



Board Learning Session: Deliberate Strategy Portfolio Overview

March 2025

- Excited to provide this update
- Preparing this presentation was a great opportunity to bring together various ways we are talking about our work
- Feels like the right moment for a comprehensive update
- It will be the first one since the board retreat in Aspen, which was a year and a half ago

Agenda for This Session

1. Overview of Deliberate Strategy
2. Update on Our Deliberate Grant Categories
 - General Implementation Updates
 - Important Changes Since October 7
3. Areas Where the Foundation is Leading

- Agenda for today is to review the deliberate strategy
- Closer look into the grant categories
- This will include general updates on implementation
- ...and a focus on key changes since October 7
- End with areas where our team is dedicating extra time and attention to lead

Strategy Review: Our Mission Statement

To foster compelling,
effective Jewish
learning experiences
for young Jews.



- Beginning with the strategy
- This mission dates back 20 years!
- Crafted by the founding board of directors to guide our work
- We didn't update it back in 2019 when we revised our theory of change
- But we did spend time thinking about what this means to us today

Strategy Review: Our Mission Statement

To foster compelling,
effective Jewish
learning experiences
for young Jews.



- Compelling and effective – have long-term influence on the ways learners think, feel, act; allows people to engage and wrestle

Strategy Review: Our Mission Statement

To foster compelling,
effective Jewish
learning experiences
for young Jews.



- Learning experiences - can happen in a range of settings (Jewish and secular), including online, cohorts, one-on-one, etc.

Strategy Review: Our Mission Statement

To foster compelling,
effective Jewish
learning experiences
for **young Jews**.



- Young Jews – Those who are attracted to traditional and alternative, and those who are not; also their families, and their friends who might not necessarily be Jewish.

Strategy Review: Our Aspiration

Inspired by Jewish learning experiences, all Jews, their families and their friends lead connected, meaningful, purpose-filled lives, and make positive contributions to their communities and the world.



- This thinking about the mission brought us to crafting this aspiration statement
- We added in the language about connection, meaning and purpose
- It's not enough to just become Jewishly literate, learning has to help a person thrive

Strategy Review: Our Aspiration

Inspired by Jewish learning experiences, all Jews, their families and their friends lead **connected, meaningful, purpose-filled lives**, and make positive contributions to their communities and the world.



- Our assumption is that people who feel a sense of connection, meaning and purpose

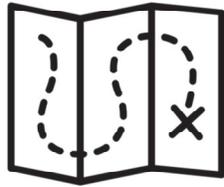
Strategy Review: Our Aspiration

Inspired by Jewish learning experiences, all Jews, their families and their friends lead connected, meaningful, purpose-filled lives, and make positive contributions to their communities and the world.



-will in turn contribute to a better world
- Our grantees really appreciate this language, and many have adopted similar kinds of statements around why they do the work they do

Strategy Review: Deliberate and Emergent



Deliberate Strategy

Provide strategic grants and support to outstanding Jewish nonprofit organizations and initiatives with proven models for Jewish learning and talent development.



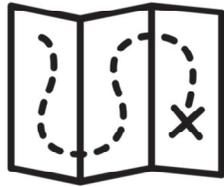
Emergent Strategy

Invest in unconventional talent, ideas, and opportunity landscapes to generate new value propositions for Jewish life.

- As of 2019, the Jim Joseph Foundation has two distinct strategies to achieve this aspiration, led by two teams –
- One headquartered in SF and one in New Orleans
- This slide features our current language (from our website) about these two strategies
- Provide strategic grants and support to outstanding Jewish nonprofit organizations and initiatives with proven models for Jewish learning and talent development.
- Compare that to our emergent strategy - Invest in unconventional talent, ideas, and opportunity landscapes to generate new value propositions

for Jewish life.

Strategy Review: Deliberate and Emergent



Deliberate Strategy

- Proven program models
- Mainstream and alternative institutions
- Reaching the 30%



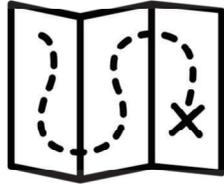
Emergent Strategy

- Creative new approaches
- Outside of institutions
- Reaching the 70%

- Key differences here are...
 - deliberate works with proven models – what we already know works—camp, day school, immersive Israel travel, etc.
 - emergent is experimenting with creative new approaches that haven't been tried before, to discover new ways of delivering Jewish learning experiences
 - deliberate works with existing traditional and alternative Jewish institutions (like Hadar the traditional egal yeshiva and Svava the radical queer yeshiva)
 - emergent is not about existing institutions, they are bringing together new teams that don't already exist, working with new talent whom they have identified through their new networks
 - deliberate is reaching the kinds of people who are attracted to mainstream and alternative Jewish programming—when done well these kinds of experiences will appeal to upwards of 30% of Jews
 - emergent is intentionally targeting the other approximately 70% who wouldn't want to go to a *traditional* or even a *radical* yeshiva, who probably don't even consider going to a yeshiva, or any kind of organized Jewish thing – we need something entirely different to appeal to this audience
 - the deliberate approach uses the metaphor of a roadmap – a great tool for operating in a fairly well-lit, known universe
 - the emergent approach uses the metaphor of a compass – a great tool

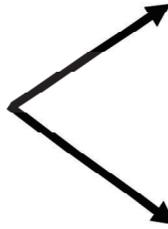
for venturing out into an unknown universe

Strategy Review: Deliberate Focus Areas



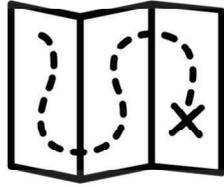
Deliberate Strategy

- Proven program models
- Mainstream and alternative institutions
- Reaching the 30%



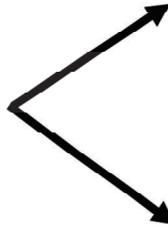
- We're now going to go one layer deeper into the deliberate side of our work and then pause for questions
- Hopefully folks will recall we have two focus areas for our deliberate grantmaking:
 - Programming that focuses on Jewish learning for young people directly
 - Programming that invests in leaders and educators that support and deliver that Jewish learning
- Today, we have two sub-teams in SF working together closely on each of these areas

Strategy Review: Deliberate Focus Areas



Deliberate Strategy

- Proven program models
- Mainstream and alternative institutions
- Reaching the 30%



Strategy Review: Deliberate Focus Areas



Strengthen and grow
powerful Jewish
learning experiences



Support the recruitment and
development of exceptional
leaders and educators

- There are many organizations delivering Jewish learning experiences.
- Over the years, as we have become increasingly strategic, we have learned to focus on those that have the largest reach, and are delivering the most compelling program models, and operating with excellence
- There is an ocean of opportunity in this space, so we have the luxury of being quite selective in whom we choose to work with
- In our work with leaders and educators—we have seen over the past two decades how the people behind this work are *the* primary driver
- And when you recruit and support a leader or

educator, you are making a long-term investment in them and all the people who will work for them and learn from them now and into the future

- By investing in leaders and educators, we strengthen all the work we do with young people
- And the pipeline of leaders and educators is coming from those programs

Grant Categories: Signature



Signature

- The purpose of this next set of slides is to talk through the categories we've defined within the deliberate grantmaking
- And to provide updates on our progress in implementing those categories
- And talk through how things have changed since October 7
- As always, we'll begin by talking about our Signature grantees
- Over time we have come to appreciate that while there are many Jewish nonprofits in the Jewish education business, there is a small subset who are having an outsized impact

Grant Categories: Signature

Anchor partners, exceptional performers, strong leaders,
impressive reach, proven outcomes, multiple co-funders

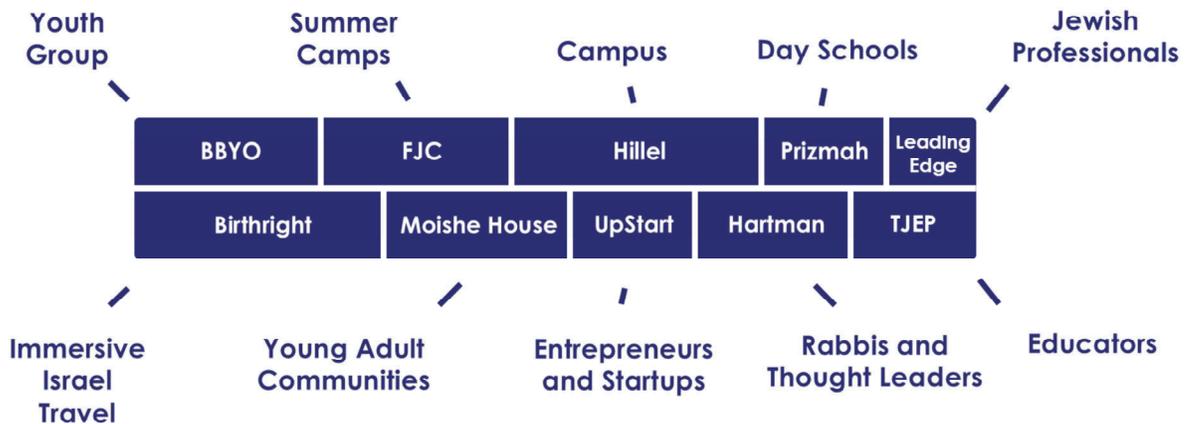
Six years ago, we decided to focus special attention on these organization by creating this Signature grants category—these are our anchor partners, they perform exceptionally well, have impressive reach (usually in the tens of thousands), deliver results and are able to attract other funders to their work

Grant Categories: Signature

BBYO	FJC	Hillel	Prizmah	Leading Edge
Birthright	Moishe House	UpStart	Hartman	TJEP

- This portfolio consists of ten organizations who get our largest multi-year, unrestricted grants, ranging from \$1.5M to \$4M depending on their size and level of impact

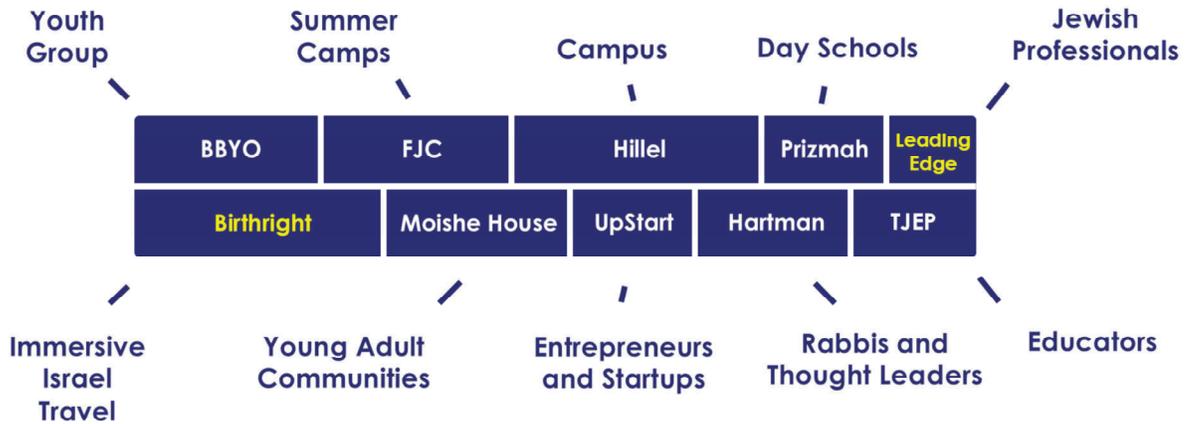
Grant Categories: Signature



- They cover most of the primary areas of Jewish education – youth group, camp, campus, day schools, immersive travel, young adult communities, startups
- And do systemic work with talent from across the Jewish education sector– rabbis, thought leaders, educators, and Jewish professionals of all kinds
- These grantees account for nearly half of our deliberate grantmaking dollars and over 80% of the people we reach through the portfolio
- Simply put, this is where we get our greatest return on investment, time and time again
- Work with this portfolio is going exceptionally well.
- Nearly all these organizations have grown their budgets and increased their reach
- Since October 7, these are the grantees who quickly responded with emergency funding requests, raised money (sometimes millions) and put it to work strategically. This happened during COVID as well.
- You heard last year about Hillel’s response, Birthright’s response to the war, but literally every one of these organizations has implemented plans to respond to antisemitism, increased demand for Israel ed, wellness support for professionals and young people, creating spaces

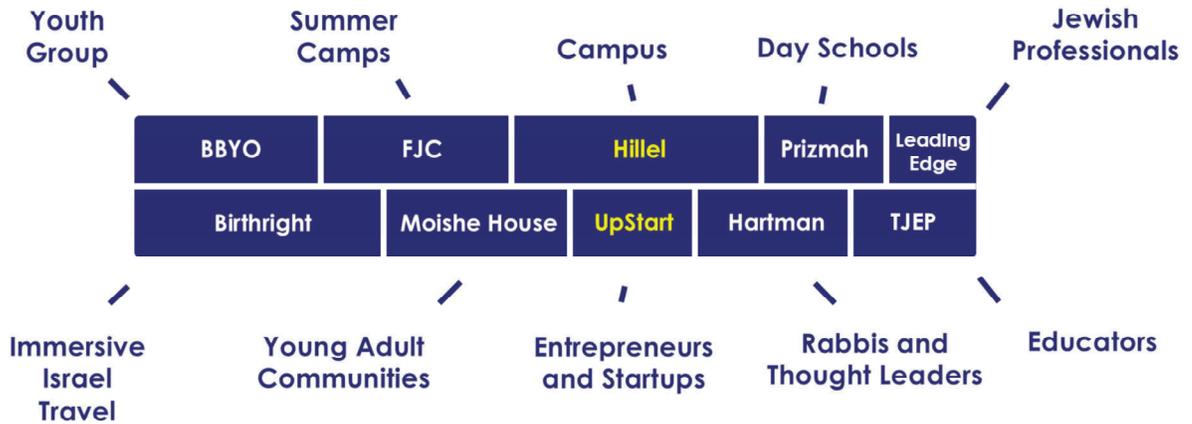
- for young people to gather and learn.
- Looking ahead, we plan to hold strong with this category, although not increasing the allocation. And a couple of cases (like UpStart) we are looking to dial back a bit.

Grant Categories: Signature



- We are constantly learning from these organizations
- And we invite their CEOs to come speak to the board—including Elias Saratovsky and Gali Cooks later today. Their renewals are coming in June.

Grant Categories: Signature



- Two signature grants are up for renewal at this meeting—Hillel and UpStart
- We'll move this block to the bottom left to serve as the foundation of our portfolio.
- Questions about signature grants?

Grant Categories: Signature

Signature

Grant Categories: Build



Build

Signature

- Next up is the Build grant category
- Signature grantees are great, but they aren't reaching everyone
- We designed the Build grant category to broaden our audience beyond the Signature grantees

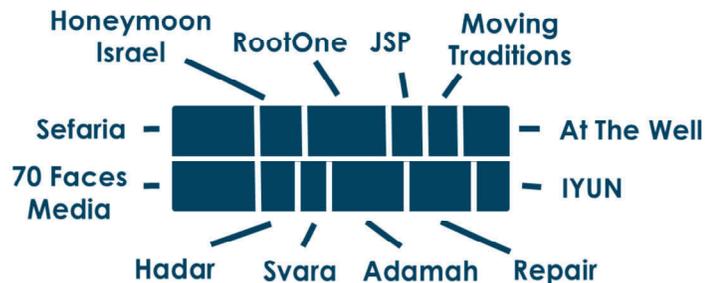
Grant Categories: Build

Smaller, but poised
for growth

Signature

- Special focus here is on organizations that are already operating at scale, on a growth path, and ready for an infusion of funding to help fuel dramatic growth
- Board members will recall that we first designed this program to be three-years and out
- But after evaluating the work, we adjusted to a seven-year arc of funding over the course of 2-3 grants
- We also have been working diligently over the past 18 months to develop a more expansive and sophisticated system for providing hands-on support to help ensure their success which we'll be rolling out in 2025

Grant Categories: Build



Signature

- There are currently 12 grants in this portfolio, offering a range of learning opportunities like immersive Israel travel, online learning, intensive text study, environmental and service learning, cohort-based learning in various settings.
- These grants range from \$250K to \$1M per year
- Like any high-risk investment portfolio, some of these organizations are doing exceptionally well, exceeding fundraising and growth targets. Others less so.
- We are learning from all of it
- So much comes down to leadership and the kinds of support they have access to
- Over the past 18 months, the high performers have really stepped up to meet the moment in outstanding ways – Adamah and Hadar are examples of offering great new programming

(wellness retreats, Shai's book)

- Immersive Israel travel programs have struggled although pivoted nicely (ie Honeymoon doing weekends, sending groups to Argentina)
- What's next for this portfolio is supporting most of these grantees through the exit phase with the goal of them being sustainable
- We have a few new potential Build grantees on the radar but aren't moving forward just yet as we focus on refining our capacity building offerings.

Grant Categories: Build

Build

Signature



Grant Categories: Talent Development



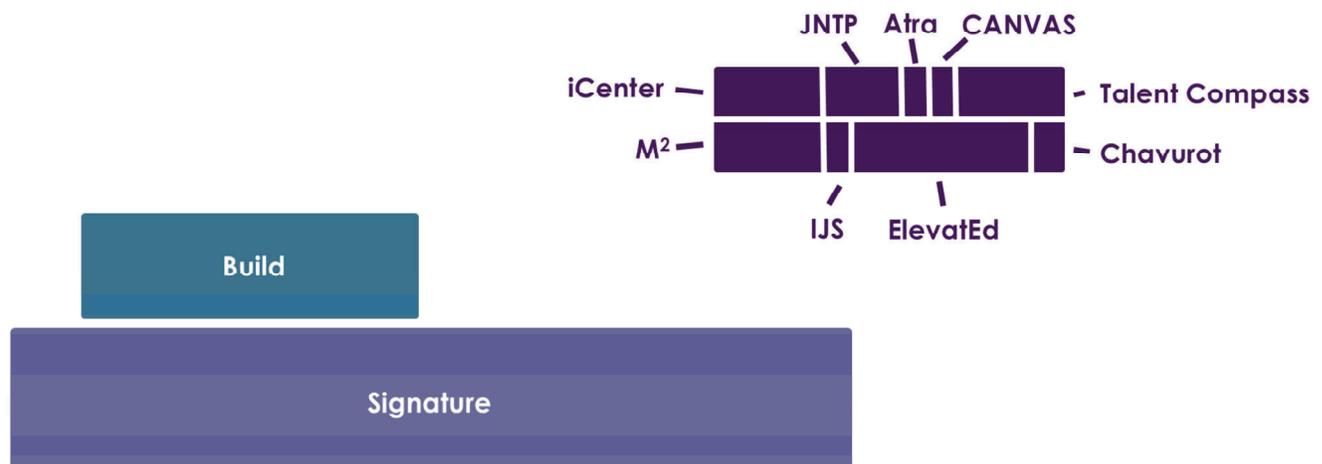
The complement to the Build Grants on the EJLE side of the portfolio is the category we call Talent Development

Grant Categories: Talent Development



- These are the organizations who have a major focus on professional development for Jewish leaders and/or educators
- There are quite a number of programs that provide episodic or small-scale PD. Our focus is on the ones that have figured out how to offer more intensive PD and do it at scale.

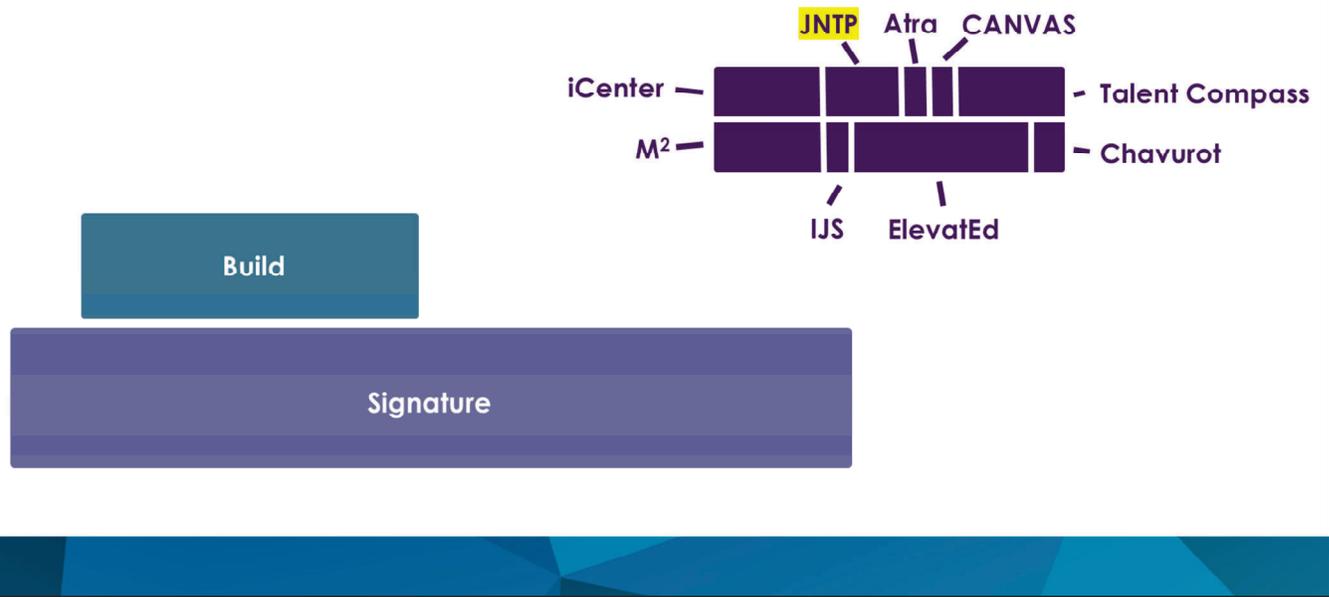
Grant Categories: Talent Development



- We currently have nine grants in the portfolio, working with Israel educators, experiential educators, day school and pre-school teachers and administrators, rabbis, arts education leaders, mindfulness teachers,
- The two on the right are designed to provide extra PD for the people who work for the other organizations we fund.
- These grants also range from \$250K to \$1M per year (with ElevatEd as an outlier in 2024)
- What's new in this portfolio is the emphasis on quality *and* quantity.
- What is unique about these nine organizations is their ability to deliver this.

- Funding partnership is an ongoing challenge in this space (PD is wonky to fund), but most of them are doing pretty well.
- Every single one of these organizations made a strategy shift of some kind following October 7.
- Most of it was teaching people how to teach / talk about Israel-Palestine and current events OR teaching people how to take care of themselves during a very stressful time. Or both.
- What's next for this portfolio? More focus on the talent pipeline—more investment in identifying and recruiting early career professionals and new-to-the-sector professionals.

Grant Categories: Talent Development

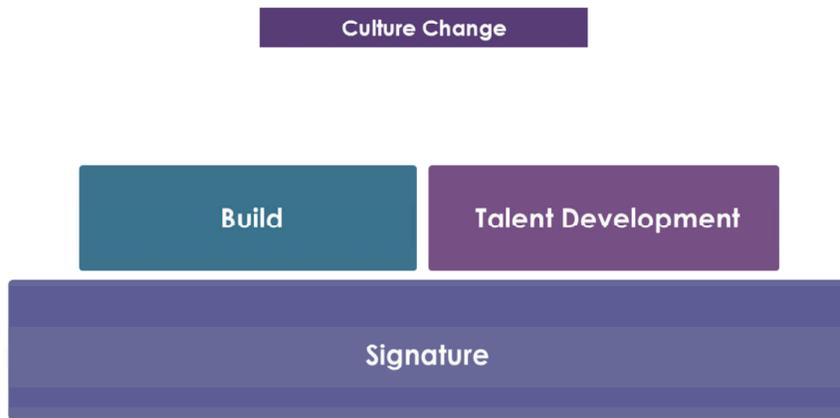


Grant Categories: Talent Development



We have one Talent Development renewal on the docket tomorrow – JNTP.

Grant Categories: Culture Change



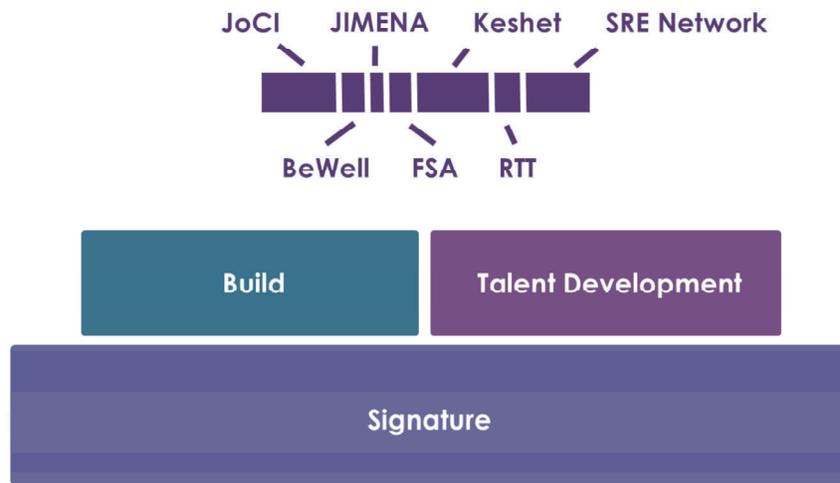
Next up is a relatively small investment area that supports a select group of organizations working on what we call “culture change”

Grant Categories: Culture Change



- Our goal is to influence on the entire field of Jewish education to make it a better experience to participate and work for our organizations.
- These grantees use a range of tools that are mentioned in the Board memo about it—thought leadership, research, training, conferences, resources, regranting—to drive these shifts.

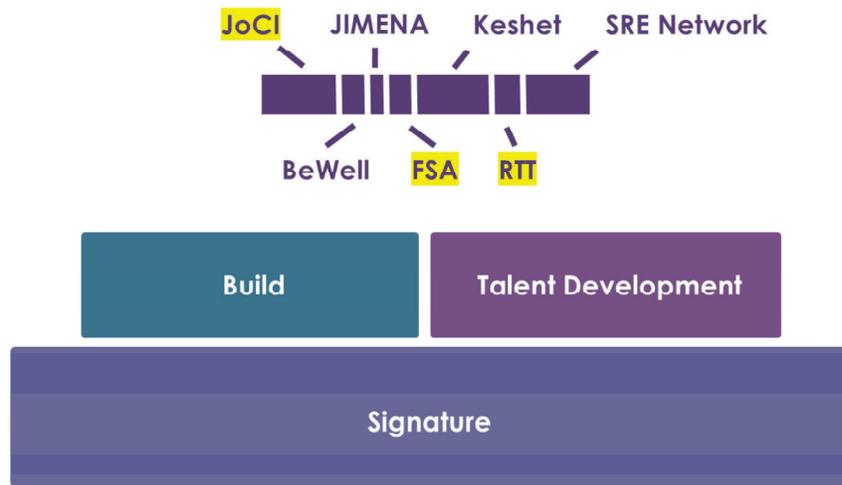
Grant Categories: Culture Change



- We currently have seven grantees in this category working on culture issues related to race, ethnicity, gender, sexual orientation, wellness, and viewpoint diversity.
- These grants range from \$150K to \$650K per year
- The past 18 months have been a roller coaster for these grantees.
- For about 14 months several of these orgs got caught up in the backlash against DEI and the refocus towards antisemitism.
- But that has started to shift when recent executive orders from the federal government created renewed interest in their work.

- And the organizations on the bottom row have experienced unprecedented demand for their work around wellness and viewpoint diversity. All of the, stepped up after Oct 7 with increased programming and new resources.
- As mentioned in the board materials, we are currently in the midst of reviewing this grant category to get clearer about what success will look like for this category and how we might refine the allocation to accomplish our goals.
- We look forward to having recommendations later in the year.

Grant Categories: Culture Change



As a reminder, three of these grants are up for renewals—all of them are for two(ish) year grants.

Grant Categories: Culture Change

Culture Change

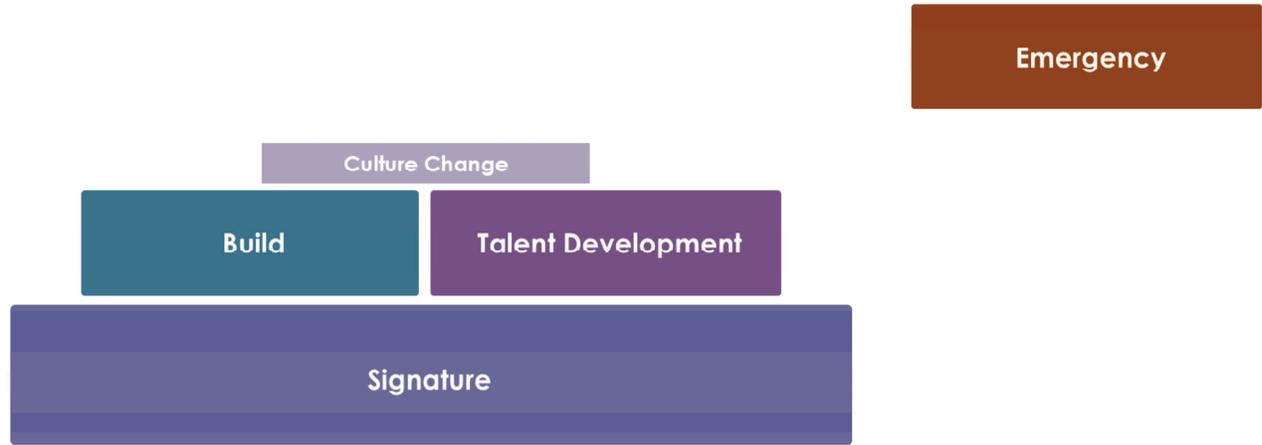
Build

Talent Development

Signature

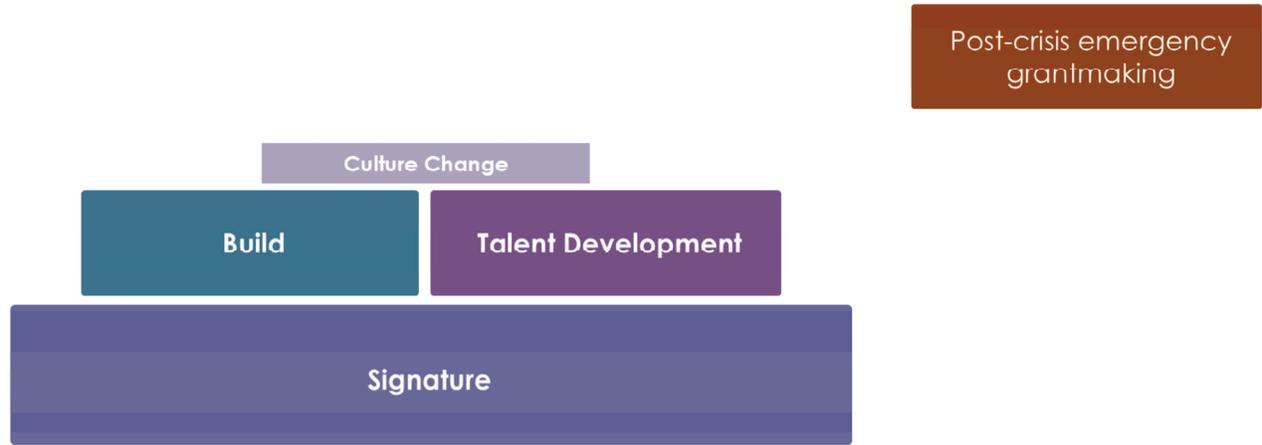


Grant Categories: Emergency



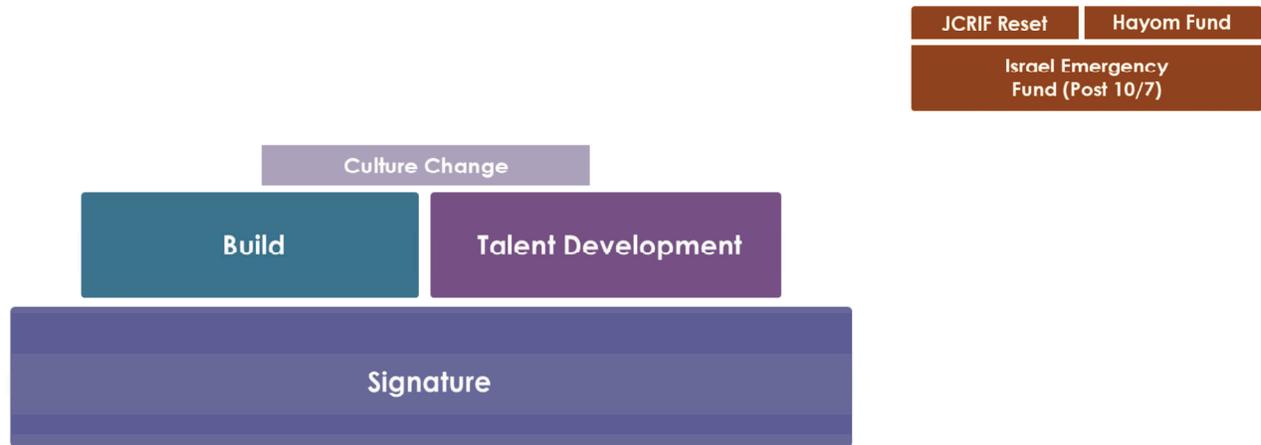
- Multiple times over the past five years the board has set aside dollars for emergency grantmaking—in response to COVID and in response to October 7.

Grant Categories: Emergency



- In each case there was some funding for initial grantmaking we did independently followed by collaborative grantmaking with other funders.
- In the before-times, our emergency grantmaking was a relatively small allocation, but it currently amounts to a substantive portion of our grantmaking, particularly this year.

Grant Categories: Emergency

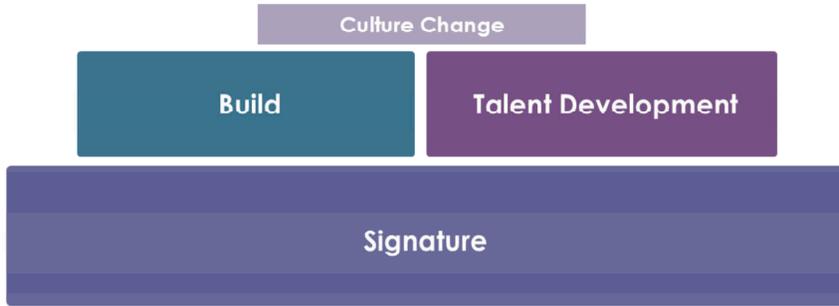


- In 2024, this included the tail end of our JCRIF Reset grants (post-COVID, ending this year), the Israel Emergency grants we made on our own, and the portion of those funds we dedicated to our Hayom collaboration last summer.
- As Directors heard about at every board presentation last year, these funds have supported critical new work such as travel programs to Israel for leaders, educators and volunteers, new curriculum development and training, wellness initiatives, “surge” response and much more.
- Ideally, the need for this latest round of emergency grantmaking will subside and we can

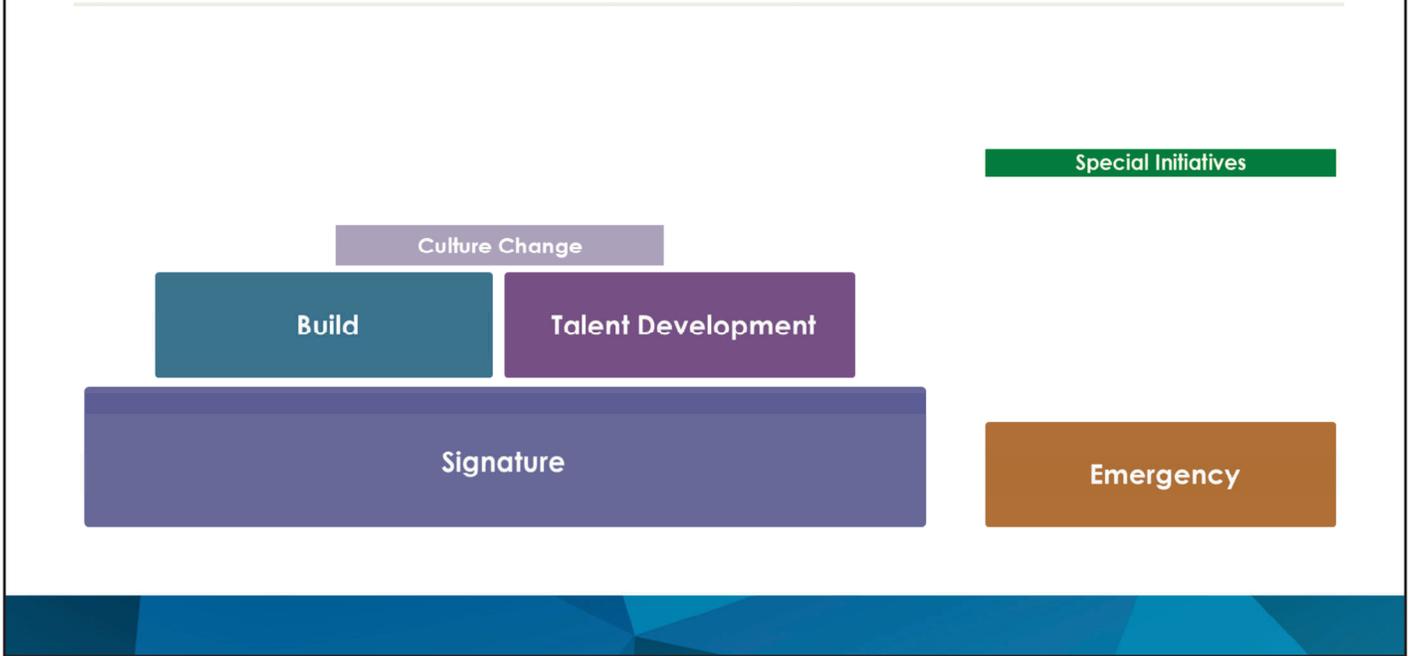
reallocate these funds to more proactive (vs reactive) grantmaking efforts.

Grant Categories: Emergency

Emergency



Grant Categories: Special Initiatives



At our Board Retreat in Aspen in July of 2023, we agreed that having defined grant categories was helpful, but we didn't want to box ourselves and miss opportunities.

Grant Categories: Special Initiatives



- So, we agreed that up to 10% of the portfolio would be set aside for projects that we saw as promising even if they didn't fit into any of these categories.
- We have had a number of ideas in development, but following October 7 our attention and funding for this set-aside has largely been redirected towards emergency grantmaking.

Grant Categories: Special Initiatives

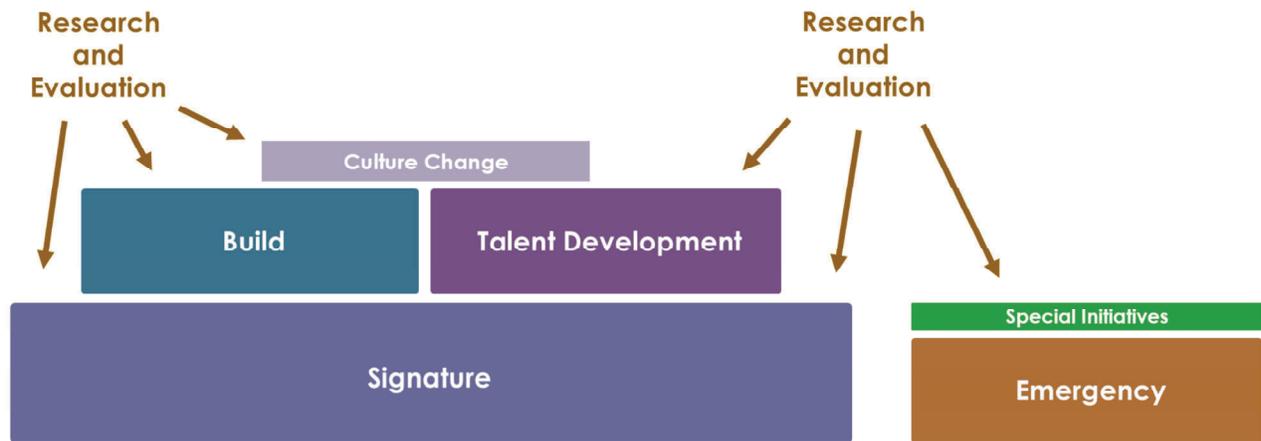


- The one major Special Initiative right now in the Hartman Rabbinic Program which, as we have shared, is going very well with an outstanding set of candidates applying for cohort 2.
- We are hopeful that over the coming years those green and orange boxes could become one big box that is all green.

Grant Categories: Special Initiatives

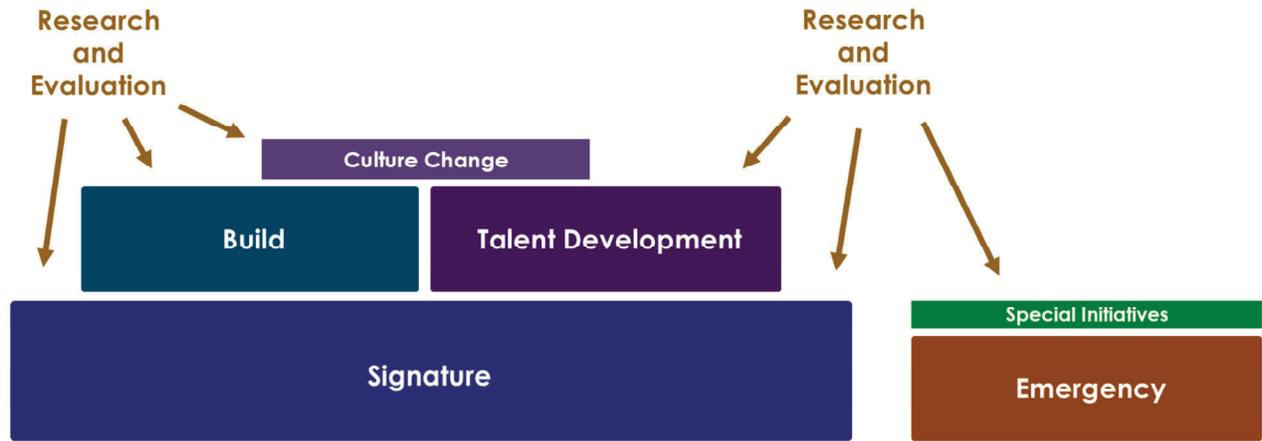


Grant Categories: Research



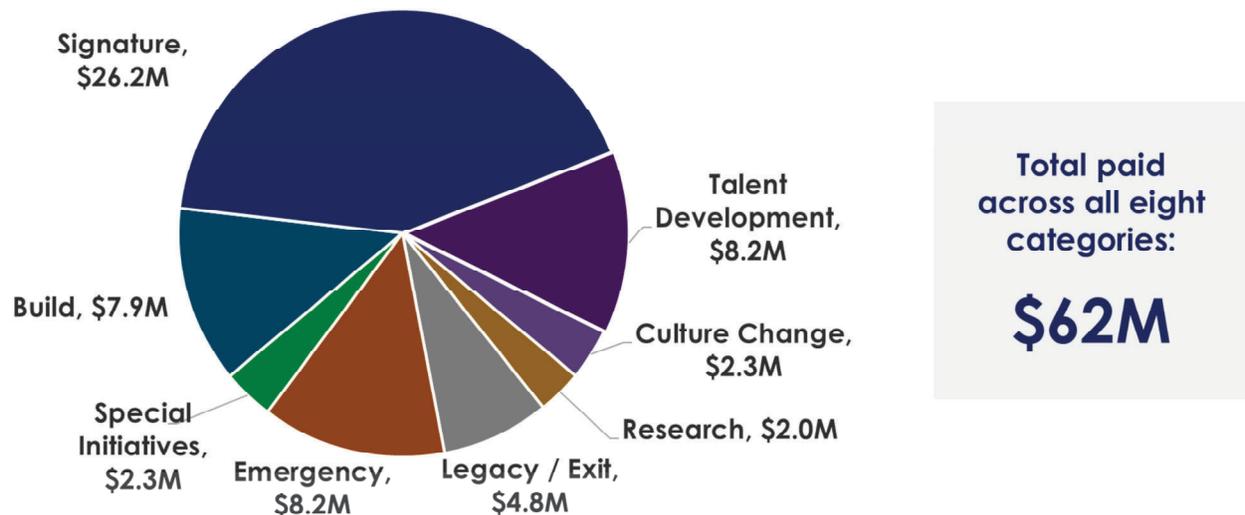
- One last category to mention is our allocation of funds to research and evaluation
- Folks saw the memo in the board materials that summarized the full breadth of our work in this space
- As we've discussed, our research and evaluation work informs all of our strategic decision-making.
- The extra round of studies we did last year helped ensure we had up-to-date knowledge of field needs following October 7.

Grant Categories: The Completed Picture



- This completed visual sums up the full story of our deliberate strategy
- With the long-term strategic framework on the left and opportunistic / reactive grantmaking on the right
- These boxes are drawn to scale in terms of dollar size, but here's another look...

Payments Made in 2024 by Deliberate Grant Category



- This pie chart shows the allocation of grant dollars to each of the categories
- As you can see—Signature is the lion’s share about two fifths. Build and Talent Development are about a eighth each.
- Note the additional pie slice for Legacy / Exit—there are still a few grants (like community-based teen initiatives, JDC Entwine) that tie back to older strategies but were at the tail end of their exit grants in 2024.
- Good news—emergency and legacy are scheduled to shrink in the coming year, possibly leaving room for more new opportunities.

What Is (and Isn't) New Since October 7, 2023

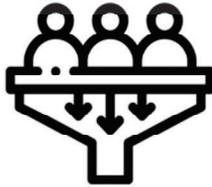
- Continued need for **joyful Jewish engagement and learning**
- More **Israel education**, better integrated with Jewish education
- More and different kinds of **immersive Israel travel** experiences (+ back-up plans)
- Increased training on **viewpoint diversity**
- Safer spaces for **conversations across difference**
- Deepened focus on **wellness and resiliency** for participants and professionals
- Enhanced **safety and security** at in-person programs

- Before moving on, we wanted to take a moment to summarize what was shared throughout about how our current grantees have made changes since October 7.
- Much of this is already happening, with more to come over the coming year, in part as a result of investments we made in 2024:
 - Joyful Jewish engagement and learning – has been an continues to be a need
 - More Israel education, better integrated with Jewish education has already begun and comprehensive work is underway to deepen and expand this
 - More and different kinds of immersive Israel travel experiences have already emerged with major overhauls to all of the trip itineraries; and some organizations are exploring alternatives (like Honeymoon Argentina)
 - Increased training on viewpoint diversity and safer spaces for conversations across difference continue to be in high demand, as noted in the GPSs from RTT and FSA
 - Deepened focus on wellness and resiliency for participants and professionals is happening in a wide range of settings from camps to schools to campus; although it is constrained by a shortage of social workers
 - Enhanced safety and security at in-person programs is, unfortunately, a new added cost of running in-person programs

Major Areas Where We Are Leading



Reimagining Jewish
and Israel Education



Talent Pipeline
(Including Rabbis)



Capacity Building
(Including Tech)



Research and
Learning

- We promised to end by talking about areas where the Grantmaking Team is allocating extra time and attention this year
- These are places where the Jim Joseph Foundation is either co-leading or working solo to drive an agenda and bring other funders along.
- The first is a co-leadership project with Schusterman where we are partnering with The Jewish Education Project to lead a comprehensive effort to reimagine Jewish education with Israel learning embedded throughout. This includes rethinking what is taught and also how we train people to teach it. It is a major undertaking involving stakeholders

from across the country and throughout our grant portfolio.

- The second is the talent pipeline work which we discussed in December—we're including the work around rabbis as part of this broader agenda. Much of this work is happening in partnership with the new Talent Pipelines Collaborative that we've been helping to build with Leading Edge. There is a three-hour pre-conference at the Jewish Funders Network conference dedicated to this topic.
- The third area is developing better resources for nonprofit capacity building—this is the hands-on support we provide directly or make available to our grantees so they can become more effective nonprofits. An important component of this is the targeted work that our newest teammate, David Goodman, will be leading around technology capacity building for our grantee partners and the entire sector.
- Lastly, we continue to play a major leadership role in the field of Jewish philanthropy around research and learning. Stacie Cherner is the only full-time professional working inside a Jewish foundation who is exclusively focused on this topic. She continues to serve as a resource to our grantees and other funders on how to conduct and utilize research and evaluation to inform

strategic decision-making.

Discussion with the Board

1. What questions do you have from this presentation?
2. What else can we share about at future meetings to build your knowledge base?



- Looking back across everything we talked about, what questions do you still have?
- What else are you looking to learn from future presentations?