Ethical Will*



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Jewish. Community. Forever.

# Community

com·mu·ni·ty  
/kə'myoʊnədə/  
*noun*



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A social, religious, occupational, or other group sharing common characteristics or interests and perceived or perceiving itself as distinct in some respect from the larger society

*What do you get when you put 18 rabbis in one room to write something together...?*

This talk is about a document – an ethical will. But more accurately, it's about *community* and why our ethical will helped build community.



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# What is an Ethical Will?

- A non-binding letter or document created by parents or grandparents for their heirs;
- A vehicle for communicating personal values, ethics, wisdom, stories, wishes, feelings, or advice to those we love;
- A tool for creating a meaningful personal legacy; passing along beliefs for posterity – long after you have physically left this world;
- An ancient Jewish practice that began as an oral tradition (Jacob addressing his twelve sons), first formalized into a written document in the late 12<sup>th</sup> century;
- A practice experiencing a resurgence in the modern Jewish community



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**Legal wills address: “What do I want my loved ones to have?”**  
**Ethical Wills address: “What do I want them to *know*?”**

# What a Community Ethical Will Meant to Us:

***“You are not obligated to finish the task, but neither are you free to neglect it.”***

***Pirke Avot***

- A statement of shared community values;
- A vehicle for communicating our community’s legacy; what we’ve learned and what we believe;
- A tool for defining our unique purpose as a Jewish community;
- An explanation of why Jewish community matters and what the real meaning of our work as Jewish communal professionals is all about;
- A way for us to underscore that our work was about more than money; a way to bequeath our values rather than our valuables.
- A “mission statement” for our community

# Why A Community Ethical Will: The Back Drop

***Feasibility  
Study  
Exposed  
Weakness in  
Our Sense of  
Community***

- Desire to build community endowment & a strong partnership between Foundation & Federation, dedicated to pursuing the goal for all Jewish institutions in the community;
- Exploration of a multi-institution, community-wide endowment raising initiative; launch of a fundraising feasibility study;
- Feasibility study findings:
  - High capacity and willingness to give (20% over national averages);
  - Pessimism about Jewish giving, Jewish institutions & the future;
  - Longing for change, but little confidence that change is possible;
  - Is our mission money? Is our sense of community limited by our organization's transactional relationships?



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# A New Kind of Campaign: Changing the Perception of a Community

- **The Problem:** How does a community ask for endowment when donors are pessimistic about the future?
- **The Solution:** Two campaigns – a campaign of hope & ideas and a fundraising campaign to invest in the future of those ideas. The key: it is critical to build a spirit of optimism and hope.
- **The Result:** The Aim Chai Endowment Campaign  
Communication Themes:
  - New ideas to transform Jewish Hartford
  - “The common thread that connects and sustains us all”
  - “Because we’re stronger together than apart”
  - “When we Aim Chai, anything is possible”

*“Hope is a good thing, maybe the best of things, and no good thing ever dies.”*

***Aim Chai – Because We’re Stronger Together Than Apart***

# A Unique Approach to Fundraising

- Key Characteristics:
  - A conversation about community;
  - Financial Goal: \$40MM;
  - 28 partners (Federation, synagogues, day schools, JCC, other);
  - Current giving, not legacy focused (although legacy accepted);
  - Central solicitation for major donors – i.e. campaign solicits on behalf of all participating agencies/synagogues for cross-institutional donors;
  - Donor choice – i.e. donor directed giving
- Most Important Procedural Concepts:
  - Long solicitation cycle involving multiple conversations over months;
  - Most important part of conversation: “What matters to you?”
  - Willingness to turn down gift indications to pursue deeper conversations about the meaning of philanthropy and the donor’s personal passions

*A Conversation About  
Meaningful Ideas*

# Changing the Perception of Community = Results

## Results to Date:

- Total Commitments: \$39MM; \$30MM current, \$9MM legacy;
- \$6.0MM gifts in the pipeline for completion (\$5.0MM current, \$1.0MM legacy)
- Likely final outcome: \$45MM+
- Average gift size = 500% of initial donor indication
- 72% of all donors are first time endowment donors



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*Building a Culture of Endowment; Generating Funding for New Ideas*

# Back to the Ethical Will

## Why An Ethical Will

- To reinforce the message that the campaign was about something deeper than money (community success does not equal dollars raised);
- Parallels between endowment, the values we care about, and the purpose of an ethical will.
- A vehicle for rallying the community around a set of shared ideas that define us as Jews and a reminder that the campaign was only a tool for achieving a far larger goal: the sustenance of a vibrant, healthy Jewish community.
- A way of reenergizing the campaign effort at the midpoint;
- A way to actively involve all of the community's Rabbis in the campaign.

***Reminder: Money is only a tool to achieve something far greater***

# The Greater Hartford Jewish Community Ethical Will

- Authors: The Rabbinic Association of Greater Hartford (18 month process!)
- Result: A brief, powerful and moving representation of values; a reminder of why we do the work we do and what lies at the heart of “community”

***Our Takeaways:***

***Created Much Buzz  
and Positive Feeling;***

***Reminded Us All  
Why We Do  
the Work we Do***



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# The Greater Hartford Jewish Community Ethical Will

*“May this document be a living witness to our present hopes & a blueprint for the community we hope to leave our children”*

- How it was used:
  - Presented to community at public celebration;
  - Every partner agency/synagogue and major donor received a framed copy for display;
  - Everyone in the Foundation database received an index card sized laminated personal copy;
  - Tear-off out version included the annual report;
  - Media coverage: Jewish & Secular
- Recently: Launched an ethical will writing program for donors



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# Our Community's Ethical Will

*As the Rabbis of the Greater Hartford area, we see ourselves and our congregations as stewards of the generosity of those who came before us. We found orchards of learning, bushes burning unconsumed and our air filled with compassion.*

*We affirm the centrality of Torah, Chesed, Tikkun Olam, Tzedakah, and Achrayut, of learning, compassion, justice and communal responsibility. We have committed our rabbinate to the belief that our tradition and connection with our Creator brings meaning to our lives as individuals and as a community. We recognize that from our creation we were not meant to be alone, and that we need each other. Our enduring legacy is to exhibit generosity of resources, faith, wisdom and kindness that others might be as fortunate as we are. We affirm that we bear responsibility to each other and that our own spiritual journey is part of a larger covenantal framework which guides our lives.*

*The challenges of today and tomorrow present both manifold needs and opportunities to assist in continuing the chain of tradition that is our inheritance. We affirm the inspiration and truth of the essential teaching of our tradition: 'You are not obligated to finish the task, but neither are you free to neglect it.' (Pirke Avot 2:21)*

# What We Learned

- Hope, optimism and a belief that real change is possible are powerful emotions – even more effective when rooted in a Jewish context;
- Endowment is a complex idea and requires emotional attachment points to make it meaningful;
- Engaging donors in conversation about their passions and philanthropic interests not only leads to larger giving, it also builds stronger relationships;
- Major endowment campaigns can be conducted side by side with annual campaigns with no impact on annual giving;



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# What We Learned (continued)

- A unifying, central theme can tap into a personal search for meaning and transform the nature of a campaign discussion;
- Powerful ideas can motivate gifts even without a solicitation – the non-campaign, campaign;
- An endowment campaign, if done right, can build community and can even counter the transactional nature of annual fundraising;
- Complex collaborations can be successful, but require a high degree of trust.



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# Conclusion

“

*Throughout all creation, just beneath the surface, joining each person to every other person and to every other thing in a luminous organism of sacred responsibility, we discover invisible lines of connection.*

”

Rabbi Lawrence Kushner,  
*Invisible Lines of Connection*

Successful, diverse Jewish communities are all about finding unifying ideas that both explain the common thread that invisibly connects us all and about what distinguishes us from others.

A community ethical will can be a tool for achieving this goal.

# Resources

***The Wealth of Your Life: A Step-by-Step Guide for Creating Your Ethical Will*** by Susan B. Turnbull; 2012, Benedict Press

***Ethical Wills: Words From the Jewish Heart*** by Dr. Eric L. Weiner; 2015  
(copies available from the author)

***Ethical Wills and How to Prepare Them: A Guide to Sharing Your Values from Generation to Generation*** by Rabbi Jack Reimer and Dr. Nathaniel Stampfer; 2015, Jewish Lights Publishing

***Your Legacy Matters: A Multi-generational Guide for Writing Your Ethical Will*** by Rachel Freed; 2013, Minerva Press