Ethno-Religious Philanthropy: Lessons from a Study of United States Jewish Philanthropy

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Abstract

This article discusses methodological challenges to the study of Jewish philanthropy. Based on a study of US Jewish-founded grant-making organizations between 2000 and 2015, the article examines existing and recently developed methods used in research about the philanthropic organizations of the Jewish community and the structure of their philanthropic activity. The authors discuss methodological dilemmas concerning the inclusion and exclusion of data and the double-counting of grants, and explore the methodological implications of the growing importance of donor advised funds. The article proposes a new methodological approach for the study of Jewish institutional philanthropy, emphasizing the identities and backgrounds of the funders in identifying Jewish philanthropies rather than limiting the definition of Jewish philanthropy based on the goals and activities of the recipient organizations.

Keywords Jewish philanthropy · Community philanthropy · Donor-advised funds · Grant-making organizations · Faith-based philanthropy

Introduction

This article considers the scientific study of the philanthropic activities of the Jewish community and the challenges such an inquiry presents. Based on a study of US Jewish philanthropy, we discuss the methodological challenges and barriers to researching the grant-making activities of ethno-religious groups, defined as groups with both ethnic-secular and religious characteristics (Gans 1994). Many communities with a shared ethnicity, faith, country of origin, or other attributes develop

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successful philanthropic networks (Sacks 2014). These networks operate to promote community development and represent a viable financial and material resource to local states and charities (Mehta 2016). While community philanthropy is rooted in notions of giving by and to local communities, but its definition remains vague or variously defined (Phillips 2018). This happens, in part, because the philanthropic activity of communities combines both institutional and informal forms of giving, such as Jewish federations; group-specific entities like women's funds; giving circles; granting collaboratives; and self-help agencies (Knight 2012).

The structure and practices of community philanthropy are influenced by geographical and organizational proximity of community members to their institutions, which facilitates the creation of philanthropic resources. Julian Wolpert (1995, 1999) emphasizes how community philanthropy is embedded in specific communal characteristics and social settings. By supporting social and welfare programs, the community becomes resilient and sustainable, and enhances ability to provide philanthropic support (Glückler and Ries 2012). Ethno-religious traditions appear to be important influences (Joseph 1995), as are migration and settlement patterns (Elazar 1984). Finally, social norms and social class relations affect the principles and patterns of philanthropic behavior of local organizations (Shrestha 2017).

Studies on charitable giving by communities with a shared faith or ethnicity have flourished in recent decades and tend to point to changing social dynamics within these communities and the development of unconventional revenue streams that are contesting the "orthodoxies" of traditional philanthropies. Scholarship has examined the giving patterns of ethnic groups (see, for example, Cortés 1995; Moon et al. 2015; Vallejo 2015; Khan 2016; Mehta 2016) and, to a lesser extent, the philanthropy of ethno-religious groups (Dusenbery 2009; Brinkerhoff 2016; Wertheimer 2018). These studies document the scope, motivations, and trends in giving to religious, ethnic, and diasporic causes and explore the impact of social, economic, and political changes in the communities on their philanthropic activity.

The increasing number of studies is partly the result of the recent availability of large datasets on grant making. Considerable latitude for the study of giving trends at the communal, regional, and international levels is now possible. The analysis of large datasets is frequently hampered, however, by the lack of a clear definition of community membership and philanthropic activity. As a result, trends, channels, and new forms of giving are sometimes misinterpreted. The study of US Jewish philanthropy is not exempt from these challenges. Channeled through a network of institutions engaged in local and international grant making, these organizations operate within shifting social conditions that affect their grant-making activity. Studies on Jewish philanthropy have examined faith institutions, ethnic and cultural settings, and historical circumstances. These studies differ in their methodological approaches to understanding Jewish philanthropy. Most importantly, they give scant attention to the basic challenges of how to define the Jewish philanthropic sector: which organizations count as Jewish philanthropies and what defines Jewish grant making.

Any study of the giving patterns of an ethno-religious community involves understanding which organizations and grant-making activities constitute part of that group's philanthropy. Defining Jews and Jewish philanthropy is a difficult but

necessary prerequisite for understanding Jewish institutions and their grant making. Demographers and sociologists have suggested different criteria for defining Jewish individuals and deciding whom to include as Jewish in demographic studies. Various inclusion and exclusion criteria have rested on Jewish law, Israeli law, and stated religion (DellaPergola 2013; Saxe and Tighe 2013; Phillips 2017). This article attempts to address those issues while drawing from our big data study of grants made by US-based Jewish organizations between 2000 and 2015. For the purpose of this study an organization was defined as Jewish if it was formed by an individual, family, or group who identifies as Jewish or has a Jewish background and/or connections to the Jewish community.

It uses the research process primarily to shed light on the central methodological challenges in the research of Jewish philanthropy and presents dilemmas in the study of Jewish philanthropic giving that arise from data mining and analysis of large datasets. Therefore, it does not discuss the analytical process in detail nor does it delve into the findings, except to illustrate certain points. The article offers a systematic approach to identifying the sector of Jewish grant-making organizations and a means to analyzing the unique pathways by which their grants are channeled. Finally, the article contributes to the developing approaches for the study of community philanthropy.

US Jewish Philanthropy

The networks of Jewish funding organizations include multiple types of organizations such as private family, corporate, and supporting foundations; public foundations such as the Jewish federations and community foundations; secular and faith-based organizations; and friends, umbrella, and pass-through organizations. A survey of the scholarship on the philanthropic activity of US Jewry falls into four categories. One set of studies focuses on socio-historical and organizational aspects of Jewish philanthropy, in particular the development and changes to the system of Jewish federations and the United Jewish Appeal in the broader context of US political, economic, and legal institutions (Raphael 1982; Waxman 2010; Lainer-Vos 2014; Berkman 2017; Berman 2017). The research emphasizes how these organizations brought together different groups in the Jewish community and facilitated social and economic mobility (Moore 1978; Wenger 1996). This set of studies explores Jewish institutional grant making by focusing on inward giving.

A second group of studies focuses on changes in the levels and frequency of individual charitable giving, giving patterns to the federations and to Israel, and contributions to non-Jewish causes (Tobin 1992, 1994). Some of these studies focus on characteristics and personal attributes associated with individual giving to Jewish causes, including age, income, marital status, synagogue membership, ritual observance, denomination, and social ties (Ritterband 1991; Cohen 2004; Dashefsky and Lazerwitz 2009; Mesch et al. 2010; Gerstein et al. 2013; Cohen and Landres 2014). Recent Jewish community studies explore individual giving to Jewish causes (see, for example, Lugo et al. 2013; Sheskin 2017), while other studies examine giving by Jewish mega-donors (Tobin and Weinberg 2007b) and Jewish women

philanthropists (Einhorn 2012), as well as generational characteristics of Jewish giving (Lerner 2011). This set of studies explores all types of philanthropic behavior by individual Jews that are directed toward the Jewish community or outside of the community.

A third category of research highlights the influence on giving trends of factors outside of the Jewish community. These developments include the growth of non-Jewish organizations appealing to Jewish donors (Sternberg et al. 1992; Kosmin 1995), and the creation of a new generation of philanthropists who seek to generate measurable results. The studies point to the creation of new niche-focused philanthropies designed to achieve narrow and well-defined goals that also challenged traditional philanthropic structures (Fleisch and Sasson 2012; Shaul Bar Nissim 2018). These studies explore all giving by Jewish philanthropic organizations, focusing on their practices rather than on the nature of their goals and missions.

Finally, research focuses on Jewish diaspora philanthropy and depicts the complex structure of Jewish fundraising organizations (Stock 1987; Gal 2010; Fleisch 2014; Shaul Bar Nissim 2019). A handful of studies attempt to estimate the changes to the scope of contributions transferred to Israel and the goals and targets they supported (Fruehauf 1991; Kosmin 1995; Cohen and Bubis 1998; Tobin and Weinberg 2007b; Fleisch and Sasson 2012; Sasson 2013; Shaul Bar Nissim 2019). These studies explore inward giving and in particular pro-Israel causes, neglecting to document the growing philanthropic activity toward non-Jewish causes in Israel.

Methodology

Research Setting

The research included the collection and analysis of financial and organizational data from private and public foundations, service providers, and advocacy and faith-based organizations. For the purpose of this research, an organization was defined as Jewish if it was formed by an individual, family, or group who identifies as Jewish or has a Jewish background and/or connections to the Jewish community. Jewish identification or background refers to religious or ethnic expressions, as discussed in the section "What is Jewish philanthropy?" below. It is important to note that the definition we propose for a Jewish organization is not incumbent upon founders' active expressions of Judaism, such as ongoing affiliation or engagement with synagogues and other Jewish community institutions, or faith-based and spiritual behaviors and expressions. Rather, our definition entails a Jewish lineage or self-identification, based on expansive definitions of being a Jew.

Research Population

A comprehensive list of US Jewish grant-making organizations was created using databases of nonprofit and charitable organizations that pool data from Return of Organization Exempt from Income Tax (990 forms), annual reports, websites, and

media publications. The list of potential organizations was further expanded to include those private foundations with Ashkenazi, Sephardic, and Israeli distinctive Jewish names (DJNs); flagged institutions were individually researched to determine the Jewish backgrounds of their founders. As the use of DJNs in local community studies is contentious, and critics of the method cite a lack of generalizability to the entire Jewish population (Ukeles 2016), DJNs in this study were used to indicate prospective candidates for inclusion, not as a final criterion. The authors explored the religious and ethnic backgrounds of the founders of organizations with which they were not familiar. DJNs were complemented by keyword variations—including Jewish, *Zion*, *shalom*, *tikkun*, yeshiva, Israel, *chesed*, *tzedakah*, *terumah*, and others—searched in the organizations' names, key missions, main areas of donation, annual reports, media mentions, Wikipedia entries, reports on projects, and programs. Additional searches were conducted for all organizations engaged in direct grant making to Israel. Finally, other scholars provided information that informed the classification process.

This step was followed by a search process using *Foundation Search*,[1] an online keyword searchable database of over 125,000 foundations in the United States. This search was conducted to expand the research population and to retrieve information on grants made by each organization on our list. In this database, each entry can be viewed by grant, grantee, or grantor. The data-mining process included applying strings of Boolean keyword search terms related to the name, location, and size of the funding organization; giving interests; main areas of activity; grant descriptions; geographic scope; names of directors; connections of the directors to other funding organizations; and names of the recipient organizations. Overall, 59 search strings designed to include all declared philanthropic activity of Jewish organizations toward various causes were developed and applied to the database. These strings included specific connector words, excluded noise words, and, depending on the string, excluded specific words. Data mining in this specific module allowed keywords to match a pre-defined number of characters and matching between words, phrases, word stemming, fuzzy searches, phonic searches, and variable term weighting. The following strings provide examples for search terms used in this process.

This DJN string yielded over 142,000 grants:

> *baron* or *blum* or *thal* or *sky* or *bucks* or *witz* or *vitz* or *meir* or *wartz* or *schein* or *samuel* or *berger* or *taub* or *heim*

This country string yielded over 7,500 grants:

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[1] http://www.foundationsearch.com/Index.aspx.

> *Recipient country is Israel*

This Jewish keyword string yielded over 132,035 grants:

> *Foundation name matches jew* or israel* or tikun* or*
>
> *shalom* or zion**

This Jewish keyword string yielded over 35,682 grants:

> *Recipient name or grant description matches synagogue* or kehilat* or kolel**
>
> *or yeshiva**

The initial list included 21,034 funding organizations. Employer identification numbers (EIN) were collected for all funders and recipients to ensure unique identifiers for each organization and thus avoid double-counting due to variations in organization names, which are not standardized across 990 forms. Out of these 21,034, the personal, professional, and philanthropic activities of the organizations and the people who founded them were researched to determine if the organizations fit the research definition of a Jewish organization presented above.

To confirm that the funding organizations were identified and/or affiliated with the Jewish community and that the data was not compromised by outliers, the authors performed a detailed examination of the 100 largest organizations. Total expenditures for these organizations ranged from $69 million to $2.5 billion.[2] This examination determined that these funders have a clear orientation toward the Jewish community through personal or institutional identification and/or grant-making activities. Of the 100 largest organizations examined, only 16 funders did not make any grants to Jewish organizations but have Jewish founders, including George Soros' Open Society Institute, the George Kaiser Family Foundation, and the Bloomberg Family Foundation, which were therefore not included in the database.

The need to look at the organizations' founders and not just the names of the organizations to identify Jewish funders is demonstrated by the small number of funders whose names clearly indicate that they are affiliated with the Jewish

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[2] Here and throughout this article, all dollar figures are adjusted to 2015 for direct comparability.
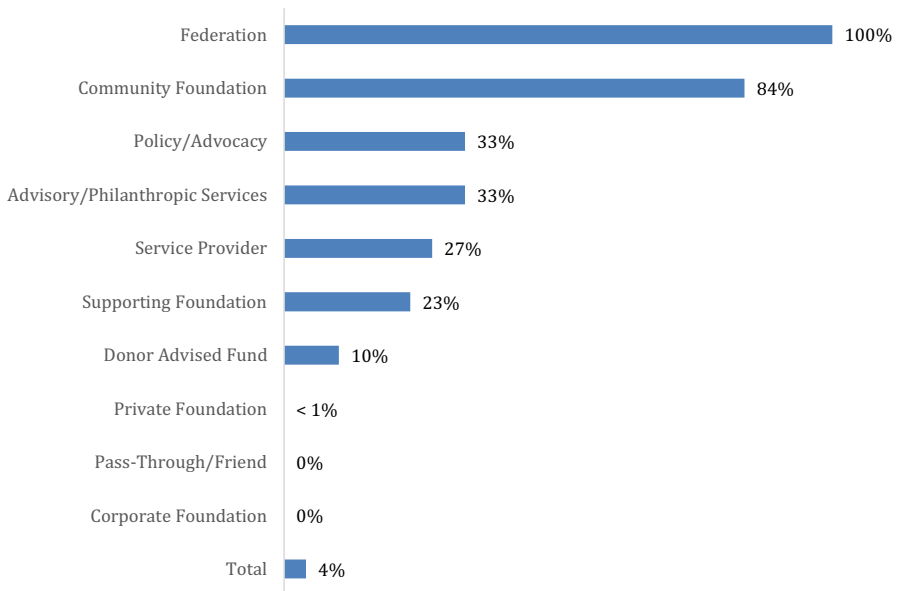
Fig. 1 Grant-making organizations with "Jewish," "Jew," or "Judaism" in Name

community. Out of 1235 Jewish grant-making organizations that made grants larger than $500,000 between 2000–2015, only 4% (51 total) have the words "Jewish," "Jew," or "Judaism" in their names. The remaining 1,184 organizations were otherwise identified as Jewish and added to the research population. Although private foundations in our sample tend not to include "Jewish" in their names (less than 1%), some other types of foundations do, including 23% of supporting foundations. While the keyword search proves an effective method for gathering information on private and public foundations, it is not useful for donor advised funds, which maintain donor anonymity, thereby precluding the identification of donors as Jewish. Donor advised funds will be discussed in detail below. Figure 1 shows the proportion of organizations with the words "Jew," "Jewish," or "Judaism" in their names by type of grant-making organization.[3]

Data Collection

Data was mined using *Foundation Search* for grants larger than $500,000 made by organizations on the list between the fiscal years 2000 and 2015 (representing the years for which complete digitized Form 990 data is available). The data included a comprehensive set of measures for each grant entry: name, EIN, and location (city,

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[3] See below for definitions of grant-making organizations.

Table 1 Classifications for grant-making organizations

Type of organization	Example
Private foundation	Charles and Lynn Schusterman Family Foundation
Corporate foundation	Weil, Gotshal & Manges Foundation, Inc.
Donor advised fund	Jewish Communal Fund
Supporting foundation	Mandel Supporting Foundations
Community foundation	Jewish Community Foundation of San Diego
Federation	Jewish Federation of Cleveland
Pass-through/friends	American Technion Society
Service provider	Jewish Family Service Association of Cleveland
Policy/advocacy	Anti-Defamation League
Advisory/philanthropic services	Jewish Funders Network

state) of the funding organization; name, EIN, and location (city, state/country) of the recipient organization; grant amount; grant year; and grant description, as available which ultimately yielded 21,062 grants totaling $46.3 billion originating from 1235 Jewish funding organizations. Coding for the funding organizations was based on the National Taxonomy of Exempt Entities-Core Codes (NTEE-CC) Classification System.[4] This technique allowed for a clear distinction between several groups of grant-making organizations as presented in Table 1. The United Nations International Classification of Non-profit Organizations (ICNPO)[5] was used to classify recipient organizations.

The analysis focused on the number and size of grants, in total and over time, categorized by a variety of organizational characteristics of funding and recipient organizations. Data was analyzed to describe each organizational philanthropic profile (for funding organizations) or activity profile (for recipients), and to examine internal differences between organizational forms.

Findings

What is Jewish Philanthropy?

In defining Jewish philanthropy, there are two important considerations: the first being the definition of a Jewish organization as discussed above, and the second being the definition of Jewish philanthropy. First, in order to understand most fully the characteristics of Jewish institutional grant making, this article uses a wide definition of Jewish organization by including all organizations that have a founder or founders with an ethnic, religious, or communal connection to being Jewish. This approach is inclusive of individuals with a Jewish religious or ethnic

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[4] For further details, see: https://nccs.urban.org/classification/national-taxonomy-exempt-entities.

[5] https://www150.statcan.gc.ca/n1/pub/13-015-x/2009000/sect13-eng.htm.

identity and at least one communally acceptable background criterion, such as parentage, religion in which raised, or conversion (see, for example, Cohen et al. 2012; Lugo et al. 2013; Aronson et al. 2018). As mentioned above, this definition does not entail an active reference to Judaism by the institutions' founders.

Second, in the case of what constitutes "Jewish" philanthropy: Here again, studies of individuals are instructive. Most studies that explore philanthropic behavior by individual Jews also include donations made to organizations and causes that are not associated with the Jewish community (see, for example, Cohen 2004; Mesch et al. 2010; Sheskin 2017). The totality of where Jews donate is emphasized in these studies, not just inward giving. For example, the *Connected to Give* reports explicitly define Jewish giving as including all giving by a Jewish individual, without regard to the recipient organization (Gerstein et al. 2013).

This article offers a combined definition for Jewish institutional philanthropy, defining a Jewish grant-making organization as one formed by an individual, family, or group that identifies as Jewish or has a Jewish background. Tobin and Weinberg (2007a, b) used this approach on a smaller scale for their studies of Jewish individual and institutional giving. Our research implements Tobin and Weinberg's approach toward a comprehensive national research and validates its use in quantitative data-based methodology.

However, more recent and comprehensive studies that explored organization-based Jewish philanthropy limited their discussion to funders that give to organizations that identify as Jewish or are actively associated with the Jewish community (see, for example, Burstein 2011; Wertheimer 2018). This limits the scope of research for two reasons. First, doing so glosses over the scope and impact of grant making by Jewish funding organizations, the majority of which originates from private foundations and functionally can be considered as individual giving. In the same way, Jews who give to organizations that are not Jewish would not be excluded from a study of Jewish donors, so too foundations created by Jews should not be excluded from a study of Jewish grant making. Second, funding priorities shift over time and a foundation that does not currently make grants to the Jewish community can choose to do so at a later point in time. For example, one of the foundations excluded by Paul Burstein (2011) for not appearing connected to the Jewish community made a grant to a yeshiva in Brooklyn in 2013, subsequent to Burstein's publication. This demonstrates the distinction between organizations immersed in the Jewish community, which past studies have focused on, and organizations funded by Jews, which is the topic of this study.

In addition, because private foundations are founded by individuals and differ from public-communal organizations in their decision-making processes (Feliu and Botero 2016), private foundations founded by Jews should be considered in the same way that Jewish donors are. Rather than focusing on the goals and activities of the recipients, the approach of this article relies on the identities and backgrounds of the funders. This argument is especially relevant in light of our findings on institutional giving, mirroring those of earlier studies about individual giving, which found that more Jews give to non-Jewish organizations than to Jewish ones (see, for example, Tobin and Weinberg 2007b; Gerstein et al. 2013). In the present study, grants to

Table 2 Comparison of inclusion criteria: dollars allocated by type of organization

Type of organization	Giving only to Jewish causes (%)	All giving if any Jewish cause (%)	All Jewish funders (%)
Private foundation	34	59	64
Corporate foundation	3	2	3
Donor advised fund	12	6	5
Supporting foundation	<1	<1	<1
Community foundation	8	9	8
Federation	4	3	3
Pass-through/friend	3	2	1
Service provider	35	18	15
Policy/advocacy	1	1	1
Advisory/philanthropic services	<1	<1	<1

Jewish causes made by Jewish organizations comprise only 38% of the total grant dollars in the research sample. If the scope was expanded to include all giving by Jewish organizations that made at least one grant to a Jewish cause, those organizations' total grants would represent 84% of the total grant dollars in the database. This, however, still excludes the 16% of dollars given by Jewish funders that support only non-Jewish organizations and would therefore ignore the significant number of Jewish organizations that do not donate to Jewish causes. Even among Jewish funders that gave to both types of causes, the majority of dollars (62%) went to non-Jewish organizations.

An examination of Jewish grant-making institutions reveals that 24% gave only to Jewish organizations, 48% gave only to non-Jewish organizations, and 29% gave to both Jewish and non-Jewish organizations. In other words, about half of the funders in the database made a grant to a Jewish cause, but about three-quarters made a grant to a non-Jewish one. Of the 100 largest givers, two gave solely to Jewish causes, 16 gave solely to non-Jewish causes, 20 gave more to Jewish than to non-Jewish causes, and 62 gave more to non-Jewish than to Jewish causes. Table 2 displays the proportion of dollars granted by each type of funder using the three-inclusion schema: by Jewish funders that gave only to Jewish organizations, by Jewish funders that gave to at least one Jewish organization, and by all Jewish funders. The table demonstrates that using less inclusive definitions of Jewish philanthropy, based on the recipient organizations would underestimate the financial power of private foundations and overestimate the importance of donor advised funds and service providers.

The Structure of US Jewish Philanthropy

There are multiple types of organizations that constitute the network of Jewish grant makers. The network is composed of older and newer forms of funding organizations and can be divided into five groups:

Table 3 Share of organizations, grants, and dollars by type of organization

Type of organization	% of Organizations	% of Grants	% of Dollars
Private foundation	81	70	64
Corporate foundation	9	5	3
Donor advised fund	1	7	5
Supporting foundation	2	2	<1
Community foundation	2	3	8
Federation	2	11	3
Pass-through/friend	3	1	1
Service provider	1	1	15
Policy/advocacy	<1	<1	1
Advisory/philanthropic services	<1	<1	<1

(1) Private funds contributed through family, corporate, and supporting foundations, e.g., The Lillian Jean Kaplan Foundation and the Mandel Supporting Foundations

(2) Public foundations that often have dual roles of raising and allocating funds, e.g., the Jewish Federation of Cleveland and The Foundation for Jewish Philanthropies

(3) Secular and faith-based organizations that provide services or engage in advocacy, e.g., the Jewish Funders Network and the Open Society Institute

(4) Friends, umbrella, and pass-through organizations, e.g., the American Technion Society and the New Israel Fund

(5) Public foundations that are sponsors of donor advised funds, e.g., Jewish Communal Fund

Table 3 displays the different types of organizations, indicating the share of organizations, grants, and dollars they represent in the database.

Private foundations comprise the majority of funding organizations and provide the most grants and dollars. While corporate foundations are the next largest group of funders, both federations and donor advised funds give out larger shares of grants and dollars. Federations, constituting only 2% of funding organizations, give 16% of the dollars. Another type of Jewish grant-making organization includes friends, umbrella, and pass-through organizations that serve as conduits for the transfer of funds to international recipients. The most recent study indicates substantial growth in their number, although it is not clear what percentage of the funds distributed to Israel is channeled through these organizations (Fleisch and Sasson 2012). These organizations usually bear the names of the organizations they support, e.g., American Friends of IDC, which supports IDC Herzliya. They require a separate set of search terms such as "Friends of" or "Friends."

Traditionally, clear differences existed between the various types of funding organizations, including a division of missions and goals. In recent decades, mirroring broader US voluntary sector trends, the boundaries between them have blurred, and they are assuming roles they did not have in the past (Young
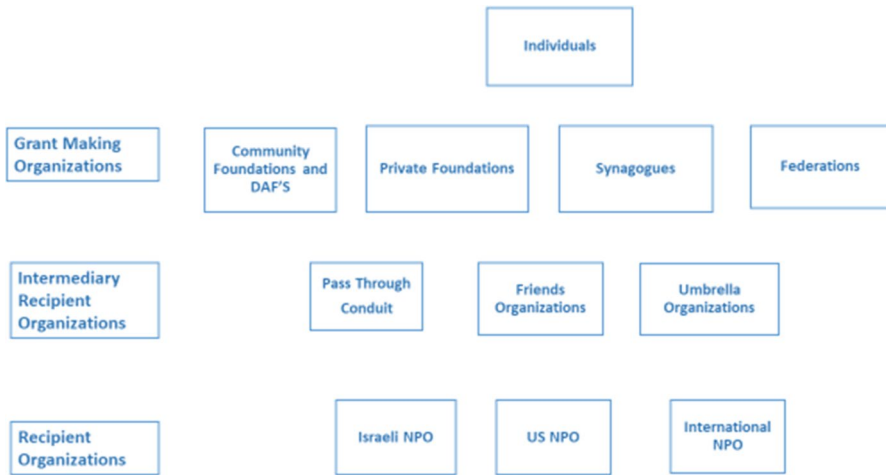
Fig. 2 Flow of Jewish philanthropic dollars

2001). Many fill overlapping functions: Foundations have taken on an increased role in operating programs, and federations fund other nonprofits while operating their own programs (Burstein 2011). Friends and umbrella organizations have expanded their fundraising activities and increased their discretion in decision-making over allocations. At the same time, new intermediary organizations have developed, such as advisory organizations that support the management of philanthropic funds.

This has resulted in a decentralized system that is reflected in the increasing number of grants and number and types of recipient organizations. According to Lindsay and Wuthnow (2010), the structure of Jewish philanthropy relies heavily on "regranting organizations." For example, between 1999 and 2003, UJA-Federation of New York received $184 million in contributions from various foundations. In addition, the most recent survey of Jewish nonprofits found 1,438 foundations that "provide financial support to other organizations," half of which were assigned a second category, plus 240 federations that also allocate resources to Jewish agencies (Burstein 2011, 140). The complexity of the structure of Jewish philanthropy makes it harder to track the flow of funds within and outside the community and challenges our ability to assess the overall scope of giving. This complexity is illustrated in Fig. 2.

This illustration depicts a hierarchical and intertwined system and an interdependence between the different types of funders, which presents several challenges to the analysis of Jewish grant making. For example, the high probability for double- and even triple-counting the same funds can result in the inflation of the scope and scale of Jewish grant making. Double-counting can occur while analyzing the contributions made to other grant-making organizations, such as federations, community foundations, Friends organizations, and umbrella organizations. These challenges also arise when exploring giving to and by major nonprofits in Israel. For example, grants to The Jewish Agency for Israel or the American Jewish Joint Distribution Committee are sometimes further allocated to nonprofits in Israel. Table 4

Table 4 Number of grants made to grant-making organizations

Type of organization	Community foundation	Federation	Friends organization	Pass-through organization	Umbrella organization	Total
Private foundation	275	481	553	67	114	1490
Corporate foundation	5	46	34	0	31	116
Donor advised fund	11	27	76	16	19	149
Supporting foundation	2	52	42	0	4	100
Community foundation	24	142	23	0	9	198
Federation	19	84	30	1	186	320
Pass-through/friend	0	0	14	0	0	14
Service provider	0	0	2	0	0	2
Advisory/philanthropic services	0	0	0	1	0	1
Total	336	832	774	85	363	2390

displays the number of grants made by funders to recipient organizations that are engaged in allocating funds.

The table illustrates the potential for double-counting. For example, private foundations made 481 grants to federations, which in turn do their own programming and funnel money to nonprofits. Federations, in turn, made 320 grants to other grant-making organizations. If the resources given by private foundations are subsequently distributed elsewhere by the recipient organizations, double-counting those dollars would overestimate the total amount in the Jewish philanthropic system. A common approach to avoid double-counting is to exclude large grant-making organizations (Hodgkinson and Toppe 1991). This exclusionary approach, however, omits financial data and under-reports the scope and change in contributions. Including large grant-making organizations entails a different challenge: tracking the flow of specific grants from the original grant-maker through the intermediary and final recipients. Excluding the few cases with specific data that describes donor intent, there is overwhelming ambiguity when it comes to what conduit organizations contribute and how these grants are related to donations they previously received. For example, the Friends of Yad Sarah made a $2,141,000 grant in 2007 but did not receive a grant of similar size (or even half the size) between 1999 and 2007. At the very least, this suggests that money is allocated to Israeli nonprofits as lump sums and therefore tracking flows of grant money from the original grant-maker to the intermediary organization and then to the final recipient is not readily doable. The current structure of the allocation system requires a unique methodology to avoid double-counting on the one hand and omitting data on the other hand.

The Study of (Jewish) Donor Advised Funds

Donor advised funds (DAFs) are charitable giving channels through which donors stream their funds into an account at sponsor organizations, such as community foundations or commercial investment firms. The number of US accounts grew from 180,000 to 270,000 between 2010 and 2015; contributions from DAFs accounted for 8.4% of individual giving in 2016; and the assets of all accounts were valued at over $80 billion in 2016 (Arnsberger 2016; Colinvaux 2017). The growth of DAFs in the philanthropic activities of ethno-religious communities is particularly evident in the new fundraising strategies developed by communal charities.

Religiously oriented DAFs are among the largest philanthropic organizations in the United States. Recent data from the 2017 National Philanthropic Trust (NPT) report indicates that the number of DAFs at Religious Identity Single Issue Charities account for the vast majority of all Single Issue Charities (84%), and their assets have increased since 2012. According to Lindsay and Wuthnow (2010), in the past decades there has been an increase in the philanthropic investment of religiously motivated donors in DAFs. They indicate that DAFs, such as the Community Foundation of Greater Memphis and Foundation for the Carolinas, are used by religious donors as new funding channels for their contributions. They provide the example of the National Christian Foundation, which had over $1.2 billion under management in 2007 and over $2 billion by 2016.

Researching DAFs in an ethno-religious context using existing methodological approaches is particularly challenging. Unlike the other forms of grant-making organizations described in this article, DAFs are the product of the relationship between the donors and the institutions that house them, and they follow their donors' instructions for payouts. Although DAFs are under-regulated and not obligated to follow a set timeline for payouts, their sponsors still provide charitable tax deductions to donors without a commitment to the spending requirements private foundations must follow.

The public perception that DAFs have low payout rates has been challenged by recent data published by NPT. NPT found that DAFs paid out 20.3% of their assets in 2016, and in the preceding five years their national payout rate remained above 20%. Furthermore, their overall level of grant making increased by almost 6% from 2010 to 2015 (National Philanthropic Trust 2017). This suggests that at least some DAFs spend more than other forms of grant-making organizations, especially as many private foundations do not meet their 5% spending requirement (Boris et al. 2008). The trends hold true for at least some DAFs housed in Jewish institutions: According to the 2017 annual report of the Jewish Communal Fund (JCF), DAF holders spent on average 25% of their assets the previous year. In addition, 10% of the JCF funds distributed 50% or more of their assets over an average of 15 grants per year (Jewish Communal Fund 2017). This data indicates that the process for studying Jewish DAFs, and DAFs in general, presents a methodological challenge of its own. Despite the high payout rates mentioned in the reports, as noted above, there is no legal incentive for spending among DAFs. This suggests researchers should view DAF sponsors as endowment-style institutions and evaluate them according to

two measurements: their philanthropic capital, in the form of cumulative assets, and their annual expenditures.

Our findings suggest the growing scope and scale of DAFs in the charitable activity of Jewish individuals and organizations. Among DAFs housed in Jewish organizations, giving totaled nearly $3.5 billion from 2000–2015, representing the third largest number of grants and fourth largest dollar amount of all the grant-making organizations (see Table 3). As we discuss below, however, the true market share of Jewish DAFs is likely greater. The preservation of donor anonymity is the guiding principle of DAFs, rendering the definition of Jewish grant making as offered in this article difficult to apply. As in most cases the identity of the donors cannot be ascertained by third parties, three categories of DAFs are the most appropriate for the study of DAFs in an ethno-religious community.

The first category includes DAF grants made from distinctly Jewish-sponsored institutions, such as the Jewish Communal Fund. Although only 67% of its annual expenditures (totaling $170 million) went to Jewish causes, the funds managed by JCF can be assumed to be donated by Jewish funders as only 2% of its donors are not Jewish (Jewish Communal Fund 2017). For the purpose of this research, all grant making by sponsor organizations associated with the Jewish community, regardless of the causes or recipient organizations, was included for analysis.

The second category includes DAFs sponsored by non-Jewish organizations, e.g., national charities, community foundations, and single-issue charities. Because of the non-sectarian nature of the sponsor organizations as well as the inability to identify the fund contributors, inclusion in the analysis was based on the recipient organizations—those that focus on Jewish or Israeli causes or are based in Israel—rather than on the funding organizations. The grants that were included were determined by searching for the recipient organization or the grant description on *Foundation Search*, as detailed in the methodology section.

The third category includes organizations that sponsor DAFs and also engage in other forms of charitable activity, where sponsoring the DAFs is a secondary enterprise. These funds are mostly housed in the larger Jewish federations and community foundations. For example, the grants made by Combined Jewish Philanthropies of Greater Boston (CJP) between 2007 and 2015 include over $974 million from DAFs housed at CJP. By comparison, $504 million of grants derived from other CJP resources. These and similar grants, however, were not coded as DAFs by default. Grants made from private funds through public charities could only be coded as such when the grant descriptions on the IRS Form 990 specifically indicated the monies came from a DAF.

Discussion

Scholars who explore the sociological, demographic, organizational, cultural, and economic aspects of the Jewish community increasingly observe the importance of Jewish philanthropy. Focusing on a better understanding of the trends and developments in individual, organizational, and communal giving, these studies generally lack comprehensive data on the national and international structures of

Jewish giving and the different forms and channels contributions take. The multiple methodological approaches used to study Jewish philanthropy yield a rich and diverse research corpus but, at the same time, challenge the ability to recreate research, compare findings, and provide a broad reference point across units of analysis. The creation of a comprehensive dataset of US Jewish grant making is long overdue. A dataset can provide the framework for understanding giving trends and lead to a comparative understanding of Jewish philanthropy with other ethno-religious communities.

The methodological challenges related to the study of community philanthropy, as exhibited in the case of the Jewish community, include difficulties in identifying grant-making organizations and establishing measures for their inclusion or exclusion. We argue that the inclusion of Jewish grant-making organizations should be based on the Jewish identification or background of the organizations' founders, not on whether the recipient organizations are Jewish, and that such Jewish identification does not require an active Jewish way of life or communal engagement. Jewish grant making is influenced by wider contextual trends and includes grants directed toward non-Jewish organizations in addition to Jewish ones. The criteria suggested here are consistent with ongoing demographic and sociological understandings of the Jewish community, namely that those with Jewish backgrounds who do not engage in explicitly Jewish behaviors still count as Jews. By including multiple forms of organizations, this methodological framework enables the analysis of both the funding and recipient organizations and thereby broadens our understanding of the Jewish philanthropic sector and the organizations operating within it. This inclusive approach is appropriate for other ethno-religious groups experiencing diversification of members' self-identification and having a philanthropic structure that entails giving both inside and outside the community.

Another challenge to the study of organized Jewish philanthropy is analyzing the grant activity from the original funder to the ultimate recipient. Many organizations central to Jewish communities, especially federations, both collect grants from and allocate grants to many individual donors and organizations. Tracking and classifying these grants requires a set of simplifying assumptions. The prominent one is the recognition that the structure, paths, and flow of philanthropic funds within an ethno-religious community are connected to the locality of its philanthropy and the distinctive characteristics of that community. This is particularly evident in the case of religious philanthropy and its extensive use of regranting organizations (Lindsay and Wuthnow 2010). As we found in the case of US Jewry, its philanthropic system is connected to the historical circumstances in which this community developed and the changes in other international Jewish communities. Understanding the attributes of Jewish philanthropy allows us both to differentiate between types of grant-making institutions and unique organizational forms and to properly track the flow of funds to avoid both double-counting and omission of financial data. This is applicable to the study of other ethnic and religious communities, such as the Armenian-American community, which formed unique paths for the flow of contributions supported by local and international organizations. Therefore, understanding Jewish philanthropy as community

philanthropy allows us to assess the ways in which an ethno-religious philanthropic structure develops and grows as well as the reasons for its structure.

A community philanthropy approach to the study of Jewish philanthropy also permits integration of broader developments in national, fiscal, and legal institutions (Berman 2017). Specifically, the use of DAFs as a central giving channel across communities and regions influences the research outlined in this article. Donor anonymity necessitates a different approach to capturing the growing scope of these funds. The focus on Jewish sponsors of DAFs offers one solution, while the focus on Jewish recipient organizations and the grant targets offers another. By incorporating DAFs in the study of Jewish philanthropy, we shine a spotlight on a growing form of private charity within ethno-religious communal structures (Lindsay and Wuthnow 2010). Our methodological approach emphasizes the importance of DAFs, which are on the rise not only within the Jewish community's philanthropic sector but also among the philanthropic systems of other ethnic and religious communities. DAFs can be studied according to the mixed approach offered in this article, enabling the identification of the scope of giving by different members of a community. We argue that including DAFs where possible is more beneficial to the study of community philanthropy than excluding them altogether. We also suggest that a future study should delve comparatively into both their expenditures and cumulative assets.

There are several limitations to the research presented in this article. First, as discussed above, are the methodological challenges, such as inadvertently including some non-Jewish funders in the study and excluding some Jewish funders. Second, the findings presented in this article are based on an analysis of grants of $500,000 and over and do not reflect results from analyzing smaller grants. A study of small grants is one of our long-term research goals. Challenges common to big-data research, such as data error, also exist. Both missing and incorrect data may have entered the database through the process of digitizing 990 forms by the Internal Revenue Service and philanthropic database software. Processed data is also not inherently comprehensive and does not include more organic forms of giving, political contributions, non-deductible contributions, and giving between individuals (Soskis 2017). These other forms of giving represent central aspects of ethnic and religious philanthropy and as such they merit a separate methodological approach. Third, the research population was created, in part, by searching for DJNs and researching them further to determine whether they meet the criteria for inclusion as Jewish organizations. A DJN search is limited by the fact that there are non-Jews with DJNs, and Jews without DJNs. This emphasizes the importance of utilizing other search methods that are not based on DJNs.

Nevertheless, this article offers for the first time a consideration of several methodological challenges in studying grant making by Jewish organizations. The lessons learned from the study of Jewish philanthropy are not limited to this one community. Other ethnic, racial, and religious groups have developed their own models for fundraising and grant making that are based on the historical and social conditions of their development. These communities are influenced by broader trends in the US philanthropic sector. Therefore, the study of Jewish philanthropy can serve as a model for studying other communities by offering various benchmarks and

analytical frameworks. Similarities between structural and communal systems indicate that many of the methodological challenges highlighted in this article apply to the study of other communities in the United States. Future research can highlight these points of overlap and differences, and it can provide a better understanding of the unique challenges and dilemmas inherent in the study of ethno-religious philanthropy within the broader context of US philanthropy.

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