

The Adaptation Process of Jewish Philanthropies to Changing Environments: The Case of the UJA-Federation of New York Since 1990

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Abstract This paper considers the process of organizational adaptation that took place at the UJA-Federation of New York (UJAFED) between 1990 and 2014. It aims to enhance theoretical understanding about the process of adaptation by philanthropic organizations to their changing environments, the strategies they develop to cope with these changes, and the implications of these changes. Findings demonstrate that over the last two decades, the UJAFED has operated in turbulent and unstable environments, characterized by a reduction in resources and increasing needs in the communities. These changes have led UJAFED to establish a new domain for its activities that prioritize its mission of Jewish continuity by funding services and programs that emphasize Jewish identity, education, and culture. In this new domain, UJAFED has expanded activities to reach diversified client populations in New York and in Israel. The development of a new domain of activity has had implications for UJAFED's traditional and new roles, since it has influenced its operating strategies, reshaped its mission-driven goals, and changed UJAFED's relationships with its peer organizations and partners.

Keywords Jewish federations · Philanthropy · UJA-Federation of New York · Jewish organizations · Jewish community of New York · Federation-synagogues relations · Domain creation

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The Changing Ecosystem of Jewish Federations

The Jewish federation system of North America developed at the turn of the 20th century as a centralized mechanism to raise philanthropic funds from North American Jews. The system also planned and executed the distribution of charitable funds. More than 200 Jewish federations were established in cities and regions across North America as communal fundraising organizations. The federations were unified in their desire to implement effective, efficient, and productive fundraising strategies in their local communities. Federations engaged in robust regional planning and in the allocation of funds that supported the provision of services to Jewish and non-Jewish communities by federation-affiliated human and social service agencies (Bernstein 1983; Feldstein 1995; Liebman 1979; Waxman 2010). The ideological underpinnings of the federations included a nominal number of clearly articulated Jewish values as the basis for collective Jewish action. The federations prioritized philanthropy as a leading expression of connection to the Jewish community, thus cultivating the perception of Judaism as a civil religion characterized by developed myths, ceremonies, and unique practices to achieve their aims (Woocher 1986). The Jewish federations allowed for the fulfillment of the principle of *noblesse oblige* for many donors, and created a sense of communal identification (Lubove 1965a, b; Sarna 2009). They aimed to democratize communal leadership by transforming philanthropy into a popular practice that is accessible to all community members. In certain cases, they endorsed the social mobility of individuals by facilitating their participation in professional-social networks that were diverse in the religion, ethnicity, age, and profession of their members (Bremner 1988; Seeley 1989).

Beginning in the 1980s, the cultural, political, demographic, and economic settings in which federations operated changed dramatically. Primary developments contributing to these changes included the migration and resettlement of Jewish communities from the former Soviet Union to Israel and to the United States, which continued through the 1990s, and the expansion of local social and human needs. In the early 1990s, the National Jewish Population Survey identified a growing trend in interfaith marriage, which, in turn, led to intensifying fears of the loss of Jewish identity and ethnicity.¹ The resulting crisis in Jewish continuity was defined as the diminishing sense of belonging to the Jewish community. This was especially notable among younger members of the American Jewish community. Several sociological surveys confirmed young adults' lack of a perceived shared fate and purpose that had historically bound together North American Jewry with other Jewish communities. Researchers identified shrinking concentrations of Jewish populations in traditional North American Jewish neighborhoods, and a reduction in the existence of Jewish social networks. The decrease in the religious and ethnic homogeneity of North American Jewish communities resulted in a dynamic self-definition by individual Jews as they moved beyond traditional demarcations (Cohen and Kelman 2007; Gans 1994; Kleinman 1996; Sarna 2004).

¹ Council of Jewish Federations, Large City Presidents and Executives, Current and future challenges to federations. September 3, 1991 (American Jewish Historical Society (AJHS), Subgroup VI; I-433/Box 60/Folder 5).

In addition, American Jews were reducing their support for the State of Israel. This diminished philanthropic support coincided with the disappearance of the crisis mentality to which American Jews had responded since the Jewish state's founding, and which had been a priority on federations' fundraising agendas for many years (Tobin 2001). The development of critical perspectives toward Israel has grown as the concept of Israel as the spiritual and cultural center of the Jewish people has become less commonly shared. The fact that Israel's economic growth has failed to immediately create an elite Israeli class with its own culture of philanthropic giving has contributed to further criticism of Israeli society by North American Jews (Cohen and Kelman 2007; Elazar 1995; Sheffer 2012; Tobin 2001). It is notable that some critiques of Israeli philanthropy have diminished in recent years with the publication of reports of growth in the scope and volume of charitable giving by wealthy Israelis. Government data indicate that in 2011, Israeli donations to the non-profit sector totaled NIS 5.7 billion, equal to USD \$1.5 billion (Central Bureau of Statistics 3.3 2014). This data suggests that Israeli philanthropy has grown to a 40% share of contributions to Israeli non-profit organizations, an increase of 21% from 2006 (Schmid and Shaul Bar Nissim 2016).

These trends have manifested themselves in the diminished legitimacy for activities of federations in their traditional role as central Jewish institutions across North America. The noted trends have also significantly affected federation fundraising efforts. Over the past two decades, American Jews increased their philanthropic support of non-Jewish and universal causes (Kosmin 1991; Tobin and Weinberg 2007). The diminished legitimacy of federations has been further reinforced by reciprocal influences shaping general American philanthropic behavior and American-Jewish philanthropy, consistent with other cases of ethnic philanthropy in America. Jewish giving has become more strategic and goal-oriented, notable because of greater donor involvement in gaining control of philanthropic processes (Xia-Huang 2007). This has resulted in movement away from contributions to Community Chest Jewish communal organizations and toward contributions to niche-focused philanthropies and direct donor engagement with non-profit organizations. Consequently, the thriving philanthropic arena in Jewish communities has been increasingly characterized by competition for Jewish contributions by private foundations, "friends of" organizations, and conduit organizations for funds. While some studies identify twenty-five hundred new Jewish foundations that were established between 1996 and 2002, other scholars put the figure of newly created Jewish foundations as high as nine thousand. Moreover, 774 new fundraising organizations that support Israeli causes were developed during the 1990s (Charendoff and Prager 2010; Cohen 2002; Fleisch and Sasson 2012; Gerstenfeld 2010; Kelner 2013).

Changes in the federation system's local and national environment raise questions about federations' ability to adapt to these changes, the implications for their philanthropic activity, the enactment of their traditional roles, and the presence of challenges to the governance structures of this central voluntary system of an ethnoreligious community. These questions remain understudied, as scholars have not rigorously probed changes in the environments in which federations operate or the impact these changes have had on federations' ideology, missions, goals,

functions, and structure. The present research aims to contribute to the literature by exploring the adaptation process of Jewish federations and implications of adaptive processes for the federation system's philanthropic priorities and activities. These issues are addressed here through the case of UJAFED, and the organizational transformation it has undergone since the 1990s. Defined by social psychologist Walter Lurie as "the most *sui generis* of all genera, highly atypical" (Lurie 1969: 257), UJAFED has unique characteristics that make it an excellent selection as a case study. Established in 1917 as the 23rd North American Jewish federation, UJAFED was founded initially as a non-sectarian organization aimed at regulating Jewish communal activities. In 1986, UJAFED merged with the United Jewish Appeal of New York (UJA), taking on UJA's international missions. Over time, UJAFED grew into the largest and wealthiest of Jewish philanthropies, achieving the highest annual fundraising revenue of any federation (\$140 million per year), and establishing an endowment of \$1.3 billion. Today, UJAFED is involved in a wide range of local and international philanthropic activities serving diverse Jewish and non-Jewish communities (Bernstein 1983; Goldwasser 1961; Lurie 1961).²

I utilized two methods in gathering the information and data for this study: First, I performed a systematic analysis of UJAFED's organizational documents between the years 1990 and 2014, including an analysis of local communal publications, scholarly publications, and publications of the Jewish newspapers in New York. Second, I conducted 55 in-depth, semi-structured interviews with UJAFED's current and former professional and lay leadership, based on a snowball sample (Coffey and Atkinson 1996; Fontana and Frey 1994). I then conducted additional interviews with executives of beneficiary agencies, scholars of collegial Jewish communities, and Jewish media experts in New York. I analyzed the resulting information according to a qualitative-interpretive approach, and triangulated it to achieve credibility and validity. Although this paper is based on the case study of a single Jewish federation, its insights are pertinent for a wider understanding of other Jewish and non-Jewish philanthropies operating in similar rapidly changing environments. The conclusions of this case study illuminate processes by which these Jewish federations underwent transformations, as well as the ways in which they engaged with other organizations. The paper thus offers conceptual insights for understanding organizational adaptation among Jewish philanthropic organizations and their transformation over time (Salminen, Kauppinen, and Lehtovaara 1997; Seale 1999; Whitemore, Chase, and Mandle 2001).

Federated Fundraising Organizations: Functions, Structure and Power Politics

Jewish federations were established based on the organizational type of federated fundraising organizations, defined as an interorganizational coalition that strives to optimize resource allocation in a community or geographic area (Pfeffer and Leong

² Reinventing UJA-Federation: Raising funds for the implementation of Jewish values (American Jewish Historical Society–AJHS, September 1996): Subgroup VI; I-433/Box 6/Folder 33).

1977). The functions of federated fundraising organizations have been conceptualized as five roles that develop over time. The first role is as a fiscal intermediary that engages in raising and distributing funds through a predetermined formula. The second role is to serve as an economic regulator that supervises beneficiary agencies, setting standards and encouraging excellence and efficiency in their provision of services. The first two roles are an outcome of the chaotic setting in which these organizations evolved, characterized by the operations of multiple social services organizations at the turn of the 20th century. The federations operated within a system typified by a redundancy of the provision of services and fundraising from the community (Hendricks, Plantz, and Pritchard 2008). Organizations such as the United Way presented donors and human service organizations with a unique mechanism for promoting efficiency and effectiveness in the operation of a complex system of human service organizations (Litwak and Hylton 1962; Morris 2015; Seeley 1989; Todd 1932).

The federations' third role is to serve as a community problem solver that is integrally involved in community planning and prioritizing service provision. This role includes multiple functions, such as community planning; communal advocacy; and providing infrastructure, financial, and research services for the community and its institutions (Feldstein 1995). The fourth role is to serve as a charitable mutual fund. As the culture of giving has changed in recent decades, many federated organizations have taken on this role, offering philanthropic advisement and charitable investment options for donors (Billitteri 2000; Brilliant 1990; Brilliant and Young 2004; Gumz 2008; Paarlberg and Meinhold 2012; Seeley 1989; Young 2001). The fifth role, documented among Catholic and Lutheran federated organizations, is to act as faith community intermediaries, preserving and overseeing the religious identity of the organizations they fund (Wittberg 2013). This role has implications for individuals as well, as federated fundraising organizations enhance the connection between charitable giving and generating a sense of belonging within the community.

The evolution of federated fundraising organizations has taken place vis-à-vis the entanglement of organizational politics and power relations that have developed on interpersonal, intergroup, and interorganizational levels. On the individual level, the existence of multiple stakeholders with diverse interests provided the setting for a conflictual distribution of power that has been constantly challenged. On the intergroup level, it is suggested that these organizations reflect the socioeconomic stratification of communities in which they operate as they facilitate the dominance of elite groups over the raising and allocation of organizational resources, consequently perpetuating the elites' social, economic, and political dominance and conformance with their interests (Carter 1992; Clemens 2015). These arguments are refuted by some scholars who suggest that donor wishes and desires aren't always acknowledged by these organizations, leading to a constant power struggle between the professional management and the philanthropic-economic elite (Medding 1987; Raphael 1979; Weinberger 1971).

Another form of conflict exists at the interorganizational level as federated fundraising organizations are faced with the development of new organizations that undermine their dominance in the community (Perlmutter 1988; Weisner 1983).

Specifically, federated fundraising organizations struggle to maintain their external resources and legitimacy, even as alternative organizations specializing in ethnic groups, gender, and marginalized populations have developed to promote social and economic justice and to integrate innovative themes into their agendas and activities. Alternative organizations have arisen that focus on environmentalism, health, women's rights, the rights of African-American groups, and other topical issues (Barman 2007; Davis 1975; Dyl and Frant 2000; Raphael 1978; Teltsch 1985; Wenocur, Cook, and Steketee 1984).

The Adaptation of Federated Fundraising Organizations to their Changing Environments

The functions of federated fundraising organizations enumerated above suggest that the development of new roles over time can serve to capture and help to define how these organizations adapt to their environments as they strive to sustain and bolster their legitimacy and resources. The organizational adaptations can thus lead to changes in federations' functions, and they may contribute to the redevelopment of their underlying rationale for existence. In fact, theories that explore organizational adaptation processes offer explanatory power about the development of new roles and redefinitions of missions over time. According to adaptation theories, organizations attempt to adapt to changes in their external environments to ensure their survivability. Adaptation processes include an organization's efforts to understand its internal and external environments and its attempts to achieve conformity among them. These environments are made up of all the physical and social factors accounted for in decision-making processes within the organization, and they can include religious, political, and economic processes, as well as social tensions, values and norms, and regulatory changes (Duncan 1972; Chakravarthy 1982; Schmid 2009; Weick 1995).

Adaptation is a learning process in which an organization responds to stimuli from its environment, and then filters, codifies, and integrates information, as the organization learns about colleagues and competitors in its sphere of action and influence. At the same time, the organization scans its environment to assess needs to which it can respond, enabling the organization to develop new, creative mechanisms in order to adapt to changing demands and priorities (Schmid 2013; Senge, Kleiner, Roberts, Ross, Roth, and Smith 1999). Responses to changing environments can include expansion to new markets or the creation of new domains of organizational activity. These can include products, services, technology, and populations served by the organization, and they can reflect staff and management expectations of their roles and primary activities. The venture of creating a new domain of activity has the potential to have an impact on organizational identity, and it can lead to the continuing erosion of an organization's social, civil, and democratic mission (Davis and Cobb 2010; Mills, Thurlow, and Mills 2010; Popielarz and Neal 2007; Salimath and Jones 2011; Santon and Eisenhardt 2009). Adaptation theories provide a conceptual basis on which insights into the adaptation process of the Jewish federations can be explored. Therefore, these theories are

appropriate to utilize in considering how UJAFED has responded to changes in its environment by exploring developments in its domain of activities and its traditional and new roles within its community.

The Changing Environment of UJA-Federation of New York

Recent decades have brought about significant changes in UJAFED's environment. First, UJAFED has witnessed a noteworthy growth in the social and welfare needs of Jewish New Yorkers. This growth stems from the surge of Jewish immigration from the former Soviet republics during the 1990s that produced an increase in the number of young Jewish adults living in New York. At the same time, the number of Jews living below the poverty line increased. In 2011, this figure was estimated to be 19% of all Jewish households. Other demographic trends include the expansion of various groups within New York's Orthodox Jewish community, amounting to 20% of the city's population in 2011. Interesting trends were revealed among Hasidic (ultra-Orthodox) Jewish groups, which include the highest number of Jews (two hundred and thirty-nine thousand) in the New York area. The large number of low-income Hasidic Jewish households and their low levels of educational attainment and male workforce participation resulted in high rates of poverty, with 43% living in poverty and another 16% nearly poor (Cohen, Ukeles, and Miller 2011; Horowitz 1993). These trends have forced UJAFED to address the social and welfare needs of poorer and disenfranchised Jewish populations through the provision of services, such as financial support, employment and guidance services, health and mental health support, communal and family services, and other related services.

Second, the rise in the intermarriage rate, from 5% in 1960 to 25% in 2011, led to an increase in the number of interfaith families in the Jewish population. While intermarried couples represented 25% of New York City's Jewish population, only one-third of intermarried families were raising their children as Jews. This trend has been related to a measurable change in how Jews perceive their connection to the Jewish community; surveys indicate that Jews who are not affiliated with a formal Jewish denomination are the fastest growing group in New York City, increasing from 15% of the total Jewish population in 1991 to 37% in 2011. These changes have influenced the spheres of volunteering within the Jewish community and donating to Jewish organizations (Cohen, Ukeles, and Miller 2011; Della Pergola and Schmelz 1989).

Third, UJAFED has changed the funding patterns of its network's agencies. Since the 1980s, US government funding of human service agencies operating in the Jewish community has increased, resulting in a crowding-out effect, with corresponding reductions in federation allocations to human service agencies over time. An analysis of UJAFED annual reports indicates a decrease in the average share of federation funding of its network's human service agencies' annual budgets, from 60% in the 1970s to 30% in the early 1990s to a new low of 7% in 1997 (Dorff 2001; Solomon 1995). In fact, UJAFED funding now serves to offset differences between federation network agencies' expenses and public income

streams. As a result, major agencies such as the Federation Employment and Guidance Service (FEGS), which shut down in January of 2015, and the Jewish Child Care Association (JCCA) have significantly increased services for non-Jewish populations as they rely more heavily on government funding, reflecting other, broader human-service priorities (Soloway 2010). In addition, in recent decades, UJAFED has decreased its funding of national and international Jewish agencies. Like its peer, the Jewish Federations of North America UJAFED has maintained a long-standing tradition of supporting organizations that provide for the needs of Jewish communities around the world (Kosmin 1991; Waxman 2010). The Jewish Agency for Israel and the American Jewish Joint Distribution Committee (JDC) are prominent examples, both of which traditionally received 70% of their revenues from UJAFED's annual campaigns. These allocations declined to 40% in the mid-1990s, amounting to allocations of \$45 million, although these agencies had historically received dramatically more in financial support from federations in general and UJAFED in particular.

Fourth, significant changes took place in the task environment of UJAFED. Most prominent among these changes was the merger between the Federation of Jewish Philanthropies of New York and the United Jewish Appeal New York (UJA-NY) in 1986, which influenced organizational structures and produced major challenges. Prior to 1986, significant gaps existed between the Federation of Jewish Philanthropies of New York, which focused on communal planning, and the UJA-NY, which focused on the international arena in its fundraising and allocations. These differences were reflected in the merger agreement, which was insufficiently integrative and which sought to preserve each organization's interests and goals. Subsequently, throughout the 1990s, UJAFED management focused on integrating operating units and personnel, and on developing a mutual mission statement that encompassed the visions and ideologies of each respective organization (Austin 1996; Austin, Ahearn, and English 1997).

Finally, during the 1990s, UJAFED's management base was transformed as the organization witnessed changes in professional staffing, which included the hiring of new executives, graduates of Jewish institutions of higher learning, and individuals with professional experience established outside the traditional communal career ladder of the federation system. This cohort of new managers and executives expressed strong connections to their Jewish identity, and many identified themselves as members of the Conservative movement (one of Judaism's three main denominational streams). The changing characteristics of executives and senior managers are noteworthy in view of the departure from the profile of prior generations of UJAFED managers—primarily social work professionals who had developed and advanced their professional careers in the Jewish federated system. An executive of a major federation network service agency described the differences: “Among all the previous executives, the Jewishness was absent. The focus was almost exclusively on social services to the general community, with a grudging acknowledgment of the Jewish needs within New York.” UJAFED's new executive and senior management team established an organizational coalition that advocated for the importance of Jewish content within UJAFED and among its constituents.

The Adaptation of UJAFED to its Changing Environments

These significant developments forced UJAFED to adapt its core missions while ensuring a proper response to the changing needs of the community. Findings indicate that UJAFED has adapted to the changes described above by increasing funding for the provision of Jewish educational and cultural services, approaching a variety of new client-populations, and expanding activities beyond local communities to Israel. These developments, which I discuss below, have allowed UJAFED to create a new domain for its philanthropic activities and to prioritize its missions and goals.

Funding New Services: Jewish Education and Culture

Funding of Jewish educational and cultural programming shifted somewhat in the 1970 s, following protests by Jewish students at the annual General Assembly meetings of the Jewish Federations of North America. Among other issues, the protests focused on demands for increased funding for the Board of Jewish Education of Greater New York in a joint effort with UJA-NY (Austin 1996; Berger and Borowitz 1974; Sachar 1992). However, significant changes in the allocations of funds for Jewish education are a more recent response to growing rates of assimilation. The spike in reported intermarriage rates and reductions in affiliations is a phenomenon that the UJAFED leadership identified as a threat to the sustainability of Jewish communal life in New York. When Alan Jaffe, UJAFED's president in 1993, addressed his board of directors in March of that year, he stressed this point: "... it is conjectured that New York has a window of maybe 15 or less years to reach out to the post-Holocaust generation and avoid increased assimilation."³ Accordingly, UJAFED developed a sense of responsibility for creating and sustaining Jewish experiences and expressions of Jewish culture in its constituent communities. Moreover, philanthropically funded programs and activities were explicitly aimed at nurturing and strengthening both communal and individual Jewish identities. In the spring of 1993, UJAFED's Strategic Planning Committee recommended the expansion of appropriations to promote funds for Jewish continuity "...to sear the soul... [and] help to establish Jewish identity deeply and durably."⁴

This shift toward a broad mission of promoting Jewish continuity has been expressed mainly through the allocation of funds for Jewish educational and cultural programming. Data on UJAFED's allocations indicate a dramatic growth in the funding of programs, services, and initiatives aimed at promoting Jewish identity: From \$8.6 million in 1993, allocations rose to \$18 million in 1998, and then to \$37 million in 2012. In this relatively short period of time, UJAFED radically raised the

³ Alan Jaffe on the Jewish Continuity Commission as a designated organization. Minutes of the Board, March 18, 1993, (AJHS, Subgroup VI; I-433/Box 2/Folder 1).

⁴ Summary of the Proposed UJA-Federation Strategic Plan, April 1993 (AJHS, Subgroup VI; I-433/Box 2/Folder 1).

level of its appropriations for institutions perceived as being strongly focused on Jewish issues or as having agendas that would promote Jewish identity. These steps were backed by structural changes within UJAFED aimed at creating institutional support and legitimacy for the newly expanded mission. The federation established the Jewish Continuity Commission in March of 1993, funding it with a fixed annual budget of \$2 million. John Ruskay, then associated with the Conservative Movement's Jewish Theological Seminary of America, was appointed to develop the new commission. Ruskay exemplified UJAFED's new executive team, which encouraged broadening Jewish content in organizational philanthropy. By 1997, the commission had allocated more than \$5 million to 117 federation network organizations. That year, Ruskay came to this conclusion: "UJA-Federation can help reverse current trends of declining Jewish identity ... through projects with the potential to accelerate fundamental change in the capacity of key Jewish communal institutions."⁵

As the leading advocate for the importance of Jewish continuity as an organizational mission, Ruskay recognized the role of specific organizations as gateway institutions, pointing to synagogues, Jewish community centers, Hillel centers, and Jewish summer camps as the most important arenas for encounters between marginally affiliated Jews and mainstream Jewish communal life. In his 1994 letter to Jewish community researcher Gary Tobin, Ruskay wrote this: "Our efforts should be focused on how to reimagine and strengthen the primary institutions... in an effort to generate energy and new visions of what those institutions can be."⁶ Ruskay's leadership, as exemplified in this rationale, motivated shifts in appropriations to organizations that were explicitly dedicated to sustaining Jewish identity and continuity. In the same letter, Ruskay made this argument: "There is a need for the federation system to seriously reconsider its funding for human service agencies at this point in time [;]... someone needs to place this on the table so it can be thoroughly discussed."⁷ Ruskay's statement captures the debate between those who endorsed changes in UJAFED's mission, and those who supported the status quo, seeking to preserve the traditional commitments of UJAFED. The group of advocates for the status quo were comprised primarily of senior management and staff and lay leaders who had served the organization prior to the 1986 merger.

A critical step in institutionalizing UJAFED's support of Jewish education and culture was the establishment of the Commission on Jewish Identity and Renewal (COJIR) in 1999 as the successor to the Jewish Continuity Commission. Since its formation, COJIR has allocated more than \$235 million to 527 organizations. UJAFED declared its commitment to contribute \$300 million in matching grants to external contributions that were specifically dedicated to strengthening Jewish educational institutions and teachers. These examples indicate how UJAFED

⁵ Ibid. Ukeles Associates Inc., First fruit: An assessment of year one of the Jewish continuity grant program, January 1996 (AJHS, Subgroup VI, I-433/Box 7/Folder 15).

⁶ Letter from John Ruskay to Gary Tobin, August 16, 1994, UJA Federation, New York (AJHS, Subgroup VI, I-433/Box 8/Folder 34).

⁷ Ibid.

ventured into a new domain of services, catering to newly identified needs and dramatically increasing funding to provide Jewish content-based programs and initiatives. This action resulted in more than an expansion of activities. It expedited the creation of new organizational goals and targets, integrating them into UJAFED's declared mission in the hope of reaching new and previously untapped reservoirs of resources.

The Changing Relations between UJAFED and Synagogues

Traditionally, relationships between UJAFED and local religious institutions were strained and characterized by competitiveness and, at times, by rivalries over resources and populations served. This conflict was influenced by a traditional dichotomy between religious and secular, public and private, and local and cosmopolitan dimensions in the American context (Bernstein 1983; Dresner 1977; Leibowitz 1998). The shared challenges of Jewish assimilation facing the federation and local synagogues, which prompted structural changes in UJAFED, led to its closer cooperation with religious institutions. Specifically, UJAFED's recognition of the importance of Jewish institutions in creating Jewish continuity led to recognizing synagogues as pivotal gateways into Jewish communal and individual life.

In a 1990 speech, Barry Shrage, president of Boston's federation, the Combined Jewish Philanthropies, argued this: "Congregations must be viewed and view themselves as pivotal educational institutions in Jewish life. Properly conceptualized, funded, and structured, they can be powerful tools... [;] it is essential that we bring them into the newly conceptualized 'network' of community services."⁸ The UJAFED adopted this approach, which illuminates the conceptual framework for its changing relations with synagogues during the 1990s.

In 1997, the federation established the Kehillah Team, a special task force designed to explore UJAFED's relationships with synagogues. It recommended centralizing the role of the synagogue in the service of Jewish continuity. The task force report encouraged cooperation in order to enhance "the creation of an overall environment in which UJA-Federation is viewed as being a partner and supporter to synagogues rather than a competitor."⁹ The creation of dialogue between UJAFED and synagogues, and the new allocations for synagogue programs and initiatives have led to a gradual rapprochement. UJAFED's examples of these strengthening relationships include connecting 55 synagogues with Israel Experience programs that organize educational group trips to Israel, funding strategic consultations for 24 local congregations, and assisting synagogues with resource development to fund new initiatives and programs. In 2001, UJAFED allocated \$2 million to Synagogue 3000 (S3K), which aimed to transform 12 Westchester synagogues into Jewish interdenominational spiritual and moral centers. In 2008, UJAFED funded a

⁸ Barry Shrage, Federation/Agency Relations, Large City Federations Executives Winter Institute, March 18–22, 1990, Palm Springs, California (AJHS, Subgroup VI; I-433/Box 6/Folder 1).

⁹ Kehillah Team strategic report, August 17, 1997 (AJHS, Subgroup VI; I-433/Box 7/Folder 4).

strategic mapping process for Long Island synagogues in an attempt to enhance their efficiency and effectiveness. Recently, UJAFED institutionalized its engagement with synagogues through the SYNERGY initiative, with an annual budget of three hundred thousand dollars, to create partnerships with synagogues to promote their sustainability (Mann 2015).

This approach has transformed the way UJAFED perceives and engages with synagogues. Once viewed as venues for potential fundraising, synagogues are now perceived as central to the fulfillment of UJAFED's goals and targets, as well as reservoirs of future communal leadership. One central lay leader of UJAFED described the relationship this way: "The leadership of the synagogues are the same people who are active in the UJA-Federation."

Dilemmas Facing the Funding of Jewish Educational and Cultural Devices

Funding new services has challenged the normative and ideological foundations of UJAFED, which served for many years as New York's central philanthropic address dedicated to welfare and social causes. This generated several dilemmas. The first dilemma was the changing balance between UJAFED's Jewish and non-Jewish beneficiaries. As early as 1993, the federation's board of directors contemplated this issue from a strategic point of view. Advocates for balanced allocations, who were mostly pre-merger lay leaders of UJAFED, emphasized the importance of the setting in which UJAFED operated: "The ability of our organizations to serve the Jewish community is enhanced by our role in the entire non-Jewish community."¹⁰ On the other hand, those who supported the focus on Jewish continuity, primarily new executives and lay leadership who had recently joined the board, emphasized the need for a hierarchy in allocations: "It is important that priority be given to the provision of services to the Jewish community. While it may be important to help our non-Jewish clients, our agencies should not lose sight of the needs of our Jewish population."¹¹ Eventually, in the opinion of many interviewees, the long-standing commitment to non-Jewish beneficiaries was undermined. Many perceived this shift as resulting from the decision to increase allocations to Jewish-oriented organizations, which were mainly affiliated agencies dedicated to the provision of Jewish-based services, as well as to new organizations that received grants from the Jewish Continuity Commission and COJIR. Interviewees further claimed that this shift had altered the liberal and progressive image of UJAFED in the eyes of many of its supporters. One federation executive expressed it this way: "They forgot our community responsibility for non-Jews. We are Americans, after all. There is mission drift toward Reform and Conservative Jewish topics." A prominent lay leader of an affiliated agency came to this conclusion: "The federation has undergone a clear change, from a Jewish organization engaged in charity, to a Jewish organization engaged in charity for Jews."

¹⁰ Minutes of the Board meeting, April 29, 1993 (AJHS, Subgroup VI; I-433/Box 2/Folder 1).

¹¹ Ibid.

These developments aggravated the power struggle between UJAFED and affiliated agencies that provided welfare and social services mostly to non-Jewish clients. In an article published in the *Jewish Week* in August of 2009, Jerome Chanes discussed the dilemma leading to the conflict: “Why should federations subsidize day-school tuitions when the money could, and should, be used to help the needy — especially when we are in the grip of a recession;... the question remains: Is Jewish education discretionary, or is it a necessity?” These claims are confirmed through a study of UJAFED’s allocation of designated grants to programs on Jewish identity. Since 2000, the scope of grants allocated by COJIR has grown and is almost equal to grants by the Caring Commission devoted to social and human services in 2014, totaling \$16 million for Jewish continuity and \$16.7 million for human services. In the same year, the Commission on the Jewish Peoplehood, which supports collective Jewish identity, allocated \$8 million. Thus, total funds allocated for promoting new services, programs, and initiatives in the field of collective and individual Jewish identity totaled more than \$24 million in 2014.

A second dilemma involved the funding of the establishment of new Jewish educational and cultural organizations and the funding of new programs. This provoked resistance among existing organizations, which objected to UJAFED engagement in their perceived domains. One can understand the objectors as viewing the actions of UJAFED as an interruption of their activities, threatening to dominate their client-population and resources. A senior executive of the federation described the state of mind of leaders of these organizations during the 1990s: “What does the federation know about Jewish education? Nothing, but they have money, they’re arrogant, they’re scared, they’ve lost their *raison d’être*, so here’s a new crisis... [;] they’re going to get into the Jewish education business. Who are they to do that? I heard that over and over again.”

Finally, the expansion of funding for identity and community capacity-building services allowed the integration of new beneficiaries, primarily Jewish-oriented organizations, into UJAFED’s philanthropic agendas. This shift influenced relationships with UJAFED social and welfare agencies, both in terms of financial support and program emphasis. Research findings indicate a growing perception among federation network agency executives that UJAFED favors organizations that promote Jewish content and strengthen Jewish identity. This tendency is expressed in UJAFED network agencies’ perceptions as they attempted to align with its new agenda, described by many as “the Jewish test,” which considers an agency’s ability to serve as an incubator for initiatives cultivating a Jewish identity. An executive of a major UJAFED network agency discussed this expression: “The federation focuses on outcomes with specific objectives... [;] if you don’t have a Jewish constituency, you have to presume you’re out of the ball game.” An assessment of UJAFED’s network of some 100 affiliated agencies points to the fact the only seven agencies specialize in the provision of social services without any underlying Jewish content, whereas the rest possess, to varying degrees, a Jewish normative basis in their content and activities. This was illustrated in remarks by a major human service network agency executive: “[There] are baby birds at the nest with their mouth open and the mother comes with the worm. Which one is going to

get the worm? It's a very disparate power differential and it makes a lot of organizations jump to the music that federation puts on the table."

Engaging New Client Populations from New York Jewish Communities

The development of UJAFED's client-populations was intended to fulfill the new organizational missions among diverse Jewish populations of the city. This new emphasis supported organizational efforts to rejuvenate the federation's donor base. The donor base has decreased significantly in the past two decades, and it is now characterized primarily by affluent donors aged 65 and older. Therefore, the focus on expanding client-populations prioritized those that have the potential to contribute to increased organizational resources.¹² Populations new to UJAFED were perceived as potential clients in a range of roles, including beneficiaries, donors, lay leaders, and professionals, potentially expanding the organization's circles of support and legitimacy.

Outreach to new Jewish populations began in the early 1990s and continues to this day. Newly targeted populations have included the Russian-speaking community, comprising 14% of Jews living in UJAFED's eight-county service area in 2011; Orthodox communities (20%); Israelis (6%); non-white households (12%); the LGBT community (at least 5%); and Syrian Jews (2%) (Cohen, Ukeles, and Miller 2011). Programs tailored to population-specific social and educational needs were particularly evident in the case of programs for the Russian-speaking community, which were heavily funded to promote economic and communal integration. UJAFED programming was guided by the notion that the strong communal sensibility evident among Russian speakers from the former Soviet Union did not automatically translate into a strong Jewish identity. Therefore, alongside language and professional studies for Russian émigrés, UJAFED promoted Jewish communal identity through initiatives carried out in cooperation with local synagogues. In September of 2012, for the first time in 17 years, UJAFED integrated a new agency into its network, representing the Russian-speaking Jews. The Council of Jewish Émigré Community Organizations (COJECO), established as early as 2002 with the support of UJAFED, sought to preserve the heritage of Russian-speaking Jews. COJECO is part of UJAFED's Synagogue Outreach Network program, which is designed to engage young Russian Jews in synagogues of various denominations. These efforts encountered resistance among many members of the Russian-speaking community, who dismissed the notion that they needed to connect with their Jewish identity and who believed that they should integrate into the wider Jewish community in New York. An executive of one agency addressed this concern: "They couldn't really accept that, just because the Jewish community of New York or the federation helped you when you

¹² Direct Perspectives, UJA-Federation Donor Segment Profiles: Findings Summary, August 22, 1995 (AJHS, Subgroup VI; I-433/Box 1/Folder 16); Proposal to B. and L. Tisch, draft, March 8, 1996 (AJHS, Subgroup VI; I-433/Box 8/Folder 1).

came here, you would suddenly all be the same as so many other Jews that were much more observant in their lifestyle.”

The Modern Orthodox community also demonstrates UJAFED’s efforts to develop its client populations. It stands out in the context of UJAFED’s traditional governing structure, which had been made up of Reform and, later, Conservative Jews. One executive in an affiliated agency gave this explanation: “The Orthodox community is outside of the comfort zone of most of the federation leadership.” UJAFED’s focus on the significant Modern Orthodox community in New York represents a strategic decision. For more than two decades, outreach to the Modern Orthodox community had been discussed in organizational forums, leading to UJAFED’s evolving organizational ability to change its perception of the role of this population within its organizational culture and leadership.

The most prominent expression of this was the recent selection of Eric Goldstein to assume the position of CEO of UJAFED in July of 2014. Goldstein, an observant Modern Orthodox Jew, had been a philanthropist and prominent lay leader in UJAFED for several years. He had focused much of his philanthropic investment in Modern Orthodox communal and educational institutions. The extraordinary decision to appoint Goldstein was discussed in a recent article of *The Forward*: “For the federation of New York to get for the first time an executive who wears a yarmulke, that’s something unusual in the federation world” (Guttman 2014). In a recent interview in the *Jewish Week*, Goldstein was reported to have discussed the connections between Modern Orthodox Jews and UJAFED: “He said he feels a special responsibility to encourage his religious peers to become involved in the federation world, noting that they are ‘under-represented’” (Rosenblatt 2015). Goldstein’s appointment generated a lively discussion in the Jewish media and forums of communal leadership about the road chosen by UJAFED vis-à-vis the city’s Orthodox communities. It represented an organizational divergence from previous practice with regard to a population once estranged from UJAFED. One UJAFED executive made this comment: “They picked the Torah community that would be able to bridge the gap between the Torah community in New York and the philanthropic community.”

UJAFED’s strategic diversification of its client population has been flexible and dynamic. This is especially evident in its approach to the engagement of interfaith families, which has shifted within two decades. Interfaith families were formerly perceived by UJAFED as the hallmark of the assimilation and disintegration of the Jewish community, but they are now a part of its activities, enjoying organizational resources and programming support. In the winter of 2011, following in the footsteps of the Atlanta and Boston federations, UJAFED’s board of directors approved the report of the ad hoc Welcoming Intermarried Families task force, recommending organizational recognition of the importance of interfaith families in New York’s Jewish community. As an executive of one network agency put it, “Now the federation is talking about how do we engage interfaith couples? Clearly, if you keep rejecting people and you keep closing the doors on them, they’re going to leave.” Accordingly, UJAFED began to fund special programs for this population, including creating an online portal to connect interfaith families with Jewish content, and training the staff of agencies that work with interfaith families.

In the same spirit, UJAFED has prioritized the engagement of young Jews, who are viewed as potential philanthropic and communal leaders. UJAFED has activated professional circles of emerging financial communities with regard to promoting philanthropic investment, at the same time seeking to brand itself as a social organization that generates business opportunities. A lay leader from the financial community described the initiative this way: “Involvement in UJA is partly about doing well, but it’s a lot about networking.” Engaging new populations has brought diversity to UJAFED’s professional and lay leadership, altering the profile of the organization’s management and governing circles. As one prominent lay leader observed, “It’s no longer a small elite group of people who are running this organization. Today, there are a lot of people running UJA-Federation who are not New Yorkers and not one of those first German-Jewish families.” This diversification has also allowed for the proliferation of women in paid executive and voluntary leadership positions.

UJAFED’s efforts to reach out to traditional and new populations and its efforts to increase organizational diversity have allowed for the creation of a new domain of client populations. These efforts have broadened the scope of clients who enjoy UJAFED’s funding for various communal services and who have increased their involvement with network agencies and funded organizations. However, UJAFED has confronted challenges in reaching out to new populations, the central one being the engagement of multiple communities that differ significantly from one another. An agency executive summarized the situation this way: “New York is too big for one federation. The Jews living in the Upper West Side are so far from the state of mind of the Orthodox Jews living in [Long Island’s] Five Towns or Coney Island.” Moreover, explained one federation executive, UJAFED’s efforts were challenged by its ambition to act in consensus: “I think the big struggle of the federation is we want to be everything to everyone, and we haven’t quite given that up.”

Expanding Philanthropic Activities in Israel

UJAFED’s development of funding and program activities in Israel occurred as a direct result of the 1986 merger with the UJA. The merger facilitated the integration of Israel-focused missions into UJAFED’s newly revised mission statement. Beginning in the late 1980s, UJAFED set out to extend its philanthropic impact, focusing initially on Israel and later adding Eastern and Central Europe. Timing was an important factor, as the growing needs of Jews of the then-Soviet Union demanded that UJAFED engage in international rescue and resettlement efforts. Expanding funding and activities in Israel answered UJAFED’s organizational need to engage the lay leadership in new ways, building on their passion for greater involvement. In that sense, these changes also allowed UJAFED to access a new pool of potential donors.¹³

¹³ D. Sacks and S. Solender to the UJA-Federation community, Overseas Affairs Division, January 29, 1990 (AJHS, Subgroup VI; I-433/Box 6/Folder 1).

Much of UJAFED's investments and activities in Israel were motivated by its desire to influence decision-making processes, as well as to shape social and educational policy in Israel. As early as 1991, the board discussed UJAFED's contributions to liberalizing Israel's economic and financial policies: "New York should seek the creation of economic-development 'amutot' (non-profits) to encourage the government of Israel to liberalize their trade, tax, investment, and privatization policies in order to enhance the business climate."¹⁴ Engagement in Israel's political arena took place through back channels as well as in the manifest financial support of organizations that actively advocated for the separation of state and religion in Israel, gender equality, and effectively addressing political corruption. At the same time, UJAFED sought to create direct dialogue with Israeli parliamentarians through the *Kav Yashir* (Direct Line) program. Additional targets for UJAFED activity in Israel included the promotion of Jewish religious diversity and a Jewish renaissance, achieved mainly by doubling grants for Reform and Conservative beneficiaries and by encouraging the creation of educational programs supporting liberal denominations within Israel's predominately Orthodox expression of Judaism. Social services were now provided side by side with initiatives to sustain Jewish identity and to promote pluralistic approaches to religion, ethnicity, and gender.¹⁵

The relationship between UJAFED and local beneficiaries was reshaped based on a new perception of the needs of Israel, as described by an UJAFED executive: "Israel is no longer the Disneyland of the Jewish people. It is a real place and, as such, we must devote to it our energy." This statement points to the growing awareness of American Jews of the social, religious, racial, and political dilemmas faced by Israeli society and government, and the ambivalent approaches used to address those dilemmas. Moreover, the economic and technological surge Israel has experienced since the 1980s expedited changes in American-Jewish philanthropic priorities and activities involving Israel. Changes within Israeli society, including the intense growth of the Israeli third sector, prompted the mainstreaming of this approach. These factors led UJAFED to expect the Israeli government and local Israeli philanthropies to take a leading role in meeting social and welfare needs in Israel, freeing up UJAFED's capital for other goals and targets.¹⁶

UJAFED developed a rich and varied array of philanthropic channels, practices, guidelines, and oversight procedures with existing and new beneficiaries. It created an Israel Office, staffed by permanently appointed professionals who oversee local activity, demonstrating UJAFED's commitment to its newly expanded philanthropic territory. UJAFED's philanthropic activity in Israel was new in multiple ways,

¹⁴ Interim Economic Development Action Plan, October 10, 1991 (AJHS, Subgroup VI; I-433/Box 1/Folder 11).

¹⁵ Stephen Solender, UJA-Federation participation in fundraising for religious in Israel. December 30, 1997 (AJHS, Subgroup VI; I-433/Box 2/Folder 7); J. Solomon, July 8, 1997 (AJHS, Subgroup V: Oral History Project). UJA-Federation of New York Annual Report, 1990–1991, p. 16. Executive Committee meeting minutes, December 13, 1990 (AJHS, Subgroup VI; I-433/Box 1/Folder 14). Executive Committee meeting minutes, June 15, 1998 (AJHS, Subgroup VI; I-433/Box 2/Folder 7).

¹⁶ Stephen Solender, Jeffrey Solomon and Adam Kahan, Shaping a Jewish community renaissance for the 21st century, draft, June of 1995 (AJHS, Subgroup VI; I-433/Box 1/Folder 16).

characterized by changes in practices and methods of giving. UJAFED exemplified the professionalization of organizational philanthropy since the 1990s, influenced by developments in philanthropic practices of other groups in American society that advocate strategic and planned philanthropy (Helmut and Leat 2006). A director of an UJAFED beneficiary agency in Israel summarized the change: “The era when federation wrote checks and didn’t interfere was over. They decided to become involved and to learn exactly what is going on in Israel.”

UJAFED formally introduced its conceptualization of philanthropy in Israel at its October 1995 board meeting: “... [We] must continue to work with Israel, no longer just ‘for’ Israel.”¹⁷ Yet development of philanthropic practices took place alongside cutbacks in the allocation of funds to Israel, with funding decreasing from \$59.7 million in 1995 to \$22 million in 2009, and to \$18 million in 2013. At the same time, UJAFED increased its allocation of designated grants to fund specific programs and initiatives. Out of the total allocation of \$22 million to Israel in 2009, \$11.46 million was for designated (program-specific) grants, a sum that increased to \$14.1 million by 2013. This resulted in the erosion of unrestricted (core) funding for agencies in Israel, with the primary impact on UJAFED’s historic partners, the Jewish Agency for Israel, and the JDC, as mentioned earlier.¹⁸

A former executive of an affiliated agency described the outcomes of these developments: “Interestingly, the less attractive Israel was to the Jewish dollar, the more intense was the fight over involvement.” In fact, decreasing funding was, in a sense, replaced by growing organizational emphasis on funding local activities in Israel, as UJAFED strived to maximize the use and impact of each donated dollar. An important aspect in this context was the formation of new channels of giving to Israel. Examples of these shifts in emphasis include the Legacy Fund, established in 1988, which allocated more than \$20 million in its first two years of allocations, and the Overseas Supplemental Planning and Allocations Committee (OSPAC), which has focused since 1997 on key partnerships and collaborations with the Israeli government, municipalities, local non-profits, and philanthropies. These efforts have yielded long-lasting programs and projects in Israel, such as the ASHALIM partnership, which develops solutions and services for children and youth at risk; the Israel Trauma Coalition, which operates to create a continuum of care in the trauma field; Taglit-Birthright Israel, which provides immersive experiences for young Jews in order to strengthen Jewish identity, Jewish communities, and solidarity with Israel; and the Opportunity Fund for Civic Service in Israel.¹⁹

¹⁷ Minutes of the Executive Committee, October 3, 1995 (AJHS, Subgroup VI; I-433/Box 2/Folder 1).

¹⁸ Minutes of the Executive Committee, October 15, 1998 (AJHS, Subgroup VI; I-433/Box 2/Folder 8).

¹⁹ Minutes of the Board meeting, September 17, 1998 (AJHS, Subgroup VI; I-433/Box 5/Folder 5). Minutes of the Board meeting, December 1, 1994 (AJHS, Subgroup VI; I-433/Box 2/Folder 3); Jeff Solomon, June 25, 1997, United Jewish Appeal-Federation of New York Collection (AJHS, Subgroup V: Oral History Project); Sacks and Solender to the UJA-Federation community, Overseas Affairs Division, January 29, 1990 (AJHS, Subgroup VI; I-433/Box 6/Folder 1).

Challenges to the Development of Philanthropic Activities in Israel

UJAFED's funding agenda in Israel was designed to promote ongoing interactions among its executive echelon, stakeholders, and major agencies in Israel. The context of these interactions was a stream of American criticism over Israeli governmental policies and actions. In response to that criticism, UJAFED was faced with dilemmas and questions concerning its activities in Israel. New York's Partnership 2000, a collaboration between UJAFED and the Jerusalem municipality, illustrated these challenges and specific sensitivities regarding allocations beyond the Green Line (demarcation lines according to the 1949 Armistice Agreements). This contested agenda was discussed in the management's 1994 committee meeting: "As we go into Partnership 2000, we need to clarify the policy concerning the use of UJA-Federation funds throughout Jerusalem."²⁰ In this case, the committee resolved to limit allocation to within the Green Line, in response to the demands of certain major donors. The immediate outcome was a decrease in donations from the Modern Orthodox community.²¹

This dilemma reflects the existence of different and sometimes contradictory perceptions of UJAFED's role in Israel, even those evinced by individuals in prominent positions. The following arguments made by important lay leaders illustrate the conflictual setting in which UJAFED designs its Israel activities: "The minute we start telling them (Israelis) what to do, it fails, because we are not a political organization." Contrast this with an observation by another lay leader: "I think we have every right in the world to attempt to influence the way the Israeli government behaves." These conflicting views within the organization limit UJAFED's latitude in setting operational policy on complex issues relating to Israel. Objections on the part of long-standing beneficiaries to UJAFED's newly structured Israel philanthropy is yet another major challenge. UJAFED's international planning and allocations processes have had a significant impact on its beneficiaries. This is evident in the case of the Jewish Agency and the JDC, which have since developed sophisticated fundraising efforts that now compete with UJAFED's financial-resource-development activities.²²

The formative period of these philanthropic activities was significantly influenced by the involvement of lay leadership in various stages of the process of identifying needs, deciding on allocations, and sustaining connections with beneficiaries. As these processes were not always carried out according to an established or agreed-upon plan, it was observed by many interviewees that Israel had become the philanthropic playground of UJAFED, where trial-and-error philanthropy was taking place. Some further argued that UJAFED had failed to develop an influential philanthropy in Israel that achieves meaningful social impact. An executive of an agency described these perceptions: "They had no strategic guidance in anything except giving small funds to many beneficiaries." Many

²⁰ Lee Lowell to the "Management Committee, Summary of September 29th Meeting," October 11, 1994, (AJHS, Subgroup VI; I-433/Box 1/Folder 12).

²¹ Executive Committee meeting minutes, July 13, 1995 (AJHS, Subgroup VI; I-433/Box 1/Folder 15).

²² Stephen Solender (AJHS, Subgroup V: Oral History Project).

interviewees commented on the policy of allocating funds in Israel, including one federation executive who made this statement: “We are trying to sprinkle support and resources wherever we can.” As illustrated by research findings, the development of UJAFED’s activities in Israel has allowed for the creation of a new geographical dimension for its domain of activities, and has served organizational needs. This process has developed as UJAFED struggled to identify needs in Israel over the past 25 years, influencing the ways in which it has developed its philanthropy in Israel. Another UJAFED executive described it well: “The federation system is floundering in terms of its role in Israel... [.] there is an effort to reassert the role on the key issues facing Israel.”

Changing the Domain of the UJA-Federation of New York

UJAFED’s adaptation to its changing environment has occurred in three different dimensions: developing increased funding for Jewish education and culture, varying its client population with new and significant local Jewish communities, and expanding its philanthropic territory by developing activities in Israel. These developments have taken place in parallel with changes in the organization’s ideology and declared mission, as well as with attendant structural changes. The desire to reassert the role of UJAFED as an influential actor in key issues facing contemporary Jewish communities was interwoven into the development of this new domain, which allowed UJAFED to adapt to changes in its environments and to access new resources. As illustrated above, the adaptation has been an ongoing and dynamic process, generating multiple challenges and dilemmas. In fact, the success of domain creation relied on UJAFED’s ability to cope with obstacles in the various elements of the new domain and to exhibit flexibility in the allocation of resources to new initiatives.

By redefining its spheres of activity, UJAFED overcame major challenges to the organization brought about by changes in its environment. The agency achieved success in undertaking a new domain, to a great extent, as a result of the vision of the new management and the coalition it had formed advocating for the integration of Jewish content and activities into the organization. The success of the new management in securing internal legitimacy for its agenda provided the necessary support for implementing the agency’s new priorities. Organizational politics favored the new coalition and its priorities, thanks to the integration of new lay leadership into UJAFED’s activities by voluntary leaders who were free of the traditional conventions of UJAFED and of the former organizations that had been part of the 1986 merger. The absence of historical loyalties, along with a trend toward professionalization in voluntary organizations, facilitated the growth and integration of a new organizational management and institutionalization of the agency’s priorities.

The adaptation of UJAFED to the changing environment by domain creation is a strategy that has been documented among for-profit and not-for-profit organizations, and the subject requires further development and research in the context of philanthropic organizations. This strategy has major implications for shifts in the

goals and targets of these organizations (Hasenfeld and Schmid 1989; Schmid 2001, 2013; Tsasis 2009). The domain creation has changed the functions fulfilled by UJAFED as a federated fundraising organization that was once dedicated to operating a system of human service organizations and is now deepening its roots in the worlds of Jewish education, culture, and content.

UJAFED has created a new domain through unique processes aligned with its characteristics as a federated philanthropy. First, the process was influenced by its distinctive federated structure, which is distinguished by the size, scope, accessibility to diverse populations, broad donor base, holistic practices, and collaborative nature of its activities. These all contributed to the successful undertaking of domain creation by a variety of competitive and cooperative strategies, including collaboration, co-optation, entering a new niche, and differentiating itself from other types of grant-making organizations (Alexander 1996; Barman 2002; Burt 1983; Powell and Grodal 2005).

Second, the creation of a new domain was challenged by the underlying desire of UJAFED to act in consensus with various Jewish communities in New York, which limited its ability to face and act upon controversial issues, and also restricted the innovative behavior often associated with philanthropic actors. These actors are perceived as investors in innovative models of services, allowing philanthropy to be relevant to a wide range of clients and beneficiaries, as opposed to operating in a sectoral or differential manner. In the case of UJAFED, findings indicate that its organizational credo promoting consensual decision making may serve as a barrier to its desire to establish a new domain for its activities. The ongoing conflict between old and new management, as well as the conflict of UJAFED with its network of affiliated social services agencies, highlights the difficulties of operating in consensus. In this context, the discussion on the changing decision-making processes within UJAFED, and the inclusion of non-donor, non-professional participants in decision making on the allocation of funds merits further exploration.

Third, the process of domain creation was shadowed by dilemmas generated by the multiple roles of UJAFED's clients, who include stakeholders of the organization, consumers of services, volunteer leadership involved in governance, and donors with a strong say in decision making. Moreover, these clients serve, at times, as a connecting link between UJAFED and its network of agencies and other beneficiaries, thus creating situations of multiple and sometimes conflicting interests. Therefore, the extent to which the new domain has achieved consensus among its various constituents is yet to be determined. Another dimension of these dilemmas is the fact that UJAFED did not secure its grip on new financial resources for the long term, indicating a lack of external legitimacy for its new domain. For example, financial resources dedicated to the provision of services to the Russian-speaking community decreased significantly in the late 1990s. In addition, resources designated to deal with growing assimilation were reduced following the publication of new data indicating a standstill in the rates of intermarriage among New York Jews.

Fourth, the creation of a new domain has had significant implications for the relations between UJAFED and its sister North American federations and synagogues — implications that require further exploration. Almost two decades

have elapsed since the inception of this development, leading to significant differences in the perception of synagogue roles and involvement in UJAFED activities. There is a gradual movement toward collaboration with synagogues, expressed in the growing interface between lay members and donors from both sides. These newly formed connections are groundbreaking in the context of UJAFED's organizational history, which previously did not inject religious values into its activities. The case of UJAFED and its rapprochement with local synagogues illuminates the changing balance between communal institutions and their evolving reciprocity. Future research is needed to focus on the mutual influences of these institutions on processes of organizational change and conformity.

Finally, the creation of a new activity domain allowed UJAFED to implement its newly assumed role in sustaining the ethnoreligious foundations of the community. Assuming new roles strengthens federations' viability in Jewish communal life and repositions federations within the landscape of Jewish communal institutions. The development of new roles has been promoted within UJAFED by the new executives who served as brokers for new ideas, values, and norms. The development of new roles that transcend traditional functions can facilitate organizational engagement in entrepreneurship as the organization engages with its environment, functioning as an institutional agent with the capacity to influence organizations operating in its field, according to the organization's values and interests. Topics for future research include the successful implementation of these roles, their contribution to the sustainability and long-term viability of UJAFED in particular and for the Jewish federation system in general, and their resemblance to similar roles among federated fundraising organizations.

The insights drawn from this research contribute to developing a theoretical understanding of the unique adaptation process of federated fundraising organizations. They suggest that the process undergone by UJAFED has been carried out in a unique way and has had implications for intraorganizational characteristics and organizational identity. The insights point out that the adaptation process of federated fundraising organizations is modular and differential, expressed in the variations of the adaptation of each organizational unit and especially in the organizations' two central arms — fundraising and the allocation of resources — operating in a separate and somewhat detached mode. As expressed in the case of UJAFED, modular adaptation varies among organizational units, including fundraising, resource allocations, human resources, management, marketing, research and strategic planning, external relations/governmental relations, and other units.

Findings suggest that the adaptation process of federated fundraising organizations is applied to the system as a whole, affecting both the central organization and its beneficiary agencies. All elements of the system are influenced by the outcomes of the adaptation process, but they do not always have the ability to influence the formulation and implementation of the process. The adaptation process may change the definition of roles within the system, in the division of labor within the central organization, and among its network of affiliated agencies. The process also has an impact on human resource functions and its circulating movement within the

organization, resulting in influences on levels of oversight and regulation within the system.

The adaptation process documented in this study suggests the important implications of changes taking place among Jewish philanthropies for local human service organizations, and, more broadly, for Jewish and non-Jewish communities. Changes to the channels of giving, the development of new missions and goals, and their implementation by using new and innovative strategies have resulted in shifts in Jewish grant-making patterns and in the development of new roles for Jewish philanthropies. Future research can develop this knowledge by providing a comparative perspective for understanding the changing nature of Jewish philanthropy — first, by exploring the changes in grant-making patterns among multiple types of Jewish philanthropies. This exploration can provide a structural analysis of changes within the Jewish communal system and its institutions, as well as develop insights on their newly formed mission focus. Second, these changes should be explored in a broader setting and in comparison to other ethnoreligious philanthropies. A comparative analysis of grant-making patterns of Jewish, Latino, African-American, Asian, and other ethnic philanthropies can enhance our understanding of the emerging connections among ethnic philanthropy and place-based and faith-based philanthropy and the implications of those connections for the communities they serve and their regions of activity.

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