

ZEDAKAH IN ACTION

*A Teacher's Guide to Creating and Managing
Jewish Youth Foundations*

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ACKNOWLEDGMENTS

*This manual is dedicated
to my students at
Temple Isaiah in Lafayette, California.
— Aaron Dorfman*

*With tzedakah, money becomes magic.
It goes through metamorphoses,
becoming now food packages for Passover,
now a hat that brings dignity to one
who needs just that — a new hat.
It buys gasoline to transport the old
when they have become too old to drive.
It buys sewing machines for
retraining mental patients.
It buys spoons for those who must be spoonfed. . .
and pays salaries for spoonfeeders
to do the work.
— Danny Siegel*

This project would not have been possible without the creativity and counsel of Michael Kesselman and the students at Brandeis Hillel Day School in San Francisco.

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Table of Contents

INTRODUCTION

What is *Tzedakah in Action*? What are its goals? A history of how we started, the story of the Temple Isaiah Seventh Grade Fund. And a note on naming. p.4

CHAPTERS

I. SETTING UP THE FOUNDATION

A suggested timeline. Working with the larger community. Creating a *Tikkun Olam* culture in a larger context including holidays, social action groups, and collectives. Looking at some financial aspects. p.8

2. FUNDRAISING

A thorough exploration of the many possibilities including auctions, community events, donations, grants and foundation support. We even look at alternatives for *Bar/Bat Mitzvah* gifts. p.20

3. TRANSFORMING STUDENTS INTO TRUSTEES

We look at teaching *tzedakah* in the context of Jewish text and tradition. We examine the concept of philanthropy, and learn how to brainstorm and make decisions. We look at the larger picture of *Tzedakah in Action*. p.26

4. MANAGING A GRANT CYCLE

The role of teacher and facilitator. How to effectively manage a board meeting. How to choose an issue. Learning to design a Request For Proposals (RFP) and Grant

Application. How to find and work with organizations. Learning to identify and shepherd potential applicants. Helpful ways to make the decisions, distribute grants, and to achieve closure with follow-up evaluations. p.60

5. CONCLUSION AND NEXT STEPS p.68

APPENDIX A: *Tzedakah and Philanthropy*

Tzedakah and the Jewish tradition of giving, its origins in Torah. *Tzedakah* principles and applications to *Tzedakah in Action*. *Tzedakah* as obligation. Giving with honor and dignity Rambam's ladder of *tzedakah*. Preventive *tzedakah*. *Tzedakah* for the giver as well as the recipient. Responsibilities of *Tzedakah* Fund Administrators. And a brief history of philanthropy in America. p.69

APPENDIX B: *Additional Resources* p.79

APPENDIX C: *Outline of a Youth Group Tzedakah Progressive Dinner Program* p.80

APPENDIX D: *Sample Forms* p.83

GETTING IN THE LAST WORD p.93

BIBLIOGRAPHY p.95

Introduction



WHAT IS TZEDAKAH IN ACTION?

TZEDAKAH IN ACTION is two things. First, *Tzedakah in Action* is the title of the teacher's manual you're reading right now. The manual is designed to help you implement a particular educational *tzedakah* program for synagogue and day school students in grades 7-12.

Most of the time, however, *Tzedakah in Action* refers to the *tzedakah* program itself. The program is based on a Jewish youth foundation called the Seventh Grade Fund, founded at Temple Isaiah in Lafayette, California, in 1998.

The Seventh Grade Fund works like this: Each year, all seventh graders at Temple Isaiah agree not to purchase gifts for their classmates when they become *B'nai Mitzvah*. Instead, each family donates \$200 to the Seventh Grade Fund. During their seventh grade year, in addition to their regular studies, these students serve as the Board of Trustees of the Seventh Grade Fund, their own private Jewish foundation. First, they learn about *tzedakah* and philanthropy. Next, they choose an issue to focus on for the year, like homelessness or human rights.

Then they send out Requests For Proposals to dozens of non-profit organizations that work on that issue. Finally, based

on returned applications and presentations, they decide which organizations will receive grants. Between 1998 and 2002, the Seventh Grade Fund gave away nearly \$75,000 to eighteen different non-profit organizations.

In 2001, the Walter & Elise Haas Fund awarded Temple Isaiah a grant to publish a teacher's manual that would allow other synagogues and day schools to replicate the Seventh Grade Fund. *Tzedakah in Action* is the result of that project. This manual will walk you through the process of establishing and managing a Jewish youth foundation. There are chapters on setting up the foundation, fundraising, teaching students about *tzedakah* and philanthropy, and managing a grant cycle.

In Appendix D, you'll find a Frequently Asked Questions sheet from Temple Isaiah's Seventh Grade Fund as well as a chart titled "How *Tzedakah in Action* Works." These are a couple of alternate ways of outlining and explaining the program.

WHY YOU SHOULD ESTABLISH A JEWISH YOUTH FOUNDATION

HAVING LED A number of classes through this process, I can attest to its impact. I've seen seventh graders spend hours carefully studying grant proposals. I've seen the Executive Directors of major non-profit organizations make Powerpoint™ presentations to a room full of twelve- and thirteen-year-olds. And I've had wonderful conversations with alumni of the project about how *tzedakah* matters in their lives.

Tzedakah in Action operates on the assumption that Judaism should inform the way we live in the world, not just what we study and how we pray. Ultimately, it can open a door for students not only into living *tzedakah*, but into choosing to lead lives infused with Jewish values.

For you as an educator, the project presents significant challenges and awesome rewards. It takes time to prepare for the project. Once the structure is in place, however, most of the logistics are fairly easy. The reward is bringing *tzedakah* to life for your students and giving them a chance to participate actively and cooperatively in *tikkun olam*.

The goal of this manual is to give Jewish educators the essential information and material they need to create and operate youth foundations within synagogues and day schools. The manual anticipates and addresses many of the circumstances faced by different communities, but it is important that each teacher takes this material as a starting point and adapts it to his/her particular situation. Each school, community, and student body is different, but *Tzedakah in Action* should be able to accommodate most of the differences. In addition, each institution has its own internal financial guidelines and procedures and is governed by different state laws. This manual doesn't attempt to address all of the differences and the author and publisher take no responsibility and assume no liability for implementation of this project in violation of any federal, state, or local law. Each institution is responsible for developing a framework within which

this project can operate legally.

The manual is geared towards a seventh grade classroom. This approach reflects a number of considerations. First, I developed and implemented the program with seventh graders, so I can speak from experience. Second, the *B'nai Mitzvah* experience lends itself to this project in many important ways, including fundraising and community building. Finally, it seems easiest to have a baseline target audience while offering specific alternatives for other ages and grades on a case-by-case basis. With minor adaptations, the project can be successful for students ranging from middle school through high school.

In order to make the project accessible to as many teachers as possible, the manual assumes little if any background with Jewish traditions of *tzedakah* and with the mechanics of philanthropy. Having once been a twenty-year-old novice teacher who walked into a teaching position with less than ideal preparation, I want to insure that anyone with an interest in putting this project into practice has the tools necessary to accomplish that goal.



GOALS

TZEDAKAH IN ACTION was designed with four key goals. All of them are central to the way the program was conceived and implemented, and the educational programming addresses each of them.

1. *Educate Students in Tzedakah and Philanthropy*

The program contains a study unit that can be incorporated into a class curriculum. The unit includes lessons that discuss the practice and art of philanthropic giving and the value of *tzedakah* as an integral part of Jewish life. In addition, as part of the grant-making process, students learn how to develop grant guidelines, prepare and distribute Requests for Proposals (RFPs) and Grant Applications, review submitted Applications, and interview organizations during presentations before the Student Board of Trustees.

2. *Redirect Resources from Consumption to Tikkun Olam*

The project acts as a vehicle for channeling financial resources away from consumption and toward social justice through strategic fundraising and directed giving.

3. *Support Organizations Actively Engaged in Tikkun Olam*

The project provides targeted grants to support the work of non-profit organizations engaged in social justice work.

4. *Empower Young People to Engage in Tzedakah in Pursuit of Tikkun Olam*

The project fosters responsibility and effectiveness among young people by empowering

them with the skills to effect positive change in the real world. Every student in the class has a role in raising money and deciding how that money will be distributed to organizations that pursue positive change in the world.

HISTORY OF THE TEMPLE ISAIAH SEVENTH GRADE FUND

TZEDAKAH IN ACTION began at Temple Isaiah, a large Reform synagogue in Lafayette, California. Temple Isaiah's *Tzedakah in Action* program, called the Seventh Grade Fund, was inspired by a program at Brandeis Hillel Day School in San Francisco.¹ After learning about Brandeis Hillel's program, Temple Isaiah decided to pursue a similar project in its supplemental religious school program. The program got underway during the 1998-99 school year and has been in continuous operation ever since.

The Fund's history of giving is diverse. Each year, the Board of Trustees makes a significant departure from the previous year's theme, encouraging the staff to learn about a new field and a broad range of new non-profit organizations. Throughout the development of the program, teachers, staff, and the community engaged in healthy and productive critical evaluation of the program, leading to multiple revisions and refinements. Temple Isaiah is very excited to share the history of the Seventh Grade Fund as a challenge and inspiration for other *Tzedakah in Action* programs.

HISTORY OF SEVENTH GRADE FUND GRANT AWARDS (1998-2002)²

<i>2001-2002</i>	HUMAN RIGHTS	<i>Total Grants: \$17,500</i>
<i>Recipients:</i>	Human Rights Congress for Bangladesh Minorities International Justice Mission Association for Encounter Projects Free the Slaves/Anti-Slavery International	
<i>2000-2001</i>	ANIMALS AND THE ENVIRONMENT	<i>Total Grants: \$22,000</i>
<i>Recipients:</i>	The American Society for the Prevention of Cruelty to Animals The Earthjustice Legal Defense Fund Pets Unlimited The Valley Humane Society Voices for Pets	
<i>1999-2000</i>	MEDICAL RESEARCH AND TREATMENT	<i>Total Grants: \$17,125</i>
<i>Recipients:</i>	The American Heart Association The Diabetic Youth Foundation The San Francisco Community Clinic Consortium Street Outreach Services The Susan G. Komen Breast Cancer Foundation	
<i>1998-1999</i>	CHILDREN IN NEED	<i>Total Grants: \$16,500</i>
<i>Recipients:</i>	Bay Area Young Positives Big Brothers/Big Sisters of the East Bay The Center for the Education of the Infant Deaf The Elizabeth Glaser Pediatric AIDS Foundation The Greater Bay Area Make-A-Wish Foundation	

A NOTE ON NAMING: In order to make this program accessible to students in many grades, we decided to change the name from the Seventh Grade Fund to *Tzedakah in Action*. We want to acknowledge that the change wasn't made without reservation. It seems a bit redundant – *tzedakah* is action. Nonetheless, *Tzedakah in Action* satisfies two important criteria. First, it is specifically Jewish. Second, it's fairly accessible to non-Jews, which is an important prerequisite for good relations with non-Jewish grant-seeking organizations. You are under no obligation to retain the name *Tzedakah in Action*, but you are encouraged to keep these criteria in mind if you choose an alternative.

Endnotes

¹For the article that inspired Temple Isaiah's Seventh Grade Fund, see: Don Lattin, "Taking the *Torah* to Heart: 7th-graders give *bar mitzvah*, *bat mitzvah* money to charity," sfgate.com: San Francisco Chronicle, 3 April 1998, on-line at <<http://www.sfgate.com/cgi-bin/article.cgi?file=/chronicle/archive/1998/04/03/MN4I460.DTL>>.

²Not all grant recipients received grants of equal size.

Setting up the Foundation



WHILE THE DAY-to-day operation of the foundation is fairly straightforward, significant preparatory work is necessary to insure its efficient operation. Ideally, the groundwork should be complete by the end of the school year preceding the first year of implementation. This timeline is fairly general, with many of the details dependent on your community's particular situation (e.g. Will the project need the approval of the organization's Board of Directors? etc.). Details about each of the steps can be found in later chapters.

SCHOOL YEAR PRECEDING IMPLEMENTATION

January Find allies, organize a planning team.

February-March Meet with professional financial staff to create a segregated account and procedures; prepare formal proposal and presentation for relevant decision-makers.

April-May Present proposal to decision-makers and obtain formal institutional support.

SCHOOL YEAR OF IMPLEMENTATION

September-October Present the project to the class and vote to implement.

October-December Begin fundraising; classroom educational activities.

December Select issue; develop Grant

Guidelines; prepare Request For Proposals (RFPs) and Grant Application; collaborate on list of potential grant recipients.

January-February Distribute RFPs and collect proposals.

March-April Complete fundraising; evaluate proposals and invite presentations; deliberate and make grant decisions.

May-June Incorporate the grant decision announcements/presentations into school graduation or end-of-year ceremonies.

Also please note: *Tzedakah in Action* is designed as an adjunct to an existing curriculum. To expand it into a comprehensive full year program would require significant additional programming. The following is a rough estimate of the amount of classroom time you can expect to spend on each phase of the project (though this is highly dependent on how extensive you make the study phase and how many organizations submit proposals):

- Presentation and voting 2 hrs.
- Study 8-10 hrs.
- Board Mtgs./Fundraising 3-4 hrs.
- Proposal Eval./Decision-Making 10-12hrs.



CONVINCING THE COMMUNITY THIS IS A GOOD IDEA

FIRST OF ALL, it is a good idea and all you need to do is help the community realize that. Certainly there will be some resistance that you will need to overcome, but in all but the most unusual cases, that resistance will result from confusion and misunderstanding and not from genuine opposition to the goals and objectives of the project.

So what's the first step? Find allies!

There are a number of different constituencies who will be impacted by the project and it will be to your advantage to recruit members of each group to advocate within their spheres of influence. This means that parents, professional staff (e.g. rabbis, education directors/principals, teachers, etc.), and lay leadership should all be involved in the strategy sessions **before** the issue is put to any kind of vote and before final decisions of any kind are made.

A question which invariably arises here is whether or not students should be involved during this phase. To a large extent, this depends on the particular circumstances of your community. As a general rule, with younger students (e.g. middle school), it is probably better to set the ground rules before students are invited to participate. The inexperience of younger students makes it more likely that they will have a harder time grasping the broad range of issues presented by the program. The risks of involving them too early include misunderstanding the necessity of compromises and potential

disappointment/disillusionment if the project does not go forward. By the same token, once the ground rules are set and the institution's commitment to the program is clarified, involving students in the process can help fine-tune the pitch to appeal to student concerns and can develop a fifth column constituency of advocates within the class.

With older students, early involvement will likely have a positive impact on the ultimate degree of buy-in by students once the project is adopted. When peer pressure is oriented toward a positive goal, it can be a helpful force. There are risks here, too, that should be addressed. It's crucial that students appreciate the logistical constraints of working within a large institutional setting and every effort should be made to help them understand why certain compromises are made.

While it is very important to have a clear plan and program developed before presenting the project to the class as a whole, there is always a risk that students and their parents will feel ambushed by having a huge new program that seems to cost money dropped in their laps. In order to mitigate this challenge, go for the soft sell and make sure that no one feels railroaded into the project. In practical terms, families should be given time (a week between classes should be sufficient) to discuss the proposal before they are asked to vote.

Another decision that needs to be resolved before the project comes to a vote is how the Foundation will be funded. You'll read more about this in Chapter 2, but it's

important to be clear in advance what kind of financial commitment will be asked of students' families. If family contributions will be part of the income stream for the foundation, you'll need to decide if those contributions will be in the form of voluntary donations or compulsory fees.

There are pros and cons to each of these choices, though the voluntary donation format is probably the best. By framing family contributions in terms of donations, you'll maintain the feeling of independent choice among families in the class. By going this route, however, it's important that members of the class understand that the program will not succeed (and they should not vote for it) if they aren't willing to meet their voluntary commitment to contribute.

Once the groundwork is complete and the program you're going to propose is clear, it's time to present the project to the class for a vote. This presentation should be prepared carefully and every effort should be made to have 100% attendance by students and their parents – a well-publicized, regularly scheduled class session is probably the best context for the meeting. During the session, the following topics should be covered:

- Brief introduction to *tzedakah* and the goals and values that underlie the project. (See sample FAQ sheet on p.83.)
- Overview of the project's mechanics, including schedule, sources of revenue, educational programming, grant cycle process, and especially student and parent responsibilities.

The presentation is a wonderful opportunity to involve many people in promoting the project. Invite your rabbi to introduce the principles of *tzedakah*. Ask a parent who helped design the proposal to address parental concerns. If students were involved with the development of the proposal, have them speak to other students about their particular concerns and questions. If people make particularly valuable suggestions or comments, don't hesitate to incorporate them into the project. If the vote is not successful, you can solicit different perspectives in an effort to repackage the project for another vote.

The first year you attempt to implement the program will obviously be the most challenging. After you've got one grant cycle under your belt, you'll have additional resources you can bring to bear in each year's presentation. These include:

- Students and parents who have already participated in the program. *Tzedakah in Action* alumni are particularly effective at assuaging the concerns of students and parents who may feel that staff are not entirely objective.

- Brief presentations by previous years' grant recipients. Most grant recipients will be thrilled to attend a class session the year after they receive a grant to talk about how valuable *Tzedakah in Action's* work is. These presentations are such a powerful source of goodwill that Temple Isaiah's Seventh Grade Fund started including a tentative request for future presentations in its grant award letters. See sample and letter on page 91.

The voting threshold you set for implementation of the program should be sufficiently high that a vote in favor equates with a commitment to participate. At Temple Isaiah, that threshold was an 80% majority. This meant that a few naysayers could not torpedo the program, but implementation was predicated on a near-consensus class commitment.

CREATING A TIKKUN OLAM CULTURE: *TZEDAKAH IN ACTION* IN A BROADER CONTEXT

DEBATES ABOUT THE role of *tikkun olam* within the Jewish community aside, the project will benefit from and also encourage a culture of social action within your school or synagogue. At Temple Isaiah, it fit naturally within a synagogue-wide culture already strongly committed to volunteerism and social justice. A community can embrace social action in many ways and an organization faces many decisions in order to encourage this kind of culture. While these changes are not prerequisites for *Tzedakah in Action* to be successful, they will complement and add to the overall effectiveness of the project. What follows is a brief list of suggestions that any Jewish school can implement to encourage a social action culture.

COORDINATED SCHOOL-WIDE
TZEDAKAH PLANNING

IN MOST RELIGIOUS schools, students drop coins into *tzedakah* boxes all year long as a way of fulfilling the *mitzvah* of *tzedakah*. At the end of the year, allocation decisions are made in many different ways: the teacher may come up with a list of possible organizations to receive the collected monies, students may nominate pet projects, or each class's collected funds may be subsumed into a school-wide *tzedakah* pool and divvied up some other way.

Here's an alternative. Pick a "*tzedakah* theme" for each class. Ideally, *tzedakah* themes will reflect curricular objectives. For example, for a class studying "Jewish Communities Around the World," the *tzedakah* theme could be "New Immigrants in Israel." In addition to their regular coursework, students could spend some time studying the way Israel absorbs Jewish immigrants from around the world and could commit their *tzedakah* to supporting that work.

An alternate version of the "*tzedakah* theme" involves linking each class with a specific organization. For example, a class studying Jewish holidays could connect its study of *Sukkot* to the organization "Habitat for Humanity," with which it could maintain a year-long relationship. While this may be more difficult to coordinate, it offers some unique benefits. Students could put a poster about their organization outside their class-

room to remind parents to send their children with *tzedakah* and to educate the community about different *tzedakah* recipients.

Representatives of the organization could visit the classroom and talk about the work they do. Students might have an opportunity for a site visit to see the organization in action. On an institutional level, such an arrangement would create informal relationships between the Jewish community and other local non-profit organizations. In addition to these educational advantages, the students' ability to see and talk to the ultimate recipients of their *tzedakah* will make fulfilling the *mitzvah* more tangible and will most likely encourage greater giving.

In addition, there are a number of other ways that the ordinary *tzedakah* collection process can be made more meaningful:³

- When the class is making decisions about how to allocate its *tzedakah*, bring the money to class in cash (coins and small bills) so they have a tangible sense of the money.
- Provide statistics in class on fundraising progress throughout the year.
- Have students take responsibility for distributing *tzedakah* funds, either by writing the letters or delivering the checks in person.
- Post each class's *tzedakah* decisions and the thank-you letters that the school receives on a *Tzedakah* Bulletin Board and in the school or synagogue bulletin.

SIMCHA SOCIAL ACTION

ENCOURAGE STUDENTS AND their families to incorporate social action into Jewish rituals and rites of passage. This is particularly relevant in a seventh grade program, when *b'nai mitzvah* parties are so central to the social landscape. The following is a brief list of projects that students incorporated into their celebrations at Temple Isaiah: ⁴

- A *Bat Mitzvah* who loves animals and volunteers at the Humane Society created centerpieces at her party made out of pet food and pet toys that were later donated to the Humane Society.

- A *Bar Mitzvah* researched various charitable organizations and decided to donate a percentage of the money he received to the San Francisco AIDS Foundation and to volunteer at the St. Anthony's Foundation.

- Instead of having a theme and centerpieces at her party, a *Bat Mitzvah* donated the money her family would have spent on centerpieces to help fund a cure for breast cancer.

- A *Bar Mitzvah* included a note in his invitation requesting that in lieu of gifts to him, people make a donation either to Habitat for Humanity or to the Temple

Library in his grandfather's honor. When some guests still chose to give him cash directly, he split the money up between the two causes.

- A *Bat Mitzvah* distributed information at her party about www.thehungersite.com (a web-site that raises money to provide food for people in developing countries).

- A *Bat Mitzvah* took the theme of trees from her *Torah* portion (*Toledot* – a portion filled with generations of family trees) and incorporated it into the decorations at her celebration. In addition, she took a percentage of her monetary gifts and donated the money to help plant trees for the landscaping around the religious school building.

- A *Bar Mitzvah* asked guests sharing in his celebration to bring donations for Glide Memorial Church, which he delivered when he volunteered there

for a day serving food to the homeless. In addition, he researched various causes and donated 10% of the money he received to *tzedakah* (Rambam's recommended minimum *tzedakah* obligation).

- A young man who became a *Bar Mitzvah* on the weekend before Thanksgiving asked guests to bring food donations (especially turkeys) that were then donated to a local food bank and soup kitchen.

MAZON: A Jewish Response to Hunger

This organization offers a wonderful challenge and opportunity to capitalize on celebration expenses. Mazon's brilliant angle is to suggest that, on a voluntary basis, anyone planning a *simcha* for a lifecycle event set aside 3% of the planned expenses to donate to Mazon. It's a great idea, and one which you should add to the list of ways to create a *tikkun olam* culture! You can find Mazon at www.mazon.org.

- In lieu of floral centerpieces, one family filled galvanized steel buckets with bulk food items (like pasta, rice, and canned goods), wrapped them in cellophane, and attached balloons to them. After the party, they donated the buckets to the Contra Costa AIDS Center. The family printed small cards explaining the buckets and the organization and put them on the tables.

- A *Bat Mitzvah* chose to make her party alcohol-free as an example that people can have fun without alcohol and as a statement against the problems that alcohol causes in our society, especially among young people.

- Two classmates who became *B'nai Mitzvah* on the same day sent a small note with their invitations asking guests to bring a book to be donated to the Contra Costa Library System's Project Second Chance – a local adult literacy program. After the weekend, the *B'nai Mitzvah* delivered the books together.

- A family delivered all the leftover food from their luncheon and party to the JCC Seniors Program.

- A family made centerpieces out of bags of art supplies. After the party, they donated the supplies to a children's program at a local shelter for victims of domestic violence.

- A family donated 3% of the cost of their celebration to homeless people living in San Francisco. The *Bat Mitzvah* donated the money directly to individuals living on the street in 5-6 visits over 2 months after developing her own set of criteria for individuals who needed the money the most.

- A *Bar Mitzvah* talked to a teacher he had volunteered for in 4th and 5th grades, helping autistic children, and got a list of supplies she needed for the program. His family included the list in their invitations and collected gift certificates and supplies that they later donated to the program.

- Many *B'nai Mitzvah* chose to speak about the Seventh Grade Fund and *Mitzvah Corps* projects in their *d'verei torah* when they became *B'nai Mitzvah* in order to share their commitment to *tikkun olam* with the congregation.

MITZVAH DAY

MITZVAH DAY IS a day-long celebration of *tikkun olam*. For one day, an entire Jewish community is invited by the synagogue or school to participate in a variety of community service projects. These range from maintenance work around the facility to sorting food at a local food bank to cleaning up parks and open spaces to socializing with senior citizens at a home for Jewish parents. Again, this is a project that requires significant work, but it can have a profound impact on a community's collective consciousness of and commitment to *tikkun olam*.⁵

MITZVAH CORPS

THE SEVENTH GRADE Fund was a natural at Temple Isaiah because the seventh grade program already had a significant social action component – the *Mitzvah Corps*. The *Mitzvah Corps* is to volunteerism what

Tzedakah in Action is to philanthropy. Students engage in service learning, studying Jewish social justice concepts in class and then volunteering at local non-profit organizations to put their learning into practice. For example, after a unit of study on the *mitzvot* surrounding *chesed shel emet* (honoring the dead), students spend a class period cleaning grave markers at the local Jewish cemetery. Students study Jewish laws on feeding the hungry and then spend the class period the following week working at a local food shelf. And after learning about Jewish perspectives on *kibud zekaynim* (honoring the elderly), students spend a session socializing with people living with Alzheimer's disease at a group home in the community.

A program of this sort clearly involves substantial institutional commitment and time investment and should not be undertaken casually. Among the challenges are coordinating group projects with multiple community non-profits, arranging transportation, and developing lesson plans appropriate to each project.

By the same token, the potential rewards are very large. For the students, there are multiple benefits. Putting what they've learned into practice takes the values out of the abstract and puts them squarely in the real world. This not only encourages positive behavior, but also reinforces the notion that Judaism is a way of life that transcends the synagogue and classroom and that it has lessons for real life that can be put into practice. Furthermore, it gives students practical exposure to the world of community service

that will hopefully encourage a life-long commitment to volunteerism. For the institution, it creates an opportunity to establish mutually beneficial relationships with other local non-profits in a way that builds goodwill and community integration.

HOLIDAY SOCIAL ACTION: *HANUKKAH*, *PESACH*, AND *SUKKOT* FOR EVERYONE

JEWISH HOLIDAYS PROVIDE natural opportunities to encourage social action experiences. *Hanukkah* often involves consumption patterns similar to those that arise with *B'nai Mitzvah* gift-giving. It's another unfortunate example of the meaning of a holiday or ritual getting obscured by materialism. The idea behind "*Hanukkah* for Everyone" is that families set aside one night of *Hanukkah* for *tzedakah*. Instead of receiving eight nights' worth of gifts, each family designates one night's gift budget for *tzedakah* and spends that evening discussing and deciding what organization(s) the family wants to support with its money. "*Hanukkah* for Everyone" supports multiple *tzedakah* goals that parallel those of *Tzedakah in Action*. First, it replaces consumption with *tzedakah*. Second, it introduces concrete *tzedakah* practice into the home.

This not only reinforces the message that students get at school, but also encourages a family dynamic in which Jewish values are incorporated into cooperative family decision-making. It also creates a wonderful opportunity for children to take responsibility for teaching their parents about Jewish values and encouraging Jewish practice at home.

The same principle can be applied to the redemption of the *afikomen* on *Pesach*. Instead of rewarding the child who finds the *afikomen* with money, allow that child to choose the organization that will receive the family's *afikomen* donation. You can certainly take advantage of the opportunity to explore organizations that relate to the redemption theme of *Pesach* (e.g. Amnesty International, Human Rights Watch, etc.)

On a similar note, *Sukkot*, with its theme of temporary housing, provides an excellent opportunity to discuss and work on issues of homelessness in your community. In short, every Jewish holiday presents an opportunity to engage with the world through *tikkun olam*. Helping people find those opportunities is a great way to create a *tikkun olam* culture.

TZEDAKAH COLLECTIVES

IMAGINE *TZEDAKAH IN Action* for adults and you've got a *tzedakah* collective. *Tzedakah* collectives grew up alongside the *havurah* movement in America in the 1970s and have paralleled its popularity since then.⁶ Clearly, the creation of a thriving *tzedakah* collective movement in your community would have an incredibly positive effect on *Tzedakah in Action*.

INFORMAL EDUCATIONAL PROGRAMMING

INCORPORATING *TZEDAKAH* THEMES into informal educational programming in youth group and day camp settings is another way

to weave *tzedakah* into the fabric of your community. This can be as simple as passing the *tzedakah* box at the beginning of each youth group program or camp day. It could also mean discussing Jewish perspectives on panhandling before a youth group event in which participants may encounter panhandlers (see *Judaism and Beggars* on p.36). Another possibility is building an entire program or camp day around *tzedakah* (see the sample youth group program in Appendix C on p.80).

FUND MANAGEMENT

FOR THE MOST part, these are matters that must be discussed and resolved with the financial officers in your institution. What follows are some critical issues you need to consider.

CREATING THE FOUNDATION ACCOUNT

IF YOUR SCHOOL has a scholarship fund or any other type of fund that does not run out of the institution's annual operating budget, this should be very easy. You are just going to create another account for *Tzedakah in Action*.

Depending on the institution, this may be an entirely separate checking account or simply a subsection of the main operating account. It's important that the account be created under the auspices of your institution so that it is covered by your 501(c)(3) status (see below for more information on 501(c)(3)). By the same token, your *Tzedakah in Action* fund needs to be separate in order

to simplify bookkeeping, maintain appropriate records in case of audit, and ensure that the funds are protected and used only for foundation grants.

Be sure when you're doing this that there's a written policy indicating that all funds going into the account should only be allocated and distributed according to the wishes of the *Tzedakah in Action* Board of Trustees. This ensures that when your institution is periodically audited, it will be clear what the account is and who makes the decisions about how the money is spent.

Ultimately, this is something which the financial officers and staff of your synagogue or school should manage. It's not terribly difficult and they should know how to do it legally and in keeping with your institution's fiscal guidelines.

BOOKKEEPING

IT'S A GOOD idea to maintain a separate and simultaneous ledger of donations to the foundation. Make arrangements with the bookkeeper (or whoever is responsible for managing the institution's finances) to give you regular updates of activity in the fund, including all donations and fundraising receipts. Disbursements from the account (i.e. grants) can also be tracked this way, though these will obviously be much less frequent and you'll be initiating them. In addition to those updates, you should maintain a simple ledger sheet that tracks receipts as they come in and identifies their sources. In order to maintain confidentiality, the

people allowed to see these accounting records should be very limited (probably just you, the Principal/Education Director, the bookkeeper, and the Executive Director of your school or synagogue).

EVERYTHING YOU EVER WANTED TO KNOW ABOUT NON-PROFITS, TAX EXEMPTION, AND 501(C)(3) STATUS

What is 501(c)(3) status?

Whether you are planning to create a *Tzedakah in Action* program in a synagogue supplemental school, a day school, or anywhere else, odds are that you're working for a non-profit organization, also known as a 501(c)(3) organization. 501(c)(3) is a reference to the section of TITLE 26 (the United States Internal Revenue Code) that explains a non-profit organization's unique relationship with the IRS. (If your organization does not have 501(c)(3) status, you will need to work with the administration to determine how *Tzedakah in Action* should operate within the organization.)

Why do we need to know about 501(c)(3)?

501(c)(3) status affects you in two major ways. First of all, it provides your organization with a couple of valuable tax benefits. Number one, your organization and the foundation don't have to pay corporate income taxes. Second, people can make donations to your organization and the foundation and deduct those donations from their personal income taxes. This is obviously a big incentive for a lot of people to make charitable donations.

The other way 501(c)(3) is relevant is that your foundation will be directing its grants exclusively to other 501(c)(3) organizations. It's very important that you remember to check the 501(c)(3) status of all organizations that apply for grants from your foundation.

Do we need to provide receipts for donations made to the foundation?

As of this writing, a donor can claim a tax deduction for a donation up to \$250 without a receipt. However, it's a good idea to send out a receipt for every donation you receive. This will reduce the potential for misunderstandings over whether and when you received a particular donation. It will also protect you and your donors if the law changes. The best method is to set up a simple mail-merge form letter system so you can also keep a running database tally of donations. (If you don't know how to do this, ask someone with word-processing savvy and s/he should be able to help you – it's a fairly simple procedure.) With a database record, you'll also be able to double-check your accounting on a regular basis (see *Bookkeeping* on p. 17). The receipt doesn't have to be in any particular format, but it must include an explicit acknowledgement of (1) the amount of the donation, (2) the tax-exempt status of your organization, and (3) the fact that no services were provided in exchange for the donation.

What about merchandise or service donations for auctions, etc.?

These are also tax-deductible for donors, though you need to add a line to the receipt. You need to issue a receipt that provides a "good faith estimate of the fair market value of the goods or services... received."⁷

What if we have a fundraiser in which donors receive something in exchange for their donation?

This adds another level of complexity, but is also not too difficult. Essentially, the value of the donation **above and beyond the value of the goods or services the donor receives** is tax-deductible. For example, if you hold a pasta dinner and charge \$25 per person and estimate that it costs \$5 per person to provide the meal, each person is entitled to take a tax deduction for \$20. Under these circumstances, a receipt must (1) inform the donor that the portion of the contribution that is tax-deductible is limited to the excess value of the donation over the value of the goods or services provided by the foundation, and (2) provide the donor with a "good faith estimate of the fair market value of the goods or services... received."⁸

Should we invest the foundation's assets to earn interest?

In a word, no. First of all, there are few financial advantages to investing on such a short-term basis. *Tzedakah in Action* operates on a rapid turnaround between raising money and distributing it. You won't make very much by investing for such a short time. Second, every investment has risk and it would be damaging to the credibility of the program to lose part of the principal due to a bad investment.

A reasonable follow-up question arises as to whether or not you should retain part of the collected funds each year to build up principal in the foundation account. Theoretically, over the long-term, this would guarantee a certain level of interest income. However, there are two very good reasons for spending your fund down to zero each year. First, there's always a chance that the project will not be adopted by the next year's class, leading to the problem of what to do with the money. Second, and more importantly, it's not really fair to each year's class. The students in each class have decided to make a personal sacrifice in order to be part of the project and they should be the full beneficiaries of the experience. Deferring part of their investment to some future class contradicts the primary educational mission of the project.

Do we need to register the foundation with the IRS in order to receive 501(c)(3) benefits?

As long as you're operating under the auspices of a certified 501(c)(3)

organization, you don't need to certify the foundation independently. Your school or synagogue's certification covers all auxiliaries.

Anything else I need to know?

The students need to make the final decisions about grant distribution! Not only is this essential to realizing the goals of the project, it is also entirely in keeping with the spirit of the tax code. Help them, ask them challenging questions, advise them, but don't interfere with their ultimate decisions.

Where can I find more information about tax-exempt status?

If you'd like to examine the official document from which all this information is derived, it's available in its entirety at <http://ftp.fedworld.gov/pub/irs-pdf/p557.pdf>.



Endnotes

³Siegel 146-50.

⁴A list like this, compiled from the *b'nai mitzvah* social action projects that your congregants create, is a wonderful thing to distribute to families at the beginning of the *b'nai mitzvah* cycle.

⁵The Commission on Social Action of Reform Judaism has published a *Mitzvah Day Manual* to help congregations set up their own *Mitzvah Day*. You can order it at <http://rac.org/pubs/mitzvah.html>.

⁶The Shefa Fund, a public foundation that advocates many aspects of *tzedakah* practice, has identified inspiring and organizing *tzedakah* collectives as one of its major goals.

⁷United States Government, Department of the Treasury, Internal Revenue Service, Publication 557: *Tax Exempt Status for Your Organization* (Washington, DC: Internal Revenue Service, 2001)II.

⁸U.S. Government II.

Fundraising



*One who can cause others to give
has a greater reward than the giver.*
— Shulchan Aruch 249:5

AS CLICHÉD AS IT SOUNDS, money makes *Tzedakah in Action* go 'round. Without funds, there's no foundation. Therefore, fundraising will definitely be a central component of your work. It's also one of the areas that will vary dramatically based on the size of the class and the financial resources of the community and institution. Finally, the level of fundraising that your class can sustain will determine the size and number of grants that the foundation can support and therefore the types of organizations you can target to support. With all that in mind, it's important to know that the project can have a successful educational impact regardless of the size of its financial resources.

In other words, while the impact of the foundation's grants matters, the process of actively engaging in the work of *tzedakah* is far more important for the students than the size or number of the grants. If the students gain an appreciation for the value of *tzedakah* as an imperative in their own lives, their continued giving over a lifetime will magnify the immediate effects of the project many times.

It's also important to note that large class size poses challenges as well as benefits. While smaller classes may have a more difficult time raising large sums of money, their discussion and decision-making processes will likely be more accessible and interactive. You should recognize both the challenges and the opportunities presented by your unique situation.

With some hard work and determination, a small class of 10-15 students should certainly be able to raise \$2,500-\$5,000 and a large class of 60-80 should be able to raise at least \$15-20,000. While the organizations that a \$3,000 foundation can target will often be different from those that a \$25,000 foundation can target, there are effective and well-run non-profits at every level of the grant-receiving spectrum. These can range from local short-term efforts to ban animal traps to massive national and international non-profits, like Greenpeace, Doctors Without Borders, and Oxfam, for whom even the largest *Tzedakah in Action* donation is going to represent a very small percentage of their annual budget.

The goal is to set a fundraising target that will challenge students, but one which they will be able to achieve. If it takes some work, the students will appreciate their accomplishment much more.

REDIRECTING RESOURCES FROM OTHER AREAS — THE *BAR/BAT* *MITZVAH* SHELL GAME

THE FIRST SOURCE of fundraising to consider ought to be the students themselves. Not only are they a potentially lucrative resource, but gaining a personal stake in the project by making a financial sacrifice can have a significant impact on student ownership of the project. They will be much more invested in the outcome if they feel like they are giving away their own money.

In the case of a seventh grade class, there's an obvious and simple first source to think about — *Bar* and *Bat Mitzvah* gifts! The easiest way is to ask the class to agree not to buy each other gifts when they become *B'nai Mitzvah*. Each family can then donate to the foundation the money it has saved by not having to buy these gifts.

Parents will certainly appreciate the fact that they will not have to keep track of gifts that need to be purchased and that their gifts will be tax-deductible donations. **And don't underestimate students' desire to do the right thing!** The choice to make this kind of sacrifice (and it really must be a choice that the class undertakes voluntarily and democratically) is historic, momentous, and transformative, and students and their families should be applauded for their courage and *menshlichkeit*.

When implementing this strategy, it's a good idea to set a baseline recommendation for each family's donation to the foundation. The recommended minimum should take into account the size of the class — you should be able to roughly equate the recommended minimum with the cost of the gifts each family would have had to buy without this provision. The economic resources of the community must also be taken into account when determining the baseline donation.

As a somewhat more cumbersome variation on the strategy above, students can be invited to donate a certain percentage of the cash gifts they receive. While this method seems more equitable, its fairness is

offset by a number of problems. First of all, the collection logistics are complex. Secondly, it will be more difficult to accurately predict the ultimate size of the foundation's assets and therefore, more difficult to set funding goals. Finally, it doesn't allow for a timely collection of funds. Seventh grade students often become *B'nai Mitzvah* well into eighth grade. This means that a certain (potentially significant) portion of the class would not contribute to their own foundation.

This strategy can be adapted to work in other grades as well, though the pool of available funds may not be as large or as obvious. Certainly a Confirmation or graduation linkage would be easy to make, and may in fact be easier to pitch to students, since they are older and may be more receptive to the idea of personal sacrifice.

HIGH IMPACT FUNDRAISERS

IN ADDITION TO encouraging students to make a financial commitment to the project, there's an opportunity for them to invest "sweat equity."⁹ Your fundraising should be high impact and broad-based, hopefully generating a large return on time investment and involving as much of the class as possible. What follows are a couple of ideas for fundraisers that have the potential to raise large sums of money.

THE SILENT AUCTION

IN ADDITION TO high revenue potential, silent auctions have other things going for them. First, they involve little overhead cost. This means that all revenue can be directed into the foundation. Second, and more importantly, a silent auction is a cooperative enterprise. While the preparation and logistics of the auction may fall primarily on staff, the actual goods and services auctioned are provided by the students and their parents.

If you've never been part of a silent auction, this is how it works: Students (and anyone else who's interested) are solicited to donate goods and services to be placed up for auction. Auction items can include sports or concert tickets, babysitting or lawn-mowing services, fresh baked goods, original artwork, weekend get-aways at vacation homes, etc. Everything is put up for auction at an event. The "silent" part refers to the fact that everything in the auction is put out on tables and people browse from item to item, writing down their bids on lists in front of each item. When the auction ends, the highest bidder for each item wins and gets to pay the bid price and take the item.

There are a number of logistical considerations in making a silent auction successful:

- It's extremely helpful to tie a silent auction to another event that's already going to draw a big crowd. This gives both events the opportunity to build on each other's

natural audience. *Purim* carnivals work especially well, but school open houses, annual membership meetings, *Hanukkah* dinners, etc., are also excellent opportunities. If you're going to pursue this, be sure to have the auction and the cause included in publicity for the other event (assuming the event organizers are happy to have you piggyback).

- Dress it up. It doesn't cost very much to buy a few plastic tablecloths and to make the bidding sheets look crisp (see the example on p.87).

- Have an information sheet available that describes your *Tzedakah in Action* project, so people know where their money will be going (the FAQ sheet on p.83 works well for this).

- Hold on to the sign-up sheets in case the winner opts out of his/her bid. This way you can go to the next person down on the list.

THE FREE CAR WASH

DESPITE ITS COUNTERINTUITIVE name, the free car wash is a fundraiser with impressive revenue potential. In essence, it's a car-wash-a-thon. Here's an analogy: In a walk-a-thon, people sponsor walkers for each mile they walk. In a car wash-a-thon, they sponsor participants for each car they wash. Each participant gets a sponsor sheet (see the sample sponsor sheet on p.87) and solicits sponsors for the car wash. There's one important distinction from a walk-a-thon – **in the free car wash, people sponsor the group for every car the entire group**

washes, not just the cars washed by the individual they sponsored. (This means that even if a student can't make it to the car wash, s/he can still get sponsors.) The math works out like this:

$$\begin{aligned} & (\# \text{ OF PARTICIPANTS}) \times \\ & (\text{TOTAL PLEDGED PER CAR}) \times \\ & (\# \text{ OF CARS WASHED}) = \\ & \text{TOTAL MONEY RAISED} \end{aligned}$$

For example, if 30 students participate and each collects \$1 per car washed in sponsorship and the group washes 100 cars, you raise \$3000. Instead of \$5 or \$10 per car, the group raises \$30 per car! And that's not the upper limit by any means. Odds are that for a cause as appealing as *Tzedakah in Action*, enthusiastic and committed students will be able to raise more than \$1 in sponsorship each. In addition, since sponsors are not actually receiving a service for their donation, it's 100% tax deductible. And you can encourage sponsors to have their cars washed, because the more cars students wash, the more money they raise. Always have *Tzedakah in Action* information sheets on hand. And don't forget to put a donation bucket out at the car wash and invite people to make additional contributions. It's a great idea to run the car wash during Sunday School or some similar event in which many cars move through the synagogue.

TAPPING THE DONATION POOL

IN MANY JEWISH organizations, there's an existing structure for soliciting and managing charitable donations: schools have scholarship funds, rabbis and educators have discretionary funds, etc. Making your *Tzedakah in Action* project available as a donation recipient will not only open up a new source of funding, but will also provide an additional avenue for educating the community about the project.

Keep in mind that this suggestion may encounter resistance from the beneficiaries and advocates of other funds. They may fear that *Tzedakah in Action* will draw donations away from their funds. While this shouldn't be a deal-breaker, be prepared to address it.

EMPLOYEE CORPORATE MATCHING GRANTS

THE CORPORATE MATCHING grant is a benefit some businesses offer their employees that allows workers to tap a pool of money set aside by their employers to increase the impact of their own philanthropic efforts. When a worker makes a tax-deductible contribution to a charitable organization, his/her employer matches the donation up to some annual limit per employee. For corporations, there are three distinct benefits.

First, they gain tax advantages by donating significant sums of money to

charitable causes. Second, they receive all of the attendant goodwill of publicity associated with their charitable giving. Finally, by giving to causes that are important to their workers, they enhance the relationship between employees and the corporation.

To the extent that individual donors (e.g. parents, congregants, etc.) are a part of your fundraising strategy, you should make every effort to solicit corporate matching grants. The key here is to offer frequent reminders to donors as you are soliciting them that they can and should pursue matching grants from the companies where they work and that you'll take care of all the paperwork. Don't worry – the paperwork is usually fairly simple.

FOUNDATION SUPPORT

EXTERNAL FOUNDATION SUPPORT (which was very important in the genesis of Temple Isaiah's Seventh Grade Fund) is also a potential source of seed money for *Tzedakah in Action*. There are three things you should consider before you pursue this option, however. First of all, foundations may not want to support long-term projects on an ongoing basis. Secondly, there are complex ethical considerations involved with taking grant money from one foundation to give to another foundation to make other grants. Not only is it inefficient, but it also introduces questions of accountability that can get complicated. Finally, it doesn't contribute a great deal to the learning experience for students.

Since the grant application process is usually very detailed and complex, it will probably require significant adult involvement and really isn't something that lends itself to large group work. (One exception to this consideration is if you're working with a small group of older students who have a lot of time to dedicate to the project and want to pursue matching funds from a foundation on an ongoing basis.) All this being said, pursuing foundation support for the first year or two of a *Tzedakah in Action* project is a good way to bolster your financial resources while you sort out the best long-term fundraising strategy.

Talking to a development officer at the local Federation or a local Jewish foundation is an excellent idea. They should be willing to offer you some direction about local foundations and give you some pointers about crafting a successful grant application. They might even be interested in offering some direct support to help build another local source of Jewish philanthropy. And remember that any pitch to a Foundation should emphasize the youth philanthropy angle of *Tzedakah in Action*.



Endnotes

⁹“Sweat equity” is a term used by Habitat for Humanity. The principle is that families who receive houses built by Habitat must spend a certain amount of time working on their own houses. This investment of “sweat equity” helps them to develop a stronger sense of ownership of the house than if it were just given to them.

*Transforming
Students
into Trustees*



NOW THAT YOU'VE done all the PR work with staff and congregants, set up all of the accounts, and gotten the ball rolling on your fund-raising campaign, you can get down to the real fun – TEACHING! What follows are a series of lesson plans and activities that cover three major themes: *tzedakah*, foundation operations, and group decision-making. The activities are listed in five categories: Introductory and Miscellaneous Activities, *Tzedakah* in Jewish Text and Tradition, Philanthropy, Brainstorming and Decision-Making, and the Work of *Tzedakah in Action*. Select those that will work most effectively in your program. At the end of the chapter, there are a series of copyable worksheets referenced in the activities.

Note that this selection of activities is nowhere near exhaustive and can be adapted and supplemented by other programming. There are many wonderful *tzedakah* curricula, from which many of the activities here have been adapted. Many can be incorporated into *Tzedakah in Action* very effectively (see Appendix B on p. 79 for sources and suggestions). Look around, talk to your colleagues, and be creative.

INTRODUCTORY & MISCELLANEOUS
ACTIVITIES

1. The Tootsie Roll Game
2. Some Thought-Provoking Questions
3. How Have You Helped Others and How Have Others Helped You?
4. Living High and Letting Die

TZEDAKAH IN JEWISH TEXT & TRADITION

1. *Tzedakah* Box Making
 - Text Study
 - Film Clips
 - Real Life *Kavod*
3. *Tzedakah* Guidelines
 - Rambam's Ladder
 - Judaism and Beggars

PHILANTHROPY

1. Philanthropy Is...
2. Philanthropy in the News
3. Independent Study

BRAINSTORMING & DECISION-MAKING

1. Brainstorming
2. The Maysport Repair Company

THE WORK OF TZEDAKAH IN ACTION

1. How *Tzedakah* in Action Works
2. Conflict of Interest
3. Foundation Simulation

INTRODUCTORY &
MISCELLANEOUS ACTIVITIES

THE TOOTSIE ROLL™ GAME

THIS IS A GREAT way to kick off the teaching series. It's fun, it involves food, and it gets to the heart of many of the complex issues that come up in group decision-making about grant-making. Each of the stores represents a different type of organization that might apply for grants from the foundation. After students play the game, which they can't lose, you can tease out a lot of interesting discussion while they nosh. Note that this exercise is built around a large teaching staff but can be adapted to a smaller staff configuration.

1. Write on the board: *There is only one rule in this game. You may not buy anything for yourself. All of your purchases must be for other people. If you are caught breaking this rule, all of your playmoney and snacks will be confiscated.* Make sure students read the board before beginning the game.

2. Set up the following "stores" in class before students arrive (make sure the deal each store is offering is clearly marked on a poster):

- TOOTSIE TOWN – 2 Tootsie Rolls for \$2 (must be given to 2 *different* people)
- ROCK 'N' TOOTSIE ROLL – 2 Tootsie Rolls for \$2 (both must be given to the same person)
- TOOTSIE HEAVEN – 2 Tootsie Rolls for \$2 (but store owner will quietly offer to kickback 1 of the 2 to the purchaser)

- TOOTSIE WORLD – 4 Tootsie Rolls for \$2 (but store owner gives them to people you don't know)
- ROLO ROUND-UP – 2 Rolos for \$2
- ABERTOOTSIE & FITCH – 2 Tootsie Rolls for \$4 (include a big advertising campaign – flyers, a barker, etc.)

3. Give each student \$5 in play money. They will be invited to wander around the classroom using their money to buy things for each other. Encourage them to do a little research on the different stores before they start spending money.

4. Debrief and Discussion:

What does this exercise have to do with foundations?

- Students were forced to use their money to help other people, not themselves. Foundations operate in the same way.
- While students were able to get some things, there were far too many choices for them to afford everything. Foundations almost always have to make choices among many competing applications, not all of which can be funded.

What did each store have to teach us?

- TOOTSIE TOWN represents organizations that provide “small” services for a large number of people.

What are some examples of organizations like this? Food banks, UNICEF, CARE, Oxfam, etc.

- ROCK ‘N’ TOOTSIE ROLL represents organizations that provide “large” services for a small number of people.

What are some examples of organizations like this? The Make-a-Wish Foundation, Ronald McDonald House, etc.

- TOOTSIE HEAVEN represents organizations that operate unethically. In this case, it's an organization that presents a “conflict of interest.”

What's a conflict of interest? It's when a person's private interests come into conflict with official responsibilities.

How might a conflict of interest come up in our foundation project? A student's parent might work for an organization that submits a proposal or an organization might offer some kind of gift to students during their presentation (engraved pencils are a favorite, seemingly innocent, example of this).

- TOOTSIE WORLD represents organizations that provide critical social services internationally. They may provide a larger return on investment, but the results are harder to see.

What are some examples of organizations like this? Doctors Without Borders, Amnesty International, etc.

- Because it's the only one serving Rolos, ROLO ROUND-UP represents organizations that appeal to each individual's personal interests and experiences. Depending on the individual, any organization can fall into this category.

What's an example of a way that your personal experience might affect the kind of organizations that we might fund? A student who is related to a breast cancer survivor might have a particular interest in supporting research into finding a cure for that disease. A student with a great love for animals may want to support local animal shelters.

NOTE: It's important that students know that there's nothing wrong with having a personal connection to an organization or a cause. Personal connections between funders and service providers are central to building good relationships and giving with kavod.

- ABERTOOTSIE & FITCH represents organizations that produce highly professional (and expensive) public relations campaigns which often lead to more successful fundraising. However, good PR doesn't necessarily correlate with successful or efficient provision of service. In addition, such campaigns certainly cost a great deal of money that might otherwise go to fulfilling the organization's mission. Again, professional PR isn't a reason to fund or not to fund; it's just one of many things that students should look at critically.

How might this issue come up within the context of Tzedakah in Action? Clearly, the quality of different organizations' proposals and presentations will vary a great deal. It's very important that students understand that the non-profit world is full of people with good ideas and people who are good presenters and the two aren't necessarily the same. There's a whole industry of non-profit consultants who help organizations craft their

grant proposals to get the most bang for the buck. For practical purposes, this means that students shouldn't be too wowed by beautifully formatted proposals and video presentations and shouldn't automatically discount less impressive applications. Encourage them to look at substance more than at presentation. This is a subtle distinction and it may be more appropriate to spend significant time on it with older students.



SOME THOUGHT-PROVOKING QUESTIONS¹⁰

THESE QUESTIONS CAN be incorporated in various ways throughout the *Tzedakah in Action* process. Students can be encouraged to take a particular question home and talk about it with their families. Students may keep journals in which they respond to a different question each class period. Class sessions can begin with a quick-write essay on one of the questions.

- Describe a time when you helped someone or someone helped you. Give the details of what happened and describe how you felt.

- Interview a parent, grandparent, teacher, or mentor and ask what philanthropy means to him/her. In what philanthropic activities has s/he been involved over the course of his/her life? How has his/her relationship with philanthropy changed?

- Describe a volunteer activity you've been involved in recently. Tell all about the situation, including what you did and how you felt.

- A bumper sticker says, “Practice Random Kindness and Senseless Acts of Beauty.” Describe a time when you were either on the giving or the receiving end of an act of random kindness or senseless beauty OR go out and commit such an act and then write about what happened.

- If you had \$50 to improve the world, how would you spend it? What if you had \$500? \$5,000? \$50,000?

- What’s the most difficult thing about being involved in *Tzedakah in Action*? What’s the most rewarding thing?

- If you were asked to deliver a short speech explaining *Tzedakah in Action* to your regular school class or a group of non-Jewish peers, what would you say?

- What has been the most boring, uncomfortable, or depressing aspect of your experience with *Tzedakah in Action*?

- Look through newspapers and magazines for an article that relates to philanthropy. Write a summary of the article and any personal reactions you have to it. (If you do this activity, be sure to keep a scrapbook of the articles and students’ reactions.)

- Which of your personal skills will make the greatest contribution to the success of *Tzedakah in Action*?

- What do you wish you had been told at the beginning of this project that would have made the experience better?

- How have you changed as a result of your involvement with *Tzedakah in Action*? What have you learned from the experience?



HOW HAVE YOU HELPED OTHERS & HOW HAVE OTHERS HELPED YOU?¹¹

THIS EXERCISE PROVIDES students with an opportunity to examine interdependence in their lives. Distribute copies of the worksheets on pp. 52-53 and give students 10-20 minutes to fill in the charts. As students finish, put them in small groups of 3-4 and have them share their responses. This should spark additional ideas and examples so everyone will be able to fill in many if not most of the boxes. After the exercise, gather everyone together and discuss the responses.



LIVING HIGH AND LETTING DIE:¹² AN EXPLORATION OF SURPRISING AND ENLIGHTENING MORAL DILEMMAS

NOTE: This discussion is suited to high school students, though it can be adapted to younger students.

I. PRESENT THE VINTAGE SEDAN AND THE ENVELOPE.

After reading each scenario, ask students whether they consider the behavior immoral. After both have been presented, ask in which scenario they believe the behavior was more immoral.

(NOTE: Most people concur that the behavior in the Vintage Sedan is far more immoral, and to a certain extent, the discussion questions that follow presuppose that the class shares that sentiment. If they’re ambivalent, shift on the fly.)

THE VINTAGE SEDAN. Not truly rich, your one luxury in life is a vintage Mercedes sedan that, with much time, attention and money, you've restored to mint condition. In particular, you're pleased by the auto's fine leather seating. One day, you stop at the intersection of two small country roads, both lightly traveled. Hearing a voice screaming for help, you get out and see a man who's wounded and covered with a lot of his blood. Assuring you that his wound's confined to one of his legs, the man also informs you that he was a medical student for two full years. And, despite his expulsion for cheating on his second year final exams, which explains his indigent status since, he's knowledgeably tied his shirt near the wound so as to stop the flow. So, there's no urgent danger of losing his life, you're informed, but there's great danger of losing his limb. This can be prevented, however, if you drive him to a rural hospital fifty miles away. "How did the wound occur?" you ask. An avid bird-watcher, he admits that he trespassed on a nearby field and, in carelessly leaving, cut himself on rusty barbed wire. Now, if you aid this trespasser, you must lay him across your fine back seat. But, then, your fine upholstery will be soaked through with blood, and restoring the car will cost over five thousand dollars. So, you drive away. Picked up the next day by another driver, he survives but loses the wounded leg.

THE ENVELOPE. In your mailbox, there's something from (the U.S. Committee for) UNICEF. After reading it through, you cor-

rectly believe that, unless you soon send in a check for \$100, then, instead of living many more years, over thirty more children will die soon. But, you throw the material in your trash basket, including the convenient return envelope provided, you send nothing, and, instead of living many more years, over thirty more children die soon than would have had you sent in the requested \$100.

2. DISCUSSION QUESTIONS:

What are the differences between the two scenarios? Specifically...

- What's the imposed cost in the Vintage Sedan? (\$5,000) What's the imposed cost in the Envelope? (\$100)
- How many people suffer in the Vintage Sedan? (1) How many people suffer in the Envelope? (30)
- What's the greatest potential loss in the Vintage Sedan? (A leg) What's the greatest potential loss in the Envelope? (Thirty lives)
- Who is responsible for the situation in the Vintage Sedan? (The victim himself is responsible – he was trespassing and breaking the law. In addition, the only other thing we know about him is that he was thrown out of medical school for cheating.) Who is responsible for the situation in the Envelope? (No one is responsible – the children are victims of an accident of birth.)

Given these differences and what seems to be a clear moral disparity between the scenarios, what explains our willingness to be more forgiving of the behavior in

the Envelope and more critical of the behavior in the Vintage Sedan?

- *Physical Proximity.* In the Vintage Sedan, the victim is right in front of us. In the Envelope, the victims are half a world away.

- *Social Proximity.* In the Vintage Sedan, people tend to picture someone who looks like them, whether in terms of race, class, or ethnicity. In the Envelope, people often imagine victims who are very different from themselves.

- *Disastrous Further Future.* Many people argue that saving children's lives in the short term in the Envelope will only result in greater population growth which will lead to greater famine in the future.

- *Collective Responsibility.* In the case of the Envelope, there's the feeling that many people have received identical envelopes and so the responsibility to act is spread broadly. Under these circumstances, a particular individual's decision not to act seems less morally culpable. This effect is similar to the explanation for America's dismal voting rate: "I'm just one person – my vote won't matter so why bother voting?" In the case of the Vintage Sedan, the individual in question is the only one who can act and so bears sole moral responsibility.

- *Heroism Complex.* In the Vintage Sedan, there's an immediate and direct feeling of performing the heroic. The circumstances of the Envelope make the heroic sense far more tenuous.

- *Emergencies vs. Chronic Horrors.* You just have to watch the evening news to recognize that we tend to respond far more urgently to emergencies (e.g. fires, burglaries, etc.) than we do to chronic horrors (e.g. famine, poverty, etc.). The Vintage Sedan is a limited scenario, with a straightforward resolution. The Envelope has no such tidiness. It is difficult to continue to muster a compassionate response in the face of what seems to be endless suffering.

- *The Continuing Mess and the Cleaned Scene.* If you take action in the Vintage Sedan, the problem is solved. In the Envelope, on the other hand, you save thirty lives but the underlying problem of famine and grinding poverty still exists. This inability to really solve the problem makes the Envelope case seem much more hopeless and more conducive to paralyzed inaction.

Students should be encouraged to identify as many reasons as they can for the difference in our response to these situations. Clearly, many of these are quite subtle and may be more appropriate for older students. In any case, the scenarios can lead to an interesting discussion about the nature of our impulses to help one another.



TZEDAKAH IN JEWISH TEXT AND TRADITION

TZEDAKAH BOX MAKING

MAKING *TZEDAKAH* BOXES is a great way to introduce a creative component into the *Tzedakah in Action* curriculum. Students can make *tzedakah* boxes for themselves and use the opportunity to broach the subject of *tzedakah* with their families. A more ambitious project might involve having students make individual *tzedakah* boxes for students in another class. This would provide an opportunity for *Tzedakah in Action* students to teach other young people about the value of *tzedakah*. If you decide to incorporate this activity into your curriculum, take some time to expose your students to a range of artistic *tzedakah* boxes. You'll be able to find examples in many places, from the internet to your synagogue gift shop. Following are several *tzedakah* box art project suggestions.

Chinese Food Take-Out Boxes

Not only are these inexpensive and readily available, they provide an opportunity for another practical *tzedakah* lesson. As students are painting, coloring, or otherwise decorating their boxes, ask them if they ever have their restaurant leftovers packed up for them to take home. This conversation can lead in several different directions:

I. At the most basic level, you can simply encourage students always to have their leftovers packed up so they can give them to homeless people on the street on

their way home. It's fun to call this a "homework assignment for the rest of your life" and to encourage students to discuss it with their parents and be prepared to talk about their conversations during the next class session.

2. On a much deeper level, this exercise can lead into a discussion of Judaism's perspective on beggars. See p.36 for an activity that deals with this subject.

3. Finally, this can lead to a discussion about how leftovers at synagogue, school, and family functions are used. You can brainstorm ways to avoid wasting food, invite a member of the staff to come in to address this question, and make it a class project to distribute information about places in the community that accept leftover food.

Stained Glass

For these *tzedakah* boxes, you'll need glass jars with lids. Figure out some way to cut coin slots in the lids (depending on the age of the students, this might be a teacher-only operation). To create the stained glass effect, cut or tear small pieces of tissue paper, dip them in a water and white liquid glue (like Elmer's) mixture, and stick them to the outside of the jar, making sure to cover the entire exterior surface.



GIVING WITH DIGNITY

The question of giving with dignity is critical to the success of the program. The following activities help students come to grips with its many dimensions.

Text Study

Give students the following quotations and either discuss them as a class or have them consider the discussion questions in 2-3 person *chevrutah* study groups.

I. Quotations

“There was a secret chamber in the Temple in Jerusalem where people would leave money. But the poor, those in need, could come into the same chamber and take money. No one ever knew who gave – or who took.” (*Mishneh Shekalim 5:6*)¹³

“Rabbi Yannai once saw a person giving money to a poor man in public. He said: ‘It would have been better for you to give him nothing, than giving as you did. You caused him embarrassment.’” (*Chagigah 5a*)¹⁴

2. Discussion Questions

- What are some words/ideas we might associate with each of the quotations?
- What values do you think each of these quotations is trying to teach? Why are these values important?
- What are the problems that arise when you consider the meaning and relevance of each of the quotations?

Film Clips

Many movies represent interactions between the rich and the poor. Selecting clips from some of the following can provoke interesting discussions among students: *Trading Places* (1983), *My Man Godfrey* (1936), *The Fisher King* (1991), *Groundhog Day* (1993), *The Saint of Fort Washington* (1993), and *With Honors* (1994).

Real-Life Kavod

In this exercise, students get a chance to apply the principle of giving with dignity using the concepts of *kavod* (honor) and *bushah* (dishonor). On p.54 you’ll find a worksheet that students can complete and then discuss. Be sure to acknowledge that the initial *kavod-bushah* scoring is fairly subjective and students should be encouraged to debate.



TZEDAKAH GUIDELINES

Rambam’s Ladder

Maimonides encapsulated *tzedakah* principles in an eight-rung ladder rich with pedagogical opportunities. The ladder creates a hierarchy ranking *tzedakah* actions from least honorable to most honorable.

The person who gives reluctantly and with regret.

The person who gives graciously, but less than one should.

The person who gives what one should, but only after being asked.

The person who gives before being asked.

The person who gives without knowing to whom one gives, although the recipient knows the identity of the donor.

The person who gives without making his/her identity known.

The person who gives without knowing to whom he/she gives. The recipient does not know from whom he/she receives.

The person who helps another to support himself/herself by a gift or a loan or by finding employment for that person, thus helping that person to become self-sufficient.

Ordering

Put all eight of the rungs on separate notecards and have students work in small groups to put them in order. Be sure groups can explain their rationale for the order they've chosen. After groups present, lay out the correct order and ask students to reflect on Rambam's choices. (One interesting discussion topic is that there seems to be great value placed on anonymity in Rambam's giving equation. How does that gel with the value of personal connection between giver and recipient that adds so much to the dignity of *tzedakah*?)

Build a Ladder

This is a bit more labor intensive, but it also produces a permanent sculpture that can serve as a focal point for the foundation's activities – you can bring the ladder into the room in which the Board will be meeting in order to symbolically transform the space into a place where *tzedakah* work is done. The easiest way to build the ladder is to divide into eight small groups and give each a piece of wood (whitewashed 1x4) and the text of one of Rambam's steps and have them paint or decorate their "rung" to represent that step. Then attach the rungs to two longer boards to create a ladder.

Donor Ranking

In this exercise, students get to use what they've learned about Rambam's ladder to evaluate different kinds of giving. Give each student (or small group) a copy of the Donor List and the Donor Scorecard (see pp.56-57 for copyable worksheets). Ask them to read through the profiles and come to consensus on where each donor falls on Rambam's ladder.

Role Play

Divide students into small groups and assign each group a rung from Rambam's ladder. Have each group prepare a short skit that encapsulates the theme of each rung and have the rest of the class try to identify which rung is being portrayed.

Judaism and Beggars

Arthur Kurzweil wrote an outstanding essay on this subject (you can find it in Danny Siegel's book, *Gym Shoes and Irises*). Kurzweil felt extremely uncomfortable about his reactions to people on the street who ask him for money. He identified fifteen questions that he struggles to answer (e.g. "What if they are fakes or frauds?" and "What if I have no money on me, or no spare change?").

Looking for guidance, he searched through the *Talmud* to determine how Jewish law would answer these questions. In the broadest sense, his journey is a remarkable application of Jewish law to a contemporary social policy problem. For the specific purpose of *Tzedakah in Action*, it presents a great source for discussion about panhandling and *tzedakah*. (It's an especially nice match for the Chinese Food Take-Out *Tzedakah* Box art project mentioned on p.33.) In addition to simply reading and discussing the essay, older students might want to use it to craft a "recommended policy" or brochure for the community on Jewish responses to beggars.

You could also design a survey based on the questions Kurzweil raises and have students consider them individually before exploring the Talmudic perspectives.



PHILANTHROPY

BECAUSE *TZEDAKAH IN ACTION* blends Jewish teaching on *tzedakah* with modern philanthropic practice, students need to be exposed to the world of philanthropy. These activities will help them translate their knowledge of *tzedakah* into the foundation context.

PHILANTHROPY IS...

Ask students to brainstorm definitions for "philanthropy." Try to create a working definition for class. Feel free to throw in a dictionary definition or Bob Payton's definition, "private action for the public good" (see p.73).

Based on your definition, ask students to list some philanthropic organizations. Encourage them to think broadly about the different kinds of organizations that fall under this rubric. Once you've generated a large list, divide into small groups and ask each group to develop a taxonomy of philanthropic organizations. What categories can we use to organize all of these organizations? Size? Mission (e.g. education, direct service, organizing, advocacy, etc.)? Geographic area of operation (e.g. local, regional, national, international)? Project focus (e.g. environmental, health, education, poverty, etc.)? Ultimately, the class should collectively develop a language and a set of questions they can use to help them define and understand the work of any particular philanthropic organization.

Ask students to think about the needs present in their community: Are there

hungry people? Are there stray animals? Is there discrimination? Then see if the class can collectively identify an organization whose mission is to address that need. This process should help students develop a better understanding of what is meant by the philanthropic or non-profit or third sector.

The Minnesota Council on Foundations produced a short film called “Philanthropy Is...” that depicts everyday people responding to the question, “What is philanthropy?” Their answers and interpretations are both funny and poignant and the film can serve as a good introduction to this discussion.¹⁵



PHILANTHROPY IN THE NEWS

This activity encourages student awareness of philanthropy in the news. Students will read (or see on television news) stories about philanthropy and then answer a series of questions about the story. If assigned as homework, students can be asked to find their own stories. In class, you may want to provide some articles having to do with philanthropy. Questions students should answer include:

- Who is being helped?
- Who is doing the helping?
- What need is being met?
- Why is it necessary?
- How is the project being accomplished?



INDEPENDENT STUDY

In this activity, individual students or small groups are assigned a philanthropic organization to look up on-line. Based on the research, each student or group can form a detailed picture of the organization, including information about its mission statement, goals, history, activities, and area of operation. Each student or group can produce a poster or brief oral report presenting this information to the class or to the larger community, including ways to donate money to and/or volunteer for each organization.



BRAINSTORMING AND DECISION-MAKING

BRAINSTORMING

AS IN NEARLY every creative group undertaking, brainstorming will play a central role, especially in the formative issue selection process. Teaching brainstorming skills is a crucial part of the process and will provide an opportunity to emphasize the importance of mutual respect and active listening in discussion and deliberation.

It is therefore crucial that students have an opportunity to practice the skills of respectful brainstorming before using those skills as Trustees. Once guidelines have been developed, use brainstorming frequently to give students practice. This can be done as part of a game (e.g. a Sing Down) or in the

process of making class decisions or planning class activities. The guidelines listed below are a good baseline set for any group.

- **Do not allow commentary.** (Not even “good idea.” Those participants who don’t get as many positive comments may feel left out.)

- **Only one person speaks at a time and only on the matter at hand.**

- **All ideas are welcome.** (This includes silly ideas. They may spark a good idea in someone else.)

- **Avoid self-censure.** (This is the greatest barrier to effective brainstorming. Even if you don’t think it’s a “good” idea, say it anyway. It may stimulate someone else’s thinking and/or be modifiable with someone else’s perspective.)

- **Leave reality for later.**



THE MAYSPORE REPAIR COMPANY¹⁶

THIS ROLE-PLAYING exercise helps students practice brainstorming and explore their ability to advocate for their own interests while maintaining a sense of the overall well-being of a group. Divide the class into small groups of 6-7 students (the role of Observer is optional – you can ask all students to pay attention to these things). Give each participant a role (you’ll find these at the end of the chapter on p.58), and a few minutes to read through the scenario and their role and ask questions. Then give each group 15-20 minutes to work out a solution

to the problem. Let them know that they’ll be asked to share their solutions with the entire class as well as talk about the way they made the decision. Make sure students understand that there is no right answer and that the objective is to agree collectively on the fairest way to allocate the new truck.

Suggestions for Debriefing

Concerning the Simulation

- Who got the truck and why did that person get it?
- How did you arrive at your decision and what factors went into the decision?
- What roles did each member of the group play (e.g. leader, peace-maker, etc.)?

Concerning the Process (If you have an Observer, pose these questions first to that person and then ask the other participants to react/comment.)

- What steps were taken in the decision-making process?
- Was a systematic method used to solve the problem?
- When tentative solutions were first posed, was there any consensus? Was the consensus maintained and/or how did it evolve?
- What conflicts (if any) arose in your group?
- Did any of the participants compromise? If so, how and why did they do so?
- What alternatives were considered before you reached your final decision?

- Did your group come up with a general principle for new truck distribution that could be applied the next time this situation arises?

Concerning the Participants

- What role did you find yourself playing in the exercise (e.g. leader, follower, compromiser, peacemaker, consensus-builder, problem-solver, etc.)?
- Have you ever found yourself in a similar decision-making situation in real life?
 - How did you feel as a participant?
 - How did you feel about and/or react to the other participants?

Application

- What did you learn about decision-making in general from the exercise?
- What insight did you gain about your own role in groups as a result of the exercise?
- What might you change about the role you play in groups based on what you learned?
- How might you apply the lessons you learned from this exercise to our work in *Tzedakah in Action*?



THE WORK OF *TZEDAKAH IN ACTION*

HOW *TZEDAKAH IN ACTION* WORKS?

Photocopy page 85, “How *Tzedakah in Action* Works,” onto an overhead projector transparency and use it to illustrate how foundations in general, and *Tzedakah in Action* in particular, fit into the philanthropic landscape in America. (If you don’t have access to an overhead projector, you can draw the picture on the board or photocopy this page for students.)



CONFLICT OF INTEREST

“Conflict of interest” happens when a person’s private interests come into conflict with his or her official responsibilities. Given the American Jewish community’s significant level of involvement in the non-profit world, it is inevitable that a conflict of interest problem will arise (in Temple Isaiah’s Seventh Grade Fund, it happened the first year). One likely scenario is that a student’s parent will want to submit a proposal for an organization for which he or she works or serves on the Board. Conflict of interest raises deep ethical considerations, so discuss it explicitly before it comes up during the grant cycle. You may also want to broach the subject with the leadership of your institution to determine if there are guidelines on how to handle a conflict of interest. The following discussion questions should tease out many of the problems your students will face and help them consider possible responses.

Discussion

What's the problem here? Does this constitute a "conflict of interest"? Why or why not? If it does, how should the Board deal with it?

1. An organization making a presentation for the Board passes around pens to each Board Member with the organization's logo on them as a gift so that Board members will remember the organization.

2. A student's mother is the Executive Director of an organization that submits a grant proposal.

3. An organization requesting a grant offers to use some of the money to have a plaque made that will thank your foundation for its support. (Does your opinion change if the organization won't be using grant money for the plaque?)



FOUNDATION SIMULATION

IN ORDER TO put all of the pieces together, students will be given an opportunity to experience a practice simulation of the actual grant cycle. Following this explanation, you'll find four 1-2 page grant proposals on the issue of medical research and treatment. These are actual proposals that were submitted to Temple Isaiah's Seventh Grade Fund in 1999 and 2000. All of them were awarded grants by the Seventh Grade

Fund. Divide students into small groups of 4-6. Give each group an Evaluation Form (p.50), Proposal Evaluation Guidelines (p.49), Proposal Decision Form (p.51), and copies of the four proposals. After the simulation, bring groups back together and have them present their decisions and rationales. The following questions can stimulate further discussion:

- What emotional appeals did each organization use to elicit your support?
- How many people are you helping in each case? Can you estimate a per person cost of each project?
- How does each project represent giving with dignity?
- Where would this project fall on Rambam's Ladder of *Tzedakah*?
- What process did your group use to make the decision?
- What role did each member of the group take in the process? Did all participants feel like they were equal partners in the decision? If not, what could you do next time to make sure this happens?
- What lessons can we learn from this experience that will help us be more successful when we're evaluating real proposals?



American Heart Association

OPERATION HEARTBEAT

What is the American Heart Association?

The American Heart Association (AHA) is a nonprofit, voluntary health organization funded by private contributions. Its mission is to reduce disability and death from cardiovascular diseases and stroke through research and prevention. To support this mission, the AHA has contributed about \$1 billion to cardiovascular research over the last 12 years. AHA-funded research has yielded many important discoveries: CPR, life-extending drugs, bypass surgery, pacemakers and special surgical techniques to repair heart defects. Three Nobel prizes have been awarded to researchers funded by the AHA.

Operation Heartbeat combines the knowledge gained from years of research with technological advances in a program that saves the lives of sudden cardiac arrest victims. **Anyone can be a victim of sudden cardiac arrest – regardless of age or apparent health.** They could be a victim of choking, drowning, or an auto accident.

Project and Description

Operation Heartbeat is all about strengthening the *Chain of Survival* for sudden cardiac arrest victims. Surviving cardiac arrest depends on a series of steps. Of these, the most critical is rapid defibrillation. Unfortunately, too much time often elapses between “calling 911” and defibrillating a patient. While communities around the country have installed 911 systems, provided emergency vehicles and personnel, many more defibrillators are needed.

Project Budget and Request

We are requesting funds to purchase one Automatic External Defibrillator (AED) to be placed in our community, and to train those who will use it.

▶ Purchase of AED	\$3,000
▶ Training	<u>\$2,000</u>
▶ Total cost	\$5,000

Even a single AED placed in our community will help save lives. Nationally, about 50% of ambulances and a smaller percentage of fire department vehicles used for emergencies have portable external defibrillators. That’s way too low. As Dr. Joseph P. Ornato of the Medical College of Virginia said in a New York Times article, “Sending an emergency vehicle to a cardiac arrest without a defibrillator is like having policemen with guns but no bullets.”

Program Activities

Operation Heartbeat is a program that the AHA began in late 1999 to strengthen each link in the chain of survival. The placement of AEDs and training those who use them are two very important activities of this program.

About AEDs

An AED is a portable and fully self contained defibrillator unit that, when put into use by a trained citizen or EMS personnel, monitors a patient’s heart rhythm and advises a defibrillating shock (when needed) to return the heart to a more normalized rhythm. AEDs were developed in the 1980s after advances in solid-state circuitry and microcomputers allowed defibrillators to recognize the heart rhythm known as Ventricular Fibrillation

(VF). These AEDs were the first to identify this irregular heart rhythm, advise the operator that a shock was indicated, and deliver the shock.

However, AEDs have not been deployed widely to many groups of emergency responders. The barriers have been cost, size, maintenance needs and integration into existing EMS (Emergency Medical Service) systems. Recent breakthroughs in technology mean that AEDs are now:

- ✓ Easier to use and maintain.
- ✓ Smaller, lightweight and rugged.
- ✓ Lower in cost.

The new generation of AEDs makes it more practical to train and equip a wider range of responders, including fire department personnel, police officers, lifeguards, flight attendants, security guards and others responsible for public safety. “Anyone who can learn CPR can learn to use AEDs,” says Dr. Richard Cummins, a pioneer in the treatment of out-of-hospital sudden cardiac arrest.

About the Training

It is not enough to simply purchase and place an AED in our community. It is just as important to train those who will most likely be using them. The AHA staff members who direct the activities of the *Operation Heartbeat* program work closely with a wide variety of organizations and community groups to ensure that each time an AED is purchased and placed in our community, appropriate training goes with the placement.

Project Goals

The over-riding goal of *Operation Heartbeat* is quite simply to save lives. We will reach our goal one step at a time. By working with groups like *Tzedakah in Action*, our hope is to work toward Public Access Defibrillation.

This means that the general public will have access to defibrillators in highly populated areas such as office buildings, stadiums and airplanes, where survival rates from sudden cardiac arrest are less than 1%.

Timeline

Both AED and the training to use them are available now. Therefore the purchase and placement of an AED in our community, and training those who will use it could happen as soon as funds are available.

Consistency with the Goals of Tzedakah in Action

As a voluntary health organization funded by private contributions, the AHA understands the value of working with others in our community toward positive change. On receiving the Request for Proposals from your organization, we were both honored and humbled by your commitment to our community. We believe that participation in *Operation Heartbeat* offers a unique opportunity for *Tzedakah in Action* in furthering that commitment.

Moreover, it is an opportunity to make a lasting impact on the community. It is our hope that after reviewing this proposal, you will share our excitement and accept our invitation to join us in our fight to save lives.

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Make-A-Wish Foundation

I. Description of our organization:

The Greater Bay Area Make-A-Wish Foundation® is a charitable non-profit organization whose purpose is to grant wishes to children with terminal or life-threatening illness. Proceeds from the Make-A-Wish fundraising efforts are used to fulfill children's dreams and create magical memories for the entire family.

2. We would love to have *Tzedakah in Action* adopt its very own wish. This means the proceeds would pay for a "wishkid" to have their wish granted. The class would get to hear all about the wishchild and what happened on the wish that they made possible.
3. The wish we are asking the class to adopt will cost the foundation \$5,000. It is important to understand that we send the wishchild and their entire family on the wish and this amount would pay for everything!
4. The donation will enable one of our wish children to go on a dream vacation! Their entire family will take an airplane ride to beautiful Hawaii where they will swim, sightsee and stay in a beautiful hotel overlooking the ocean!
5. The Greater Bay Area Make-A-Wish Foundation® serves children between the ages of 2½ and 18 who meet our guidelines without regard to race, gender, creed, socio-economic, or cultural background. The foundation is committed to ensuring that it never has to decline a qualified wish referral nor limit the scope of a child's imagination for his/her wish due to lack of funds.
6. This year we will be meeting a lot of kids

who are very sick and have to spend time in the hospital, at their doctors office, and at home in bed instead of being able to play with their friends and brothers and sisters. The money you send to Make-A-Wish will help them get a wish!!! We meet these special boys and girls and ask them: if you could go anywhere, if you could meet anyone, if you could have anything, or if you could be anything, what would your wish be? Their eyes light up and they tell me what their secret wish is. You would be amazed at what some of these kids wish for. This year we sent kids to Disneyland and Disney World, England, Rome, Australia and all over the world! We brought some boys and girls to meet Michael Jordan, Steve Young, Robin Williams, Barney and lots of other movie stars. Some kids wish to go on shopping sprees to buy whatever they want and we even pick them up in limousines! You see, this is a time for them to have a wish come true and forget about being sick for a while.

7. Wishes are happening on almost a daily basis. Right now there are wishes happening all over the United States.
8. We only grant wishes to children between the ages of 2½ and 18 years of age, and we always include their family in the wish!
9. Families are asked to call us, share pictures with us and let us know how their wish was!
10. We do wishes all year long and it is our goal never to say no to a wish because we do not have the money to do it. So far we have never had to say no!

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San Francisco Community Clinic Consortium

IT IS WITH great honor that we submit this application to your class, knowing that the desire to help the underserved populations of San Francisco can be communicated to those who may be able to, one day, make a difference. By saying, “underserved” we are describing a population of San Francisco that routinely is overlooked in relation to how human services are provided. Street Outreach Services (SOS), as a program of SFCCC, seeks to provide health care services to the homeless.

I. Description of our organization:

Founded in 1982, the San Francisco Community Clinic Consortium (SFCCC) exists to develop and implement programs as well as support policies that increase access to community-based primary health care for the medically underserved populations of San Francisco. Together with our member clinics we provide services to over 65,000 patients each year. SFCCC works to fulfill its purpose by pursuing the following four goals:

- Expanding the delivery of primary health care services through projects as well as services administered directly by SFCCC in contrast with its partner health centers.
- Supporting our member health centers in their provision of quality, cost-effective healthcare services, thereby enhancing the San Francisco healthcare safety net.
- Strengthening our partners’ networks by improving the process for accessing healthcare.
- Providing leadership in health policy.

For decades the Consortium’s family-focused clinics have provided affordable, culturally and linguistically competent health care services for those most at-risk of poor health, and with the least ability to pay. In 1982, the executive directors of these clinics formed the Consortium as a leadership organization to preserve the role of community clinics as providers of health care offering a safety net in a new era of increasing health care costs and diminishing public funding.

As a recipient of the Primary Care Achievement Award for Excellence in Patient Care in 1996 (an award funded by the Pew Charitable Trusts), the Consortium was distinguished for providing direct services as well as managing innumerable grant projects for our partner clinics.

2. Title of project and brief description:

The title of our project is called Street Outreach Services (SOS). SOS has been created to respond to the lack of health care for the homeless and, the obstacles to quality health care they routinely face. Crowded living conditions in shelters and often unsanitary conditions of living outdoors increase the risk of unhealthy conditions leading to the spread of tuberculosis, respiratory infections, influenza, lice, scabies, and skin diseases. Resources for wound care and respite care are scarce. Adding to this mix is the fact that homeless people are often exposed to physical violence and sexual assault. Tasks that most people take for granted such as personal hygiene, showers,

mouth and teeth care, and wearing clean clothes are difficult for people living on the streets.

Most homeless people do not have adequate nutrition, and special diets for conditions such as diabetes or heart disease are very difficult to maintain. Homeless women are further at high risk for unplanned pregnancy and undiagnosed/ untreated medical conditions such as urinary tract infections, breast and cervical cancer, HIV/AIDS and sexually transmitted diseases. The key to the program's success is consistency and building trusting relationships with clients – elements that have earned SOS its national recognition on CNN, as well as in the San Francisco Examiner.

3. Complete and detailed project budget and amount of request: We are requesting a grant of \$5,000 for our SOS program. A detailed budget is added to this request as an attachment.

4. Specific activities this grant will support: Funds will be used to support SOS as it provides outreach, primary care, and services supporting case by case management of individual needs. Materials supporting good hygiene, socks, and blankets, all of which help to promote a clients' health with establishing good understanding between staff and SOS clients, are routinely purchased from SOS funds. This is to help build a bridge of trust between the client and SOS staff.

Once trust is established, clients are more likely to ask for assistance with their medical and psychological and social problems, and be receptive to information about social services and health education messages. HIV and health education services are also provided at no cost to the SOS client. SOS also assists clients in accessing needed psychological and social services, such as shelter and housing, food, benefits counseling, legal assistance, and substance abuse and mental health treatment. The patient population consists of low-income people who are experiencing extreme poverty and homelessness.

Our patients represent a diverse cross-section of society that spans the realms of race, color, gender, age, sexual orientation, nationality, religion, and physical/mental ability. Current clients included veterans, recent immigrants, people living in cars, as well as people suffering from mental illness and drug addiction disorders.

5. Specific goals and objectives:

- Provide clients with preventive and urgent care in non-traditional settings.
- Match up clients with community-based primary care doctors who are conveniently located, and culturally and linguistically appropriate.
- Empower clients to take responsibility for individual health care and related needs.
- Make referrals to, advocate for, and coordinate care with other agencies and services.

MEASURABLE OUTCOMES

TOTALS

CLIENTS RECEIVING MED SERVICES	1,400
NUMBER OF MEDICAL ENCOUNTERS	900
CASE MANAGEMENT ENCOUNTERS	500
CLIENTS SEEN	3,000
TOTAL ENCOUNTERS (INVOLVES THE DISTRIBUTION OF SUPPLIES AND EDUCATIONAL MATERIAL)	18,000

Currently serving to the limit of its ability, SOS exists with the help of funds received through money provided by the federal government in Washington D.C. Covering less than two-thirds of the total SOS budget of \$247,066, the Consortium must raise approximately \$70,000 in private matching funds to continue providing the services of SOS. Funds received support outreach staff, the recruitment and training of medical volunteers, and essential supplies as well as expected increases in services due to expected increases in populations served by SOS.

We appreciate your class taking the time to consider our proposal. Please call us if you would like any additional information or have any questions. Thank you for your consideration.

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The Susan G. Komen Breast Cancer Foundation

Tzedakah in Action Grant Request

Executive Summary

The Susan G. Komen Breast Cancer Foundation was established in 1982 by Nancy Brinker to honor the memory of her sister, Susan G. Komen, who died from breast cancer at the age of 36. During the 1990s, approximately 1.8 million women and 12,000 men were diagnosed with invasive breast cancer. Approximately 40,800 women and 400 men will die of the disease this year. However, strides are being made to increase the awareness of early detection, discover what causes breast cancer and then effectively treat it. But there is still much more that needs to be accomplished and that's where we need your help.

The Komen Foundation is an international organization with a network of over 40,000 volunteers working through Affiliates across the country and abroad, fighting to eradicate breast cancer as a life-threatening disease by advancing research, education, screening and treatment. The Foundation respectfully requests a grant of \$3,000 from *Tzedakah in Action* to join us in our efforts to fund breast cancer research through our International Grant Program.

International Grant Program

A gift of \$3,000 from *Tzedakah in Action* will enable the Komen Foundation to fund important breast cancer research. The Komen Foundation is regarded as the most

innovative and responsive grant program in breast cancer today. As a pioneer in the funding of groundbreaking breast cancer research, the Komen Foundation is often the only source of funding for cutting-edge research, much of which has led to landmark discoveries in the quest to find a cure for and eventually prevent breast cancer.

Komen's International Grant Program has provided funding for basic, clinical and translational breast cancer research for the last eighteen years. Through Komen's blind, or anonymous peer review process, which is recognized by the National Cancer Institute as exemplary, research projects are chosen for funding. There are two different types of grants we offer:

- Postdoctoral Fellowship Grants
- Principal Investigator Grants

Postdoctoral Fellowship Grants

Research is a building process, scientists building upon the discoveries and work of other scientists in the field. When Nancy Brinker founded Komen there were very few scientists dedicating their careers to breast cancer research, due to lack of private and federal funding. Komen decided that support was needed early in a scientist's career and consequently, Komen began funding Postdoctoral Fellowship grants.

Komen awards Postdoctoral Fellowship grants annually, for breast cancer research, to qualified applicants with M.D. or Ph.D. degrees. Each fellowship is for three years and extends to an experienced scientist ("Principal Investigator") the opportunity to

select a scientist ("Fellow") to train in his/her laboratory. The annual award is \$35,000, for a total of \$105,000 per grant. The recipients must fulfill all reporting and other obligations outlined in his/her grant contract in order to receive the award each year.

Principal Investigator Grants

This program is intended to foster investigations into the cause, treatment, prevention and cure of breast cancers. Particular emphasis is given to projects that are innovative, non-duplicative of other efforts and have the potential to lay the groundwork for continuing study. The program offers grants of up to \$250,000 over a two-year period.

Good Stewards of Your Money

The Komen Foundation operates with a small staff and a large volunteer network. We are careful in our spending, realizing that our supporters expect their money to be dedicated to fulfilling our mission in eradicating breast cancer as a life-threatening disease. Our general and administrative expenses are below 10%.

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INSTRUCTIONS FOR FOUNDATION SIMULATION

YOU ARE THE Board of Trustees of a foundation called *Tzedakah in Action*. This year, the foundation has chosen “medical research and treatment” as its issue. During today’s meeting, you’ll be reviewing four proposals from organizations dedicated to medical research and treatment.

The organizations are asking for a total of \$18,000, but *Tzedakah in Action* has only \$9,000 to distribute. As a Board, you have to decide which organizations should receive funding and whether or not they should receive their full requests. You must be able to explain why you are funding certain organizations and why you are not funding others.

Read each proposal and take five minutes to discuss it as a group. You should use the “Proposal Evaluation Form” to write comments about each proposal. The group should give each proposal a letter grade of A, B, C, D, or F. After you have read all of the proposals, use the “Proposal Decision Form” to indicate what action you’ll be taking on each proposal, why you made these decisions, and how much money you are giving to each organization you decided to fund.

Each group needs to select a group leader who should run the meeting and a recorder who should keep notes on your discussions.

PROPOSAL EVALUATION GUIDELINES

ORGANIZATION

What's the name of the organization?

AMOUNT

How much is the grant request?

PROJECT & DESCRIPTION

What is the specific name and nature of the project we're being asked to fund?

What specifically will the project do?

NEED & IMPORTANCE

Do you believe that there is a need for this project? How important is the issue or problem that this project addresses? Does it fit our issue area and our grant guidelines?

GOALS & OBJECTIVES

What are the goals and objectives of this project? Are they clear? Do you understand the purpose of this project? Will the success or failure of the project be measurable?

EFFECTIVENESS

Do you believe that this project will be effective in addressing the problem or need mentioned above? How effective will it be?

JEWISH VALUES

How well does this project fulfill the Jewish values of *tzedakah* that we've been studying? Do you get the impression that this organization gives with dignity?

BUDGET

Will our grant partially or fully fund the project? How will the money be spent? Do you believe that this is a good use of the money? How much of the grant request will go to direct services vs. operations?

QUESTIONS, COMMENTS & IDEAS

Are there any questions you feel are left unanswered by the grant proposal? What question or questions would you ask if this organization came to make a presentation?

OVERALL GRADE

Based on your answers to the questions above, what overall letter grade would you give to this proposal?

PROPOSAL EVALUATION FORM²³

ORGANIZATION	AHA	Make-A-Wish	SFCCC	Komen
AMOUNT	\$5,000	\$5,000	\$5,000	\$3,000
PROJECT NAME & DESCRIPTION	Operation Heartbeat	One "Wish"	Street Outreach Services	Research Grants
NEED & IMPORTANCE				
GOALS & OBJECTIVES				
EFFECTIVENESS				
JEWISH VALUES				
BUDGET				
QUESTIONS, COMMENTS, & IDEAS				
OVERALL GRADE				

PROPOSAL DECISION FORM

ORGANIZATION	ACTION (FUND/DECLINE)	AMOUNT	WHY?
American Heart Association			
Greater Bay Area Make-A-Wish Foundation			
San Francisco Community Clinic Consortium			
The Susan G. Komen Breast Cancer Foundation			

HOW HAVE YOU HELPED OTHERS?

	AN INDIVIDUAL	AN ANIMAL	A FAMILY	MY SCHOOL	THE ENVIRONMENT	AN ORGANIZATION THAT HELPS PEOPLE, ANIMALS, OR THE EARTH
I HELPED						
MY FRIENDS AND I HELPED						
MY FAMILY HELPED						
MY YOUTH GROUP HELPED						
MY SCHOOL GROUP HELPED						

HOW HAVE OTHERS HELPED YOU?

	ME	MY FRIENDS AND ME	MY FAMILY	MY SYNAGOGUE	MY SCHOOL	MY NEIGHBORHOOD OR COMMUNITY
AN INDIVIDUAL HELPED						
AN ANIMAL HELPED						
A FAMILY HELPED						
A SYNAGOGUE OR CHURCH GROUP HELPED						
A SCHOOL GROUP HELPED						
AN ORGANIZATION HELPED						

REAL LIFE KAVOD

Rank each act of tzedakah on the Kavod-Bushab scale. Then match each act with one of the Jewish quotations on the back of the page.

1. ____ Robert belonged to the local Rotary Club. He also had a small business in town. His business had a lot of little troubles: some theft, bad economy, some people who hadn't paid their bills. He was close to going bankrupt and having to leave town. At a Rotary Club Luncheon, Frank, who was sitting next to Robert, stood up and told Robert's story. He suggested, "We should all take up a collection for Robert – he's been good to all of us." They raised over \$7,000.

Kavod 1 2 3 4 5 Bushab

2. ____ Leslie was out collecting money for a charitable organization. She was working her way through an apartment building. She knew that Russell lived on the next floor. Russell was in her class and always dressed in clean but tattered clothes. She had heard from some of her classmates that Russell and his family lived on welfare money. When she got to Russell's door, she rang the bell and asked him if his mother was home. Then she asked her for a donation.

Kavod 1 2 3 4 5 Bushab

3. ____ Mr. Keltzman was a nice old gentleman who lived down the street. He was poor and lived on a pension. He didn't always have quite enough to eat. But he kept his house in perfect order, and always dressed nicely. Even though his suits were old, he always pressed them and placed a handkerchief in his pocket. Some of the people on the block took up a secret collection to help Mr. Keltzman. They gave the money to David and told him to "buy the old man some food." David used the money to buy Mr. Keltzman a new pair of shoes.

Kavod 1 2 3 4 5 Bushab

4. ____ Mr. Cohen was rich. Mr. Kaufman was poor. One day, Mr. Kaufman borrowed \$25 from Mr. Cohen. Months went by and Mr. Kaufman never seemed to have the money to pay it back. He came up with a lot of excuses – a forgotten wallet, a bad week, the kids needed new shoes, etc. Mr. Cohen did not need the \$25. One day, however, he mailed a note to Mr. Kaufman. It said, "Next time you mow your lawn, if I find mine done, too, we'll call it even." Mr. Cohen then instructed his gardener not to mow the lawn that week.

Kavod 1 2 3 4 5 Bushab

5. ____ Irv Brentwood liked to help people. One day, when invited to an event to raise money for a good cause, he made a big pledge. The cause was one he really believed in, but he pledged more than he could afford. Irv made good on the pledge, but took months to pay off his dentist, his butcher, and many other people he owed.

Kavod 1 2 3 4 5 Bushab

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REAL LIFE KAVOD

A.

Even persons living on *tzedakah* are obligated to give part of their money to *tzedakah*.

–*Gittin 7b*

B.

The highest degree of *tzedakah* is to aid someone by offering him/her a gift or a loan, by entering into a partnership with him/her, or by providing work so that he/she can become self-supporting.

–*Mishneh Torah*

C.

When *tzedakah* collectors would see Eleazer of Bartota, they would hide from him, because he would give away all that he had with him. He was once on his way to the market to purchase something for his daughter's wedding when the *tzedakah* collectors saw him. They hid from him, but he came running after them.

–*Ta'anit 24a*

D.

It is a *mitzvah* to give a poor person what is needed. If one has no clothing, clothing should be provided. If one has no furniture, it should be obtained... Even if an impoverished person was used to riding on a horse with a servant running ahead, you should provide a horse and servant. It is a *mitzvah* to meet a poor person's needs – but you are not required to make that person rich.

–*Mishneh Torah*

E.

Rabbi Yannai once saw a man give money to a poor man publicly. He said, "It would have been better for you not to have given him anything, rather than giving it to him as you did, causing him embarrassment."

–*Chagigah 5a*

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DONOR LIST

“Mark Millionaire”

Mark has lots of money. He picks out people who he thinks both need and deserve help. Then he changes their lives. He finds them a job, makes a gift of money or in some way sees to it that these people can begin to build a new life for themselves. Mark never lets the individuals he helps know that he was involved. But he keeps a scrapbook of the people he has helped and how their lives have been changed. Outside of these private projects, Mark gives only minor amounts of money to other causes.

“Buddy Blindsight”

Buddy has lots of money, too, but he doesn't want to have anything to do with *tzedakah* (or with most other people). Every year, he takes 10% of his earnings and gives them to his lawyer. The lawyer is instructed to use her own discretion in giving the money away. If someone asks Buddy for a donation or for help, he simply tells them to call his lawyer. This even goes for his family members who have, on occasion, come upon hard times.

“Goody Kaufman”

Goody Kaufman is a housewife. She spends one day a week doing good deeds. Part of the day she works at a soup kitchen; the rest of the day she goes to the hospital and visits people who might have no other visitors. She collects toys and clothes and makes lots of phone calls. She will do anything to help people. But she doesn't like it when people ask

her for money. She won't give a penny to a beggar or to a solicitor or in response to a mail request.

“Tammy Telethon”

Tammy is a successful young accountant. Every time she goes to a store, she puts her spare change into the donation can at the register. She gives a quarter to every beggar who asks. She sends \$10-\$25 in response to every solicitation she receives in the mail, and will call and make the same kind of pledge to every charity telethon. Tammy is always glad to give. In total, these donations amount to less than 2% of her income.

“Nasty Norman”

Norman hates it when people ask him for money. Here's a typical example of the way he operates: The person from the Jewish Campaign calls and asks him if he would like to give the same pledge he made last year. Norman yells into the phone, “You people are always bothering me! I'm sick of the phone calls and the bleeding heart stories.” Just when the caller is ready to hang up, Norman tells him, “Don't go – you made me feel guilty. I had a good year – increase my pledge by 10%.”

“Sammy Supermarket”

Sammy runs a chain of supermarkets. Many of his markets are in the poor sections of town. In these stores, his prices are often 15%

or 20% higher than in the better parts of town because he knows the people near the stores usually don't have cars and so can't get to any other stores. Sammy sponsors Little League and soccer teams. He is one of the few big business people who work with the local schools to give minority teenagers jobs in his stores. He also started a work-study program for his employees to help them work their way through college.

"Sylvia Scholarship"

Sylvia is an aging widow from a rich and well-known Jewish family. She set up a scholarship fund at a local university. A large amount of money is given annually from this fund in her family name. She knows nothing of the students who receive the money, but each of the

students must do some research into her family's history. This (not need or academic ability) is the single condition of the scholarship. Sylvia wants her family's history preserved.

"Abe and Ruth Chevrah"

Abe and Ruth are a young couple. Abe is a dental hygienist and Ruth is a construction engineer. They belong to their local synagogue and are active in a *chavurah*. Each year the members of the *chavurah* pool all their charitable donations into one fund. The members each give 12% of their income (before taxes) to the fund. Together, the *chavurah* members research various charities and people in need, then meet to allocate their *tzedakah* funds. Abe and Ruth are very active in the group and feel that their participation is their "fair share."

DONOR SCORE GRID

Based on your reading of the Donor List and your understanding of Rambam's ladder of tzedakah, rank the donors in the following categories.

	EFFECTIVENESS	FAIRNESS	KAVOD	FINAL RANK
Mark Millionaire				
Buddy Blindsight				
Goody Kaufman				
Tammy Telethon				
Nasty Norman				
Sammy Supermarket				
Sylvia Scholarship				
Abe & Ruth Chevrah				

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THE MAYSPORE REPAIR COMPANY

THE SCENARIO

Today, the **Maysport Repair Company** received a new Chevrolet truck to add to the existing group of five other small trucks owned by the company. As has been done in the past, the new truck is exchanged for an old truck. Drew Marshall, the foreman, has to decide which of the five drivers should get the truck.

THE FACTS

HERE ARE SOME facts about the trucks and the crew that work with and for Drew Marshall: Most of the crew do all of their driving in the city, but John and Carol cover the jobs in the suburbs.

- **George:** 17 years with the company and has a two-year old Ford truck
- **Leslie:** 11 years with the company and has a five-year old Dodge truck
- **John:** 10 years with the company and has a four-year old Ford truck
- **Carol:** 5 years with the company and has a three-year old Ford truck
- **Lee:** 3 years with the company and has a five-year old Chevrolet truck

YOUR ROLE: DREW MARSHALL

Drew Marshall, Foreman: As the foreman, you have the problem of deciding to which of your crew you should give the new truck. Often there are hard feelings because each member of the crew seems to feel s/he is entitled to the new truck, so you have a tough time being fair. As a matter of fact, it usually turns out that whatever you decide, most of the crew considers it wrong. You now have to face the same issue again because a new truck has been allocated to you for distribution. In order to handle this problem, you have decided to put the decision to the entire crew. You will tell them about the new truck and will put the problem in terms of what would be the fairest way to distribute the truck.

YOUR ROLE: GEORGE

George: You feel you deserve the truck because you have been with the company longer than any of the other workers. Your Ford truck is in excellent shape, and you want to receive the new Chevrolet. You believe that seniority is the only way to determine who gets the truck.

YOUR ROLE: LESLIE

Leslie: You feel you deserve a new truck and it certainly is your turn. Your present truck is old and since the more senior member of the crew has a fairly new truck, you should get the next one. You have taken excellent care of your present Dodge, and have kept it looking like new. A person deserves to be rewarded if s/he treats a company truck like his/her own.

YOUR ROLE: JOHN

John: You have to do more driving than most of the other members of the crew because you work in the suburbs. You have a fairly old truck and you feel you should have the new one because you do so much driving. Besides, Drew's wife is your cousin.

YOUR ROLE: CAROL

Carol: The heater in your present truck is inadequate. Since Lee backed into the door of your truck, it has never been repaired to fit right. The door lets in too much cold air, and you attribute your frequent colds to this. You want to have a warm truck since you have a good deal of driving to do. As long as it has good tires, brakes, and is comfortable, you don't care about its make.

YOUR ROLE: LEE

Lee: You have the poorest truck in the crew. It is five years old and before you got it, it had been in a bad accident. It has never been good and you've put up with it for three years. It's about time you got a good truck to drive, and it seems only fair that the next one should be yours. You have a good driving record. The only accident you had was when you backed into the door of Carol's car when she opened it as you were pulling out of the garage. You hope the new truck is a Ford, since that's your preferred truck.

YOUR ROLE: OBSERVER

Observer: Your task is to observe the activities of the members of your group. You should keep notes about what the group did. Some questions you might consider are:

1. Do you agree or disagree with the group on the person who got the truck?
2. What steps did the group take in deciding who was to get the truck?
3. How did the individuals react to one another in the decision-making process?
4. Was a step-by-step method used to solve the problem?
5. What conflicts came up in the group and how were these conflicts resolved?
6. Did Drew Marshall demonstrate leadership? How?

Endnotes

¹⁰Adapted from Debbie Bertolet and Barbara Jacquette, Youth in Philanthropy Project (ArizonaGIVES/Arizona Community Foundation, 1994) 3.9-3.12.

¹¹Adapted from Debbie Bertolet and Barbara Jacquette, Youth in Philanthropy Project (ArizonaGIVES/Arizona Community Foundation, 1994) 4.6.-4.7.

¹²Activity excerpted and adapted from Peter Unger, *Living High & Letting Die: Our Illusion of Innocence* (New York: Oxford University Press, 1996) 24-25.

¹³Quoted in Joel Lurie Grishaver and Beth Hupp, *Tzedakah, Gemilut Chasadim and Abavah: A Manual for World Repair*, (Denver: Alternatives in Religious Education, Inc., 1983) 12.

¹⁴Quoted in Grishaver 12.

¹⁵You can order the film on videotape from their website at <http://www.mcf.org/mcf/resource/philanth.htm>.

¹⁶Activity excerpted and adapted from Spencer Kagan, *Cooperative Learning by Spencer Kagan* (San Clemente: Kagan Publishing, 1994).

* © Spencer Kagan, *Cooperative Learning by Spencer Kagan* (San Clemente, Kagan Publishing, 1994).

Managing A Grant Cycle



*Happy is the one who uses one's Sechel,
one's God-given powers of judgment,
in performing the Mitzvah of Tzedakah.
— Leviticus Rabbah 34*

AS A TEACHER, the greatest challenge you will face will be finding an appropriate level of involvement in the decision-making process. How will you express your opinions about various proposals? To what extent will you allow the group to learn from its failures or, conversely, assist them in navigating past particular challenges? These are key questions for which there are no definitive answers, though certain issues should be decided before the foundation begins its business.

You should determine as an institution whether there will be limits placed on the directions that the foundation can go. If boundaries are to be placed on students' decision-making powers, they should be disclosed to the Board in advance of any business (e.g. Are you only going to fund Jewish organizations? Are you not going to fund political causes?). Annulment of student decisions once the Board has begun its work undermines the very nature of the process and will alienate students from the seriousness of the undertaking. It may also violate the legal framework of your 501(c)(3) status.

Clarify for students what role you will play and be sure that they understand that it is different from that which you play normally as teacher. You will act as facilitator, teaching them skills, offering guidance, and helping to direct the flow of their decision-making process, but not imposing your vision on the outcomes of the work of the foundation.

BOARD MEETINGS

YOU SHOULD MAKE every effort to differentiate Board Meetings from regular class sessions. This distinction can be accomplished in a number of different ways. The classroom can be set up to resemble a board room or the students can actually meet in the school's or synagogue's board room. You can suggest or impose a dress code (though this may cause more trouble than it's worth). It's certainly a good idea for you as the teacher to dress more formally for Board Meetings to suggest a change of tone. With older students, you may want to spend some time introducing the principles of parliamentary procedure and choose to run your meetings accordingly. Any or all of these things will reinforce the seriousness of the project the students are undertaking.

CHOOSING AN ISSUE & DEVELOPING GRANT GUIDELINES

AS STRAIGHTFORWARD AND simple as this initial step in the process seems to be, it must be managed with caution and seriousness. Not only is it the first, formative piece of business that the Board will undertake, it is also the least defined. It is one of the rare moments in the process when a few determined malcontents can undermine the project by proposing and pursuing a "joke issue" (at Temple Isaiah, the all-time zinger issue proposal was "vintage roller coaster restoration"). It also establishes the issue realm in which the foundation will operate for the rest of the year.

This is also the occasion of the program's first homework assignment.

Throughout the process, there will be several opportunities for students to make contributions to the work of the foundation outside of class. In this case, the assignment should be simple and straightforward: think about the issues that really matter to you and come to class prepared to propose, discuss, and vote on an issue for the foundation to focus on this year.

You may want to give some examples (e.g. homelessness, human rights, poverty, etc.) or use the opportunity of the assignment to have a preliminary discussion about the pros and cons of different kinds of proposals. In this case, the key question to raise is how broad or narrow the issue should be and how that choice will affect the grant-making decisions of the foundation.

By choosing a broad issue like "helping people," the foundation will likely have a hard time focusing and will be confronted with proposals from very diverse organizations whose activities are difficult to compare. With a narrower issue like "finding a cure for AIDS," the foundation may have a difficult time soliciting enough proposals to make the decision-making process sufficiently challenging and rewarding. By discussing these issues before giving the homework assignment, students will be better prepared for the first meeting.

You have several important responsibilities within this process. First of all, facilitate an orderly discussion. Brainstorming has an inherent potential to get anarchic. Help

your students put into practice what they've learned. Secondly, keep your eyes on the big picture. The class's experience will be much better over the long run if the issue they select is broad enough so that many organizations will fall under its rubric, but narrow enough that applying organizations can be compared and contrasted with one another based on similar criteria. Help them with this by strategically combining and dividing different suggestions into more useful categories. As another example, "gun control" might be a bit too narrow, but could be combined with some other suggestions into a broader "anti-violence" theme. Finally, make sure they feel like they've had a chance to exercise their power. They'll be on the lookout to see if the whole thing's a fraud; that you've set them up to think that they're going to have authority, but then you're not going to actually trust them to exercise it.

Note that there's occasionally some resistance to the idea of choosing a theme at all. Some students will invariably feel that their choices are being limited by the imposition of a theme. While these concerns should be validated, it's very important for the manageability of the project that the class choose a theme. Without the direction that a theme affords, it's much more difficult for students to target potential grant applicants. Furthermore, the number of applications can become unwieldy. Finally, it's much more difficult to evaluate the relative strengths and weaknesses of organizations with totally different goals and missions.

To help inform this process, you

may want to print copies of grant guidelines from several local foundations (most foundations place them on-line). This will give students a sense of the kind of framework they should develop,

DESIGNING A REQUEST FOR PROPOSALS AND GRANT APPLICATION

THIS IS AN activity in which student involvement will likely vary based on age and time dedicated to the project. On the one hand, it's important for students to have input into what information organizations should provide in order to request grants. On the other hand, the structure of an RFP and Grant Application is limited by certain generally-accepted protocols. Ultimately, you'll need to make sure your RFP and Application conform to some basic guidelines, but give the students as much opportunity as possible to be part of the process. (You'll find samples from the Temple Isaiah Seventh Grade Fund on *p.88*.)

With younger students, you may spend some time brainstorming ideas for questions that should be included in the Grant Application. Then you can have them combine questions and narrow down the list to certain key themes. With sufficient guidance, students should be able to generate the key questions that will need to be part of your Application.

Older students may want to play a greater role in the development and design

of the RFP and Application. In this case, you can give them an opportunity to explore sample RFPs and Grant Applications online. Through surveying the standard formats these documents take, they should be able to craft a suitable RFP and Application for *Tzedakah in Action*.

Some key elements that your RFP should contain include:

- Amount of maximum grant.
- Stipulation that grants will only be given to 501(c)(3) organizations.
- Issue area (e.g. poverty, homelessness, human rights, etc.).
- Submission deadline.
- Contact information for your foundation.

The Application should definitely request the following information (at least):

- Contact information.
- Description of the organization.
- Description of project, including budget and amount of grant request.
- Verification of 501(c)(3) non-profit status.

FINDING AND WORKING WITH ORGANIZATIONS

IDENTIFYING AND SHEPHERDING POTENTIAL APPLICANTS

ONCE THE CLASS has settled on a theme, the students should take responsibility for identifying potential grant recipients. This is the occasion of the second homework assignment. Immediately after the theme has been selected, students should be given a week or so to identify different organiza-

tions whose work falls within the issue area. Depending on the size of the class, each student should be expected to generate 5-10 organizations.

Assuming a reasonable amount of overlap among student lists, a list of 50-100 organizations is a good goal. You, as teacher, should also feel free to seek out organizations. The more RFP and Application packets you send out, the more proposals you'll receive. You should know that return rates can be as low as 5-10%, so don't get frustrated if you don't get as many proposals as you'd hoped. Also remember that proposals tend to come in at or near the deadline, so be sure to give yourself enough time after the deadline to read through and prepare proposal packets for the Board.

It's a good idea to set aside some time during the first Board Meeting to brainstorm ways for students to find organizations and to clarify what kind of information they should be collecting about them. Clearly, the internet is going to be a primary resource for many students to pursue their research.

During this conversation, it will also be valuable for you to discuss the pros and cons of working with non-local applicants. While casting a wide net may bring in some very interesting proposals, distant organizations are less likely to be able to present directly to the Board and form a close relationship with your community.

As the teacher, you will need to serve as the contact person for grant applicants. In this capacity, you'll need to answer

questions about the Application and offer advice about how to tailor proposals to the unique interests of the Board you represent. This is a perfectly appropriate and ethical role for you to have and you should be as up front and direct with applicants as you can be. In addition, you should read each of the proposals as they come in and make sure they meet the criteria spelled out in the Application. It's especially important that each proposal include proof of 501(c)(3) status – make sure you get this and that it's valid and current.

As proposals come in, you should offer each organization the opportunity to make a presentation before the Board. If you include information on the presentations in the RFP, some organizations will contact you directly, but it's a good idea to suggest it to each organization as long as you have time slots available. If an organization takes advantage of this opportunity, be sure that whoever is presenting knows that s/he will be presenting to students and that a standard foundation pitch may not be appropriate. Give them whatever advice you can about the dynamics of the group, questions they can expect, etc., in order to help them prepare an interesting and informative presentation.

This phase of the process also offers an excellent supplemental opportunity for older students. In order to bring the class up to speed on the theme, students could be assigned to do background research and prepare a short "briefing book." This could include a brief history of the issue, a

list of terms and definitions, and other background that would familiarize the class with the issue. The project could be taken on by a small group of volunteers or each student could be assigned a small part to contribute.

DEALING WITH PROPOSALS

THIS IS A FAIRLY straightforward part of the process, though one which will occupy a significant amount of time and work for students. Once all the proposals have been collected, you should produce a photo-copied packet for each student. (HINT: Write each student's name on his/her packet so you can return those that get left behind or otherwise misplaced.) It's not a bad idea to include a cover sheet that briefly summarizes all of the proposals and the amount of each grant request (see *p.90* for an example).

If you want to get very professional, you can assemble all of the proposal information into a two-pocket folder, with the proposals on one side and an evaluation form and copies of the RFP and Grant Application on the other. This is essentially the way that professional foundations prepare their grant officers, and it will help to enhance the seriousness of the undertaking for your students.

FACILITATING PRESENTATIONS

THERE IS PROBABLY no more inspiring element in this entire project than the organization presentations to the Board. There's nothing quite like seeing an adult with a title like Chairperson or Director of Development make a respectful and intelligent presentation requesting the financial support and investment of a roomful of thirteen-year-olds. It turns the traditional child-adult relationship on its head in a profound and wonderful way. Instead of adults telling children what to do and children using petty exercises of power to bewilder adults, the normal power relationship is reversed. The result is a mechanism for positive change instead of a tool of rebellion for the sake of rebellion. The impact of this reversal is remarkable, both for the students and for the adults who stand before them.

The keys to a successful presentation day are good planning and good organization. Make sure students bring their packets (even consider having them leave them at school during the class session before) so they'll be able to take notes directly on each proposal. Fifteen minute presentations, including Q&A, seem to be a good baseline. If you are scheduling several presentations on the same day be sure to schedule time for a break in the middle so students will stay fresh through the whole session.

Make sure that the presenters know where to go and at what time they will present, and ask them to come fifteen minutes early. It's probably not a good idea to have them sit in on each other's presentations — the

temptation to compare/contrast with a previous presenter can be extreme. Also make sure that you have ready any A/V equipment (overhead projector and screen, TV/VCR, etc.), that they've requested.

MAKING THE DECISIONS

THE DECISION-MAKING mechanism you implement will depend greatly on the number of proposals you receive and the number and amount of the grants you are able to fund. First of all, if there are more than ten proposals on the table, it's going to be helpful to do a first-cut vote to narrow the options down to ten at the most. Discussing and voting on more than ten proposals is unwieldy at best. The class should obviously be given an opportunity to consider all of the proposals before any voting takes place, but this initial discussion and vote should happen fairly quickly so more time can be given to in-depth deliberation on the most serious proposals. Reviewing the grant guidelines before this process begins will help students use concrete criteria in these deliberations.

After the list is narrowed down to a more manageable number, significant time should be dedicated to the discussion and evaluation of proposals. You may choose to consider each in turn and allow Board members to advocate or critique proposals one at a time, or you may simply open the floor for general discussion.

Before proceeding to a vote, it's important that you clarify what decision-

GRANT DISTRIBUTION AND PRESENTATION

making procedure you'll be using. While there are a number of voting models that may work, the most equitable and realistic option is a proportional, winner-take-all model. Here's how it works: Assuming you've narrowed the list down to ten choices, each student would be allowed to rank the ten proposals on a secret ballot, giving ten votes to his/her top choice, nine to the next, and so on down to one. After all of the ballots are collected, votes are tallied and the proposals receiving the highest number of votes receive their full grant requests until the foundation runs out of money.

(For example, assume your foundation has \$8,000. The proposal receiving the highest number of votes gets its full grant request of \$3,000. The second place proposal gets its full grant request of \$4,000. The third place proposal, which requested \$2,500, receives a partial grant of \$1,000.)

This method insures not only a fair and democratic process, but also has the added benefit of allowing participants to represent the intensity of their feelings about particular proposals. (NOTE: Another variation on this method is to give each student ten votes to allocate among the proposals however he/she wants. This insures that students who have a particular proposal that means a great deal to them can show strong support for that organization while ceding some authority on other decisions.) The most important aspect of this process is that the students know in advance how the voting will take place so they feel fully in control of the decision.

AFTER THE DECISIONS have been made, you'll need to notify both the organizations that received grants and those that did not. You'll find sample letters on pp.92-93. Note that the sample letter for grant recipients asks that the person responsible for administering the grant sign and return a copy of the letter. This is just a good way to maintain accountability before sending off large checks. It's also important to follow through once you receive the organization's summary of its progress on the terms of the grant. This is a good way to stay involved with the organization and also an important form of accountability. Once you receive the signed letters back, have the checks cut and mailed and you're almost done!

Now that the decisions have been made and the checks mailed, be sure to end on a very positive note. Plan a presentation ceremony, preferably associated with an end-of-year service or graduation. Invite the grant recipients to attend and welcome them into the community with which they are entering into this covenantal partnership.

Ask students to prepare speeches about their experiences in *Tzedakah in Action*. This isn't only about good public relations and publicity. It's about honoring and celebrating young people when they commit themselves to making the world a better place. That positive reinforcement is a crucial element of helping them grow up with a deep sense of the role of Jewish values in their lives.

CLOSURE AND FOLLOW-UP EVALUATION

AS WITH ANY substantial project, it is very important to take time at the end of each *Tzedakah in Action* cycle to evaluate the experience with students. This evaluation process benefits both the specific students in the class and the program as a whole. Students will not only get an opportunity to reflect on their experience and articulate their feelings about that experience, but the program will benefit from their unique perspective and will evolve through their input.

Furthermore, the institution should make an effort to track the long-term impacts of the program: Does individual student *tzedakah* giving rise over time? Do overall *tzedakah* collections by the school increase over the long run due to a change in the culture? Do students play a greater role in *tzedakah* decision-making within their families? Of course, it would also be useful to seek parent input and feedback on the program to determine what kind of impact they observe in their children as a result of participation in the project.

Immediate evaluation should occur in both written and group discussion formats. Written questionnaires allow for the collection of quantifiable data that can be tracked over time. Class discussions present opportunities for students to respond to one another's comments and critiques and build on each other's ideas. Ideally, the evaluation process should be repeated with each class a couple of years after each project cycle ends.

This would allow not only constructive feedback to improve the program over time, but also an opportunity to track the impact of the project on students' commitment to *tzedakah*.

Each program should develop its own set of questions, but the following are some key concepts that should be discussed:

- What was the best part of the *Tzedakah in Action* experience for you?
- What was the most challenging aspect of the project for you?
- How could we have prepared you better to fulfill your responsibilities as Trustees?
- If you were pitching this program to next year's class, what would you tell them to convince them that they should support it?
- Do you think you changed as a result of your participation in *Tzedakah in Action*? In what ways?
- Do you think that you will be more likely to give *tzedakah* in the future as a result of your participation in this project?

Conclusion & Next Steps



MAZEL TOV! YOU'RE ON YOUR WAY to starting a foundation! In publishing this manual, Temple Isaiah and the Walter & Elise Haas Fund hope to inspire the creation of many Jewish youth foundations modeled on *Tzedakah in Action*. We need your help to do that. What can you do? A few things come to mind.

First, let us know you're pursuing the project. Send us an e-mail to tzedakabin-action@socialaction.com. We'll put you on the e-mail list and keep you up to date about developments in the program. As organizations adopt the project, we'll be able to coordinate efforts and create opportunities to share resources and experiences. This will also give you a pool of colleagues with whom to share ideas and ask questions.

Second, share your experience with the program in your broader Jewish community. If yours is the first organization to put the program in place in your community, you will soon be the

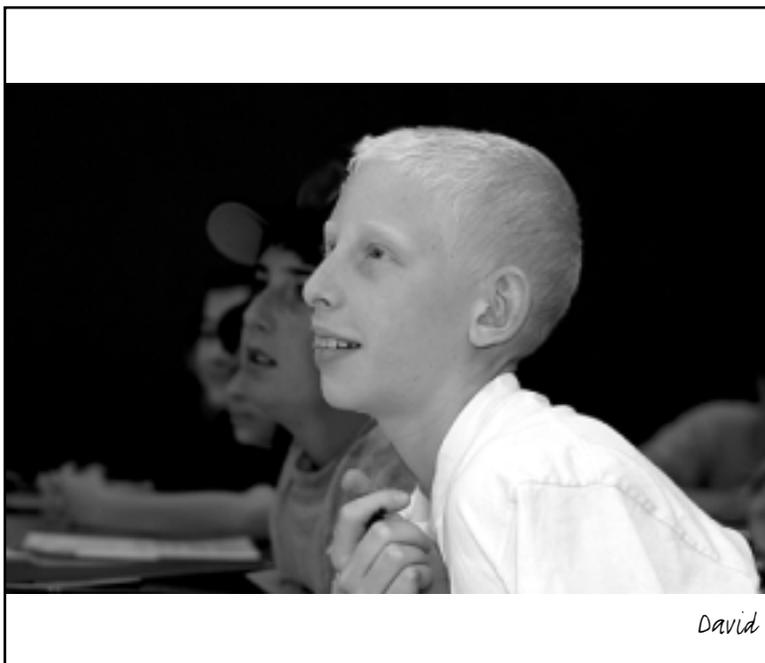
expert on it and will be in the best position to help other local synagogues and day schools create their own *Tzedakah in Action* projects.

Finally, reach out to the philanthropic community in your area, both Jewish and otherwise, and let them know what you're doing. Not only will they be likely to provide you with valuable support, they will probably be interested in encouraging the program's broader distribution. And as a *Tzedakah in Action* foundation, your program should be part of the local philanthropic community in its own right.

When I was first considering putting this program down on paper, I had a sudden inspirational thought: What an incredible day it would be when *Tzedakah in Action* hit the \$1,000,000 mark in aggregate grants. I hope you'll share that vision with me and work towards seeing Jewish young people make a serious contribution to the American philanthropic landscape. *B'hatzlachab!*

APPENDIX A:
TZEDAKAH AND PHILANTHROPY

PHILANTHROPY AND *TZEDAKAH* are subjects of great breadth and depth and are deserving of significant study. This appendix is intended to provide you with a brief introduction to the history of these traditions and how they apply to *Tzedakah in Action*. The Bibliography lists a number of resources that can provide additional background on both *tzedakah* and philanthropy.



In order to understand these terms, it's useful to see how they relate to each other. In its broadest sense, "philanthropy" has come to embrace the full range of human altruistic behavior. As such, it encompasses *tzedakah* as the specifically Jewish variation on this theme. There are at least two critical distinctions, however, that make *tzedakah* unique among forms of philanthropy. First, it was a formative building block that set in motion the development of philanthropy as a social norm. The Torah's collection of *tzedakah* guidelines was one of the first (if not the first) written articulations of a community's obligation to care for the poor. This

leads to a second key distinction. Unlike philanthropy, which presupposes freedom of choice on the part of the giver, *tzedakah* is an obligation imposed on all Jews. With these distinctions in mind, the following two sections spell out some important basic information on both traditions.



*TZEDAKAH AND
THE JEWISH
TRADITION OF
GIVING*

*"Justice, justice
shall you pursue."
(Deuteronomy
16:20)*

WHILE IT IS often considered synonymous with charity, *tzedakah* has unique qualities that set it

apart. Unlike charity, which derives from the Latin *caritas*, meaning love, the word *tzedakah* comes from the Hebrew root *tzedek*, meaning justice or righteousness.

Giving *tzedakah*, therefore, is considered not only an act of generosity, but a manifest responsibility for all Jews. For many, *tzedakah* is considered the highest moral obligation of the Jewish people: "According to the Talmud and Maimonides, the disposition to be responsive to human beings in need is an important characteristic of Jewish identity as well as a condition *sine qua non* of membership in the covenantal community of Israel."¹⁷ In this respect, *tzedakah*

has an important and subtle goal beyond the obvious alleviation of poverty – the development of a binding Jewish communal consciousness.

Origins in Torah

The origins of the rules of *tzedakah* can be traced to agricultural *mitzvot* in the *Torah*. Several specific commandments spell out farmers' obligations to help the poorest members of their communities. The following quotations from Leviticus and Deuteronomy offer specific and explicit instructions for how a community should care for its impoverished members:

When you reap the harvest of your land, you shall not reap all the way to the edges of your field, or gather the gleanings of your harvest. You shall not pick your vineyard bare or gather the fallen fruit of your vineyard; you shall leave them for the poor and the stranger.

— (Leviticus 19:9-10)

And when you reap the harvest of your land, you shall not altogether remove the corners of your field when you reap, nor shall you gather any gleanings of your harvest: you shall leave them to the poor and the stranger.

— (Leviticus 23:22)

When you reap the harvest in your field, and have forgotten a sheaf in the field, you shall not go back to fetch it: it shall be for the stranger and the widow and the orphan.

— (Deuteronomy 24:19)

It is from these passages that Jews derive many of the operative principles of *tzedakah*. These passages can serve as an introduction to the concept of individual responsibility within a community and the role of social justice in Jewish tradition.

TZEDAKAH PRINCIPLES AND APPLICATIONS TO TZEDAKAH IN ACTION

Tzedakah as Obligation

Jewish law stipulates that giving *tzedakah* is an obligation imposed on all Jews. According to Rabbi Moses ben Maimonides (known by the acronym Rambam), “Anyone who sees a poor person and avoids him and does not give him *tzedakah* has violated a prohibition” (*Mishneh Torah, Hilkhot Matenot Aniyim* 7:I-2).¹⁸

Even Jews who receive *tzedakah* in order to survive are obligated to give from what they receive. Giving helps people gain perspective on their own situation by recognizing that there are always others in greater need. In this respect, *tzedakah* has a psychological dimension that transcends the practical. As such, giving *tzedakah* may be of even greater importance to those in need, since giving *tzedakah* is an obligation imposed universally on all members of the Jewish community, and being excused from it could be humiliating for the poor.

While Jewish law emphasizes that the primary recipients of *tzedakah* should be members of the Jewish community, there is an admonition that “everyone who asks for bread should be given food, whether a Jew or not” (*Shuchan Aruch* 251.I3).¹⁹ As Jews have become integrated into American society, tension has

grown between our obligations to fellow Jews and our responsibility to help all people in need. You may choose to engage students in a discussion of this tension in order to decide whether your program will give exclusively (or preferentially) to Jewish organizations (to be specified in Request for Proposals).

Rambam's Ladder of Tzedakah

In the 12th Century CE, Rambam consolidated Jewish teachings about *tzedakah* into his eight-rung Ladder of *Tzedakah*. This is probably the most frequently cited and most succinct *tzedakah* teaching. It lays out a simple and accessible hierarchy for giving that emphasizes the importance of preserving the dignity of the recipients. According to Rambam, the higher one climbs on the ladder, the greater the quality of one's *tzedakah*:

1. *Giving reluctantly and with regret*
2. *Giving graciously, but less than one should.*
3. *Giving what one should, but only after being asked.*
4. *Giving before being asked.*
5. *Giving without knowing to whom one gives, although the recipient knows the identity of the donor.*
6. *Giving without making one's identity known.*
7. *Giving without knowing to whom one gives. The recipient does not know from whom he/she receives.*
8. *Helping another person to support himself/herself by a gift or a loan or by finding employment for that person, thus helping that person to become self-sufficient.*

It should be obvious that within Rambam's hierarchy, there is an implicit obligation to give *tzedakah* – the option not to give is not even considered. It's also interesting that the emphasis on maintaining the anonymity of the recipient

and the donor receives ever greater consideration until the last rung, at which point it is no longer mentioned. The message is that helping someone become self-sufficient is of such value that the question of anonymity pales in comparison.

*Giving with Honor and Dignity*²⁰

Throughout the progression of Rambam's hierarchy, there is a clear preference for honoring the recipient of *tzedakah*, whether by giving graciously or by respecting the recipient's anonymity. Jews are obligated to give with *kavod*, or honor, and strongly condemned if, in the process of giving, we inflict *bushab*, or humiliation, on the recipient. For Jews, the means of *tzedakah* are just as important as the ends. This notion is eloquently expressed in the following passage:

If a person has no clothing, clothe him; if he has no household utensils, buy them; if he has no wife, arrange for him to get married; if a woman, arrange for her marriage to a husband. Even if the practice of this poor person had been to ride on a horse preceded by a running servant and the person had financial reversals, buy him a horse to ride and a servant to run before him. The mitzvah is to fulfill his needs but not to make him rich.

— (Mishneh Torah 7:3)²¹

Here, the detailed list of obligations is less about specific responsibilities than about encouraging a giver to engage with a recipient as an individual and not as a nameless, faceless poor person. We should seek to know and understand the poor and disenfranchised in our communities and not feel that our duty is

discharged when we write a check or give a beggar some change.

Ultimately, “the most subtle expression of *tzedakah* involves one’s response to a person one cannot adequately help”²² – *tzedakah* transcends money. It should not simply be something we do, it should infuse our essential being.

Preventive Tzedakah

As a corollary to the themes articulated by Rambam, Jewish teaching suggests that *tzedakah* given to prevent someone from falling into poverty is preferable to *tzedakah* given to one who is already poor. Rashi admonishes,

Do not let your brother slip down until he falls completely, for then it will be difficult to raise him; rather strengthen him as he begins to fall. To what is this comparable? To a burden upon an ass; while it is still on the ass, one person can hold it and set it in place; if it falls to the earth, even five people cannot set it back.

— (Rashi’s commentary on Lev. 25:35)²³

This distinction reflects a sophisticated understanding of human psychology. Because we long for appreciation and praise, we often prefer to help those who are truly destitute instead of those whose immediate need is not so obvious. Judaism acknowledges this and attempts to mitigate it by arguing that the value of *tzedakah* should not be measured by the effort expended, but by the results achieved. Offering someone a discrete small loan to help her start a business may not have the glory associated with some more obviously heroic act, but in the long run, this small act of *tzedakah* may allow the businesswoman to make her own contribution to the

tradition of *tzedakah*. We ought to resist the inclination always to pursue the heroic and dramatic action over the less glamorous but more efficient investment.

This lesson is very important within the *Tzedakah in Action* context. Students often have a tendency to gravitate towards organizations that are direct service providers because their missions are easier to understand and their impacts are more tangible. For example, the work of a food shelf is much more direct and easy to understand than the activity of a political advocacy non-profit pursuing welfare-reform legislation. Nonetheless, the value of preventive *tzedakah* should encourage students to look at root causes of deep social problems and seriously consider supporting organizations that pursue solutions to those problems.

It’s also important that students understand that doing *tzedakah* isn’t always scintillating work. Fundraising and reading grant proposals will never top anyone’s list of really fun stuff. Doing the right thing and making the world a better place, however, entail both interesting experiences and some fairly tedious work and you should not contribute to students’ illusions that it’s all exciting and heroic.

Tzedakah for the Giver as Well as the Recipient

“It was taught in the name of Rabbi Yehoshua: The poor person standing at the door does more for the householder than the householder does for the poor person.”

— (Vayikra Rabba 34:8)²⁴

One of the themes that runs through much of the literature of *tzedakah* is an emphasis on its transformative effect on the giver. Insofar as it preserves and enhances life, the value of *tzedakah* for the recipient is immediate and obvious. In a broader sense, however, the role of the recipient is almost seen as instrumental to the much more subtle and profound work of humanizing the giver – the giver helps the recipient live and the recipient helps the donor become fully human. The implications of this are remarkable. Danny Siegel tells the story of a poor man who “approached a certain rabbi and said to him, ‘Zaki Bi – Assume your right, your privilege, to do this *Mitzvah* of *Tzedakah* through me.’”²⁵ By making the *tzedakah* transaction one of shared responsibility, it greatly enhances the value and dignity of the person who depends on *tzedakah* to live. This lesson cannot be overemphasized in the *Tzedakah in Action* classroom. The work must be done with humility and deep gratitude.

The Responsibilities of Tzedakah Fund Administrators
Of particular importance to *Tzedakah in Action* are the guidelines Judaism offers for *tzedakah* fund administrators. On the whole, the guidelines cover conflict of interest, oversight, fraud, misuse of funds, and many of the other mundane aspects of non-profit management. One concept, however, seems especially relevant to *Tzedakah in Action*. The text explicitly requires *tzedakah* fund administrators to be discriminating in their deliberations: “[*Tzedakah* fund] administrators must be wise and strict with the poor that they not be frauds” (*Ramah, Yoreh Deah* 257.1)²⁶. Many students become uncomfortable with the responsibility of deciding among many

proposals, knowing that they will have to reject some. This passage is representative of a clear mandate that *tzedakah* fund administrators have to make judicious decisions for the benefit of the community. Ultimately, it should empower students to wrestle with the difficult decisions that will confront them.



A CRASH COURSE IN CONTEMPORARY PHILANTHROPY

*A Brief History of Philanthropy*²⁷

The word “philanthropy” comes from Greek, meaning “the love of mankind.” Bob Payton, Professor of Philanthropic Studies at Indiana University, offers a more specific and functional definition: “voluntary action for the public good.”²⁸ In this sense, we can already distinguish a key difference between *tzedakah* and philanthropy – within Jewish tradition, giving is an obligation, while in the broader philanthropic tradition, it is generally considered a voluntary choice. Despite this distinction, we will consider philanthropy in the broadest sense, with *tzedakah* representing one of its most important roots.

Historically, our contemporary notions of philanthropy evolved from a blending of Judeo-Christian ethical teachings and Greek and Roman civic concepts. In Judaism, *tzedakah* was the operative principle. In Christianity, care for the poor came under the rubric of charity, or “relief from suffering.” These traditions focused philanthropic energy on social services, obligating the community to provide for the poor, the

sick, the elderly, and other vulnerable members of society. The major Greek and Roman contribution to the philanthropic landscape was the notion of creating public institutions whose activities would benefit the community as a whole. This tradition underlies philanthropic donations to universities, libraries, symphonies, and other cultural institutions. In the United States, “nearly a third of all giving. . . goes to causes other than charity or health care – about 20% to education and cultural pursuits, much of the remainder to public benefit, the environment or international affairs.”²⁹

With Constantine’s adoption of Christianity as the state religion of the Roman Empire, the provision of social services passed to the Church, where it remained through the Middle Ages. During this period, roughly 400CE to 1500CE, the monastic movement established prototypical hospitals, orphanages, and nursing homes, and charitable religious orders like the Franciscans arose out of a need to directly address the suffering of the poor. This period also saw the development of the guild system of membership organizations. These were initially created as social and eco-

conomic support systems for the new professions. Ultimately, guilds were the precursors of contemporary non-profit membership societies,



including not only their obvious heirs, the trade unions, but also the YMCA and JCC movements and modern member-driven churches and synagogues. Finally, the Middle Ages witnessed the genesis of the university as a private institution dedicated to the public good.

The next major shift in philanthropic development took place in England. When Henry VIII broke away from the Roman Catholic Church and confiscated its properties, the Church was no longer able to fulfill its role as central provider of social services. The state, therefore, stepped in to provide for the needy. In 1601, the Elizabethan Parliament passed a series of laws called the Statute of Charitable

Uses. These laws were the first codification of what would later become the welfare state. Provisions included food and shelter allowances for those unable to work as well as requirements for the able-bodied to find work (and Congress thought the 1996 Welfare Reform Act was revolutionary!).

Through the 1800s, non-profit social service activity continued to mature into a genuine “third sector” (so-called to distinguish it from the business/ for-profit and government/ public sectors). The Red Cross, the Salvation Army, and other voluntary organizations

grew out of the extreme deprivation and social dislocation caused by industrialization and urbanization on the one hand and catastrophic war on the other. In addition, the social reformer Jane Addams founded Hull House in Chicago in 1889, establishing the first settlement house in the United States. She and other social reformers lived in the house and essentially invented contemporary social work practices through their work to improve conditions in the surrounding neighborhood.

The 20th Century saw the creation of

the charitable foundation, the pivotal development in the history of *Tzedakah in Action!* The private foundation movement can be traced in large measure to Andrew Carnegie and the vision he articulated in his book, *The Gospel of*

Wealth. His distilled thesis is that the wealthy have an obligation to use their money to contribute to the improvement of the human condition.

Following his example, some of the wealthiest people in American business have established some of the most generous sources of social service

and cultural funding on the planet. Examples include the Rockefeller Foundation, the Ford Foundation, the Kellogg Foundation, the Walter & Elise Haas Fund (established by a former President and Chairman of Levi Strauss and Co.), the Pew Charitable Trusts (established by the founder of the Sun Oil Company), the Annie E. Casey Foundation (established by one of the founders of United Parcel Service), and the Kresge Foundation (established by the founder of the Kresge and K-Mart chain of stores).



Paul

Closely related to the private foundation movement has been the evolution of corporate philanthropy. While private foundations are often established by successful business people, their operations are kept separate from their founders' businesses. Corporate philanthropy, on the other hand, is based within corporations, which consider it a part of doing business. The role of philanthropy in the business community was best articulated by the Business Roundtable in its 1981 "Position on Corporate Philanthropy": "All business entities should recognize philanthropy both as good business and as an obligation if they are to be considered responsible corporate citizens of the national and local communities in which they operate."³⁰

The explosion in individual giving over the last century has been the last critical development which has ultimately led to the possibility of programs like *Tzedakah in Action*. Called the "democratization of philanthropy," this trend was based in large measure on the church collection plate model and spurred by the dramatic expansion of the middle class. First manifest in the broad public appeals of the Red Cross during World War I, the notion of federated campaigns for public donations led not only to the creation of the United Way, but also provided the model for the Jewish community's Allied Jewish Campaign fundraising practice. Individual giving now accounts for 90% of American philanthropy.³¹

Tzedakah in Action locates itself at the nexus of this extraordinary history of philanthropy. It is a direct descendant of the private foundation movement, receives a great deal of its funding as a result of the democratization of

philanthropy, and sees its mission as contributing to *tikkun olam* and guided by the wisdom of thousands of years of Jewish *tzedakah* teaching. Finally, and not incidentally, this curriculum was produced through the generosity of a major private foundation (the Walter & Elise Haas Fund).

*The American Non-Profit Sector
and Contemporary Philanthropy*

The American Non-Profit Sector consists of some 1.6 million organizations (c.1995) which can be divided into two major categories: member serving and public serving.³² Altogether, their expenditures account for 9% of the Gross National Product (c.1996). They range from small, single-issue political advocacy organizations to vast cultural and educational institutions like the Metropolitan Museum of Art and Harvard University. While it is difficult to draw any general conclusions about institutions across the sector, some general criteria apply. According to Cal Patterson,

"Organizations in this sector are:

- institutionalized to some extent (not ad hoc, informal, or temporary gatherings),
- private, as opposed to governmental,
- non profit distributing,
- self-governing,
- voluntary, and
- of public benefit."³³

Foundations are a crucial engine of financial support for these organizations. They range in size from small family and community institutions to massive private foundations like the Bill & Melinda Gates Foundation, which gave away nearly \$1 billion during fiscal year 2000.³⁴

There are four kinds of foundations:³⁵

Private Foundations receive their funds from an individual (or family) and use the income to make grants to individuals or organizations. The Bill & Melinda Gates Foundation is an example of this type of foundation. (*Tzedakah in Action* is a variation on this type of foundation, except that instead of making grants out of endowment interest, it gives away its entire principal each cycle.)

Corporate Foundations receive their funds from a business or corporation. The trustees and staff of the foundation may be drawn entirely from the ranks of the employees of the corporation, although they often include at least a few from outside the corporation. Like private foundations, corporate foundations use their investment income or principal to make grants to support projects and organizations. The Ford Motor Company Fund (separate from The Ford Foundation, a private foundation) is an example of this type of foundation.

Community Foundations receive their funds from many individuals, either while they are still alive or as bequests in their wills. The trustees and staff then use the income from these invested funds to support causes specified by the donors, or, if the donors have left the choice up to the trustees and staff, to support causes or projects the foundation itself believes will benefit the community it serves. The San Francisco Foundation and the New York Community Trust are examples of community foundations.

Operating Foundations conduct or operate projects themselves, rather than giving grants to other organizations to conduct the projects.

Operating foundations can receive their funds from many sources, and can receive grants as well. The Annie E. Casey Foundation is an example of an operating foundation.

The range of activities which foundations support and the criteria they apply to grant seekers are too broad to summarize in any detail here, although we can draw some broad generalizations. As a general rule, foundations only fund 501(c)(3) non-profit organizations (more about what this means later). They receive many tax benefits because of this and would lose those benefits if they chose to fund outside the non-profit sector. Most foundations also identify certain “areas of focus” based on their missions or their founders’ interests, that guide their giving. These issues include areas like education, health care, the environment, and medical research. In addition, many foundations restrict their giving to certain geographical regions.

Foundations have many different ways of attracting proposals, but most rely on some combination of a Request For Proposals (also known as an RFP) and a Grant Application. The RFP is like a press release, announcing that the foundation is accepting proposals for grants and laying out the criteria for applying. Since foundations often operate on quarterly grant cycles, RFPs also indicate the deadlines for each part of the proposal. The Grant Application is exactly what it sounds like, a format through which grant applicants can articulate their charitable activities and desired outcomes, and make the best case for why they should receive a grant.

Endnotes for Appendix A

¹⁷David Hartman, Tzvi Marx, and Noam Tzion, *The Dynamics of Tzedakah: From Dependence to Dignity* (Jerusalem, Israel: The Shalom Hartman Institute for Advanced Studies) 6.

¹⁸Quoted in Sharon Strassfeld and Michael Strassfeld, ed., *The Third Jewish Catalog* (Philadelphia: The Jewish Publication Society of America, 1980) 12.

¹⁹Quoted in “Guidelines for Giving: To Whom Should I Give?” Just Tzedakah, <<http://www.just-tzedakah.org/guidelines/whom.html>>.

²⁰For an outstanding treatment of *tzedakah* as giving with honor and dignity, check out *The Dynamics of Tzedakah: From Dependence to Dignity*, by David Hartman, Tzvi Marx, and Noam Zion, published by the Shalom Hartman Institute in Jerusalem.

²¹Quoted in <www.just-tzedakah.org/guidelines/amount.html>.

²²Hartman, Marx, and Tzion 12.

²³Quoted in Hartman, Marx, and Tzion 9.

²⁴Quoted in Steven Bayar et al., *The Ziv Giraffe Program: A Curriculum for Tikun Olam* (Millburn, NJ: Ziv Tzedakah Giraffe Project, 1998) 252.

²⁵Danny Siegel, *Gym Shoes and Irises (Personalized Tzedakah)* (Spring Valley, New York: The Town House Press, 1982) 6.

²⁶Quoted in “Administrators of Tzedakah Funds.”

²⁷Much of this section is derived from a paper prepared by Cal Patterson based on material taught at Wayne State University in a survey course on philanthropy, voluntarism, and the nonprofit sector. Cal Patterson,



Philanthropy and Voluntary Association, Learning to Give: Teaching the Importance of Voluntary Action for the Common Good in a Democratic Society, <<http://www.learningtogive.org/pva.html>>.

²⁸Patterson, “Introduction,” <http://www.learningtogive.org/pva_intro.html>.

²⁹Patterson, “Philanthropy, the Greek-Roman Tradition,” <http://www.learningtogive.org/pva_phi.html>.

³⁰Quoted in Patterson, “Corporate Philanthropy,” <http://www.learningtogive.org/pva_corp.html>.

³¹Patterson, “Corporate Philanthropy.”

³²Patterson, “Philanthropy and the Third Sector,” <http://www.learningtogive.org/pva_third.html>.

³³Patterson, “Philanthropy and the Third Sector.”

³⁴“Top 100 U.S. Foundations by Total Giving,” The Foundation Center <http://fdncenter.org/research/trends_analysis/top100giving.html>.

³⁵Debbie Bertolet and Barbara Jacquette, Youth in Philanthropy Project (ArizonaGIVES/Arizona Community Foundation, 1994) 5.9-5.10.

APPENDIX B: ADDITIONAL RESOURCES

THE SEVENTH GRADE Fund developed in an American landscape in which a commitment to youth philanthropy is very much in vogue. Both within the Jewish community and in the broader philanthropic and educational worlds, significant resources are being directed at service learning – a rubric under which both philanthropic and volunteer work fall. In light of that, you should be aware of some of the major organizations that are engaged in this work so you can keep abreast of their activities and their progress.

PHILANTHROPY

The Catalog for Giving	http://www.catalogforgiving.org
The Chronicle of Philanthropy	http://philanthropy.com
The Foundation Center	http://www.fdncenter.org

YOUTH PHILANTHROPY

Learning to Give	http://www.learningtogive.org
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JEWISH PHILANTHROPY AND *TZEDAKAH*

Jewish Funders Network	http://www.jfunders.org
Jewish Fund for Justice	http://www.jfjustice.org
Just <i>Tzedakah</i>	http://www.just-tzedakah.org
Mazon	http://www.mazon.org
The Shefa Fund	http://www.shefafund.org

JEWISH SOCIAL JUSTICE

American Jewish World Service	http://www.ajws.org
Jewish Social Justice Network	http://www.jfjustice.org/jsjhome.htm
PANIM: The Institute for Jewish Leadership and Values	http://www.panim.org/
Religious Action Center of Reform Judaism	http://www.rac.org/
Social Action.com	http://www.socialaction.com
Spark: Partnership for Service	http://www.sparkpfs.org

APPENDIX C: YOUTH GROUP
TZEDAKAH PROGRESSIVE DINNER

This is a sample write-up for a youth group tzedakah program and can be adapted to multiple informal educational contexts. The point is that tzedakah is a valuable and easily programmed topic for informal settings.

In this progressive dinner program, participants will eat dinner in stages, traveling progressively from one course to the next, while learning about *tzedakah*.

GOALS:

1. To teach youth group members about the Jewish commitment to *tzedakah*.
2. To give youth group members an opportunity to engage in hands-on *tzedakah*.

OBJECTIVES:

At the end of the program, participants will be able to:

1. List the eight levels of the Rambam's Ladder of *Tzedakah* in order and be able to explain the rationale behind the order.
2. Explain the work of various organizations engaged in social justice work, including: UNICEF, *Mazon*, CARE, Oxfam, Hebrew Free Loan Society, Habitat for Humanity, United Negro College Fund, and Wardrobe for Opportunity.
3. Engage in direct *tzedakah* by making sandwiches for the homeless.
4. Discuss reasons both in favor of and against giving money to beggars on the street.

Station 1: Rambam's Ladder

Divide into groups. Each group will get a set of note cards with each of the eight steps of the *tzedakah* ladder. The group will place the cards into the order they think is correct. When they are through, the group leader will explain the correct order and lead them in a discussion.

- What insights do you have about the order that the *Rambam* suggests?
- What seem to be *Rambam* priorities?

Alternate activity: Divide into eight groups and give each group one of the eight steps and have them prepare a short pantomime skit that illustrates the step.

Supplies: appetizers, notecards, discussion question sheet with the correct order

Station 2: Ladder of Rambam, Cont. – Build a ladder

We will build a *Tzedakah* Ladder. Divide into eight groups. Each group will get a piece of wood that will become a rung in our ladder. On that piece, they need to write the type of *tzedakah* and paint pictures that represent it. (The long side boards can be left unpainted, decorated by staff, or assigned to participants.)

Supplies: rungs and side boards, paint, paintbrushes, bowls of water

Station 3: We need to work together

A. This is our salad station. We will have all the ingredients to make a salad: tomatoes, onions, lettuce, cucumbers, broccoli, peppers, etc. Everyone will need to help cut the different vegetables in order to help us make the salad.

B. We will eat our salad and have a discussion on how working together makes a difference in the world.

Supplies: veggies, knives, cutting boards, big bowl, bowls, salad dressing forks

Station 4: What can we do?

A. Each participant will get a Cup-A-Soup. On the bottom of each cup will be the name of an organization. Participants will divide into groups according to organization.



we'll hang these posters in the synagogue to teach congregants about these organizations.

Supplies: Cups-A-Soup, spoons, hot water, info on organizations, markers, fish posters

Station 5: Making a Difference! Sandwiches for the homeless

This is the dinner part of the evening. Each person will help make peanut butter and jelly sandwiches that will be given to a homeless shelter. Each person will make 5 sandwiches, put them in sandwich bags, and then back into the bread bags. Afterwards they will make an extra sandwich and that will be their dinner.

Supplies: peanut butter, knives, jelly, bread, sandwich bags

Station 6: What should Jews do about beggars on the street? (see Arthur Kurznei's essay "Brother, Can You Spare A Dime?" in Danny Siegel's Gym Shoes and Irises for information on this)

A. Participants fill out a survey on how they believe people should respond to beggars on the street. After they are done, they will divide into small groups and talk about the results.

B. We will then make *tzedakah* boxes out of Chinese food carry-out boxes. These boxes will remind us that not only can we give money to beggars, but we can also offer them our left-over food when we leave restaurants.

Supplies: surveys, pens, answer sheets for staff, white Chinese food take-out boxes, markers

B. Half of the group will have organizations that "give a man a fish" (UNICEF, Mazon, CARE, and Oxfam) by providing food assistance to the hungry. The other half will have organizations that "teach a man to fish" (Hebrew Free Loan Society, Habitat for Humanity, United Negro College Fund, and Wardrobe for Opportunity) by helping people become self-sufficient. After a brief introduction to this concept, each group will get a poster in the shape of a fish. The assignment is to create a poster that gives information about the organization. They must include: the name of the organization, what it does, and specific information about how people can help (address/ phone number for donations) and then they can illustrate it however they want. After the event,

Station 7: Havdallah (if it's a Saturday evening)

Notes

Service will incorporate stories about young people participating in *tzedakah* and social action (excerpts from *Chicken Soup for the Teenage Soul*, *The Kids' Guide to Social Action*, etc.).

Supplies: siddurim, juice, candle, matches, spice box

Station 8: Let's go fishing

A. Referring back to the proverb: "If you give a man a fish he will eat for a day, if you teach him to fish he will eat for a lifetime," we'll end the evening with a bunch of fishy activities: eating Swedish Fish and Phish Food Ice Cream, playing Go Fish and Fishin' Around, and listening to Phish.

B. Conclusion: Put the ladder together and hang it and the fish posters in the Youth Lounge.



APPENDIX D: SAMPLE FORMS

TEMPLE ISAIAH SEVENTH GRADE FUND FAQS

WHAT IS IT?

The Seventh Grade Fund is a charitable foundation run by the seventh grade class at Temple Isaiah in Lafayette, California. Each member of the class agrees not to purchase gifts for his/her classmates when they become *B'nai Mitzvah*. Instead, each family pledges \$200 into the Fund. (Financial participation in the project is voluntary, but all students are bound by the obligation not to give one another gifts.) In addition, the Seventh Grade Fund welcomes outside donations and pursues a modest fundraising campaign.

WHAT'S THE HISTORY OF THE SEVENTH GRADE FUND?

The Seventh Grade Fund was initiated by the seventh grade class of 1998-99. During its first year, the Fund awarded grants totaling \$16,500 to five organizations that provide services to children in need, including: Bay Area Young Positives, Big Brothers / Big Sisters of the East Bay, Center for the Education of the Infant Deaf, Elizabeth Glaser Pediatric AIDS Foundation, and Greater Bay Area Make-A-Wish Foundation. In 1999-2000, the Fund awarded grants totaling \$17,125 to four organizations that pursue medical research and treatment, including: American Heart Association, Diabetic Youth Foundation, San Francisco Community Clinic Consortium, and Susan G. Komen Breast Cancer Foundation. In 2000-2001, the Fund awarded grants totaling \$22,200 to five organizations that protect animals and the environment, including: American Society for the Prevention of Cruelty to Animals, Earthjustice Legal Defense Fund, Pets Unlimited, Valley Humane Society, and Voices for Pets. In 2001-2002, the Fund distributed \$17,500 to four organizations that work for human rights, including Human Rights Congress for Bangladesh Minorities, International Justice Mission, Association for Encounter Projects, and Free the Slaves/Anti-Slavery International.

WHO MAKES THE DECISIONS?

The Seventh Grade Fund Board of Trustees is comprised of all members of the seventh grade class (regardless of their families' financial participation in the program) and is advised by the seventh grade teachers and TAs and interested parents. All decisions of the Board are made by simple majority.

WHERE DOES THE MONEY GO?

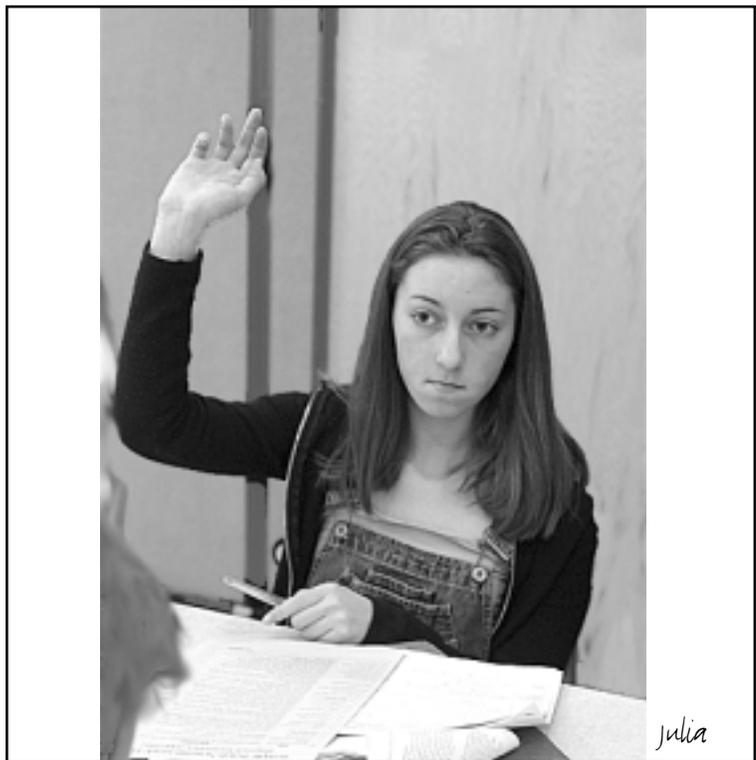
During its first meeting, the Seventh Grade Fund's Board of Trustees selects an issue upon which to focus its grant-giving activities. Each Board member takes responsibility for identifying several potential grant recipients to which Requests For Proposal and Applications will be sent.

WHAT ARE THE GOALS OF THE PROGRAM?

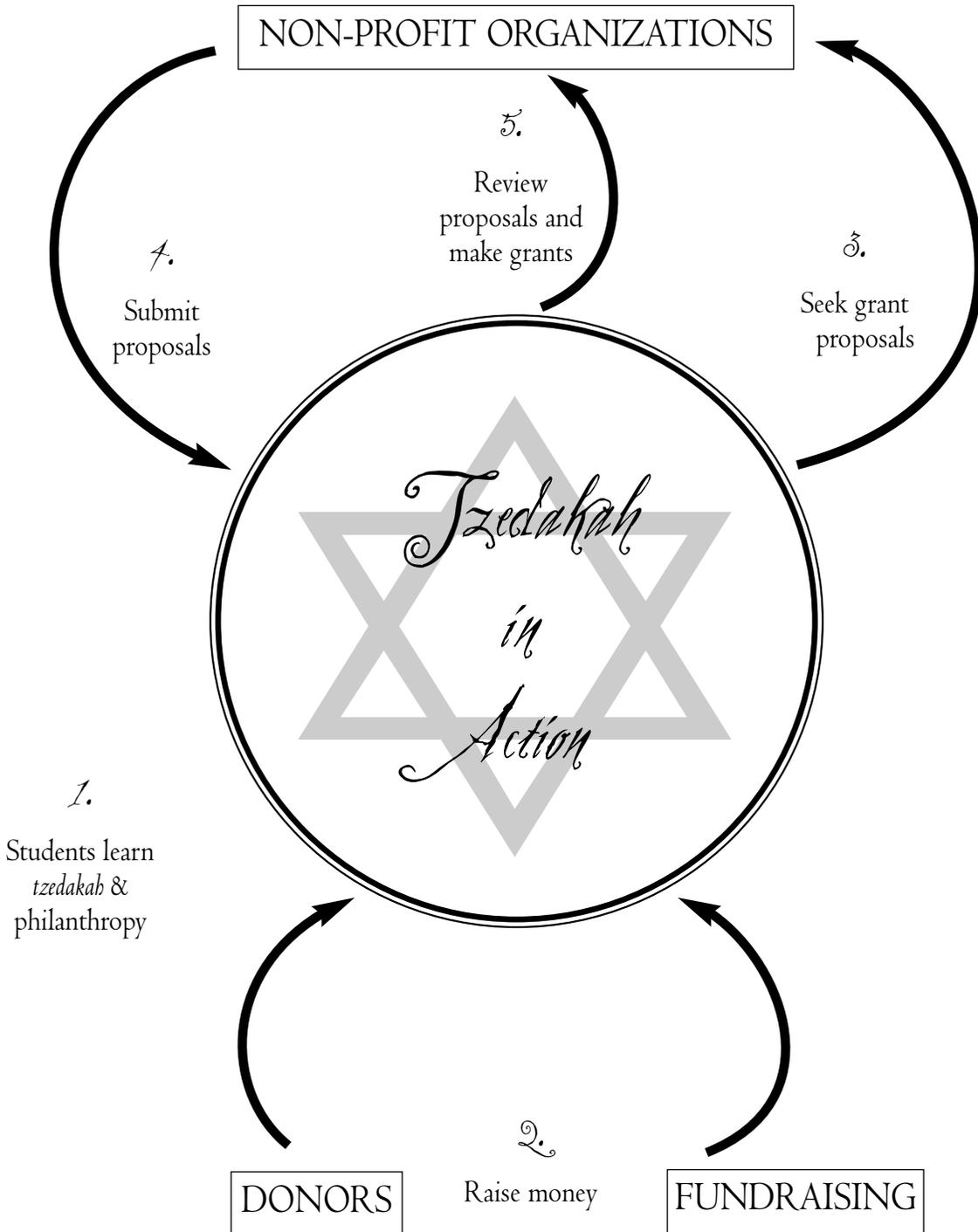
1. To educate students in the exercise of philanthropy, to encourage the practice of educated philanthropic giving, and to emphasize the value of *tzedakah* as an integral part of Jewish life.
2. To provide a concrete alternative to the materialism that is a large part of the *B'nai Mitzvah* experience in contemporary America and to relieve some financial pressure on families by agreeing (voluntarily and collectively) that donations to the Seventh Grade Fund will replace customary gifts to *B'nai Mitzvah*.
3. To provide targeted financial gifts to advance the cause of one or more local community service organizations.
4. To foster a sense of responsibility and effectiveness within the seventh grade community by giving them the power to effect positive change in the real world.

HOW WILL THESE GOALS BE ACCOMPLISHED?

1. A study unit on the history and practice of philanthropy and the *mitzvah* of *tzedakah* is an integral part of the curriculum. In addition, the students will prepare and distribute applications to potential grant recipients, review the submitted applications, and invite selected organizations to follow-up their applications with presentations before the Board.
2. The Fund will act as a vehicle for channeling financial resources away from consumption and toward social justice. It does not represent an additional expense, but instead, a redirection of family resources that would otherwise go toward the purchase of gifts.
3. Distribution of money from the Seventh Grade Fund will benefit one or more local community service organizations.
4. Every student in the class will have a role in raising money and deciding how that money will be distributed to organizations that foster positive change in our community.



How Tzedakah in Action Works





Four Hours of Babysitting (write neighborhood here)

Babysitter:

Estimated Retail Value: \$20

Minimum Bid: \$10

Bids Must Increase By At Least: \$1

Donated by

NAME

PHONE

BID

1

2

3

4

5

6

7

8

9

10

11

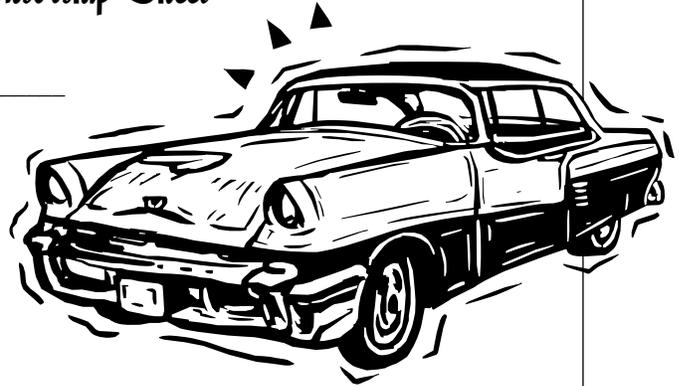
12

Tzedakah in Action Free Car Wash Sponsorship Sheet

Student's Name _____

Date _____ Time _____

Location _____



Please Choose One or the Other

Name					
Address					
Phone					
Pledge Per Car					
Flat Donation					
Total Due					
Total Collected					

Please make checks payable to: _____ All proceeds go to Tzedakah in Action,
our Jewish youth foundation. Pledge is per car washed by Tzedakah in Action.

TEMPLE ISAIAH SEVENTH GRADE FUND 2000-2001

Request for Proposals *[sample page]*

The Temple Isaiah Seventh Grade Fund is seeking proposals for projects that address the purposes described in this RFP.

GOALS: The Seventh Grade Fund is a private foundation created by the Seventh Grade class at Temple Isaiah in November 1998. Each academic year, our Board chooses an issue area upon which to focus our work. This year, our goal is to identify and support organizations that protect animals and the environment, while educating ourselves about the value of directed philanthropy. The primary focus of our giving will be local, but may include national and international projects.

ELIGIBILITY AND CRITERIA: Eligible organizations must have 501(c)(3) or other acceptable not-for-profit corporate status and must address the goals outlined above. Grant requests will be accepted up to \$5,000.00.

FUNDING DECISIONS: Funding decisions will be made by the Board of Directors of the Seventh Grade Fund. The Board is comprised of all ninety members of the Temple Isaiah's Seventh Grade Class of 2000-2001. Grants will be awarded during the beginning of May 2001.

PRESENTATIONS: Organizations making grant requests are invited and encouraged to make presentations to the Board of Directors at our meetings on Sunday, April 15th, Sunday, April 22nd, and Sunday April 29th, 2001. Please call Aaron Dorfman, Seventh Grade Fund Advisor, at (555) 555-5555, if you are interested in scheduling a presentation.

SUPPORT: The Seventh Grade Fund's grants are supported by donations from Temple Isaiah's Seventh Grade families, modest fundraising efforts, and additional gifts from individual donors.

DEADLINE: Grant proposals are due at Temple Isaiah by 4:00 pm on Monday, March 26th, 2001.

QUESTIONS: If you have any questions regarding this RFP or the Grant Proposal Format, please contact Aaron Dorfman, Seventh Grade Fund Advisor, at (555) 555-5555.

TEMPLE ISAIAH SEVENTH GRADE FUND 2000-2001

Grant Application *[sample page]*

Please use the following format to respond to the questions in no more than two typed pages (plus attachments – see below). Please remember that your proposal will be evaluated by seventh graders and should be written for their level of comprehension.

- 1) (a) Name, address, and telephone number of requesting organization.
 (b) Name of contact person.
- 2) Brief description of the organization (e.g. mission, goals, programs, people served, accomplishments).
- 3) Title of project and brief description.
- 4) Complete and detailed project budget and amount of grant request.
- 5) What are the specific activities that this grant will support? Include how the money will be spent, what work will be done, and the way that animals and/or the environment will be helped by this project. Also, please indicate whether this is an existing/ongoing program or a new project/program.
- 6) What specific goals and objectives do you expect to accomplish?
- 7) How do you intend to implement the program and in what projected timetable?
- 8) How does this project address the goals of the Seventh Grade Fund?

Please attach:

- 1) Verification of non-profit status.
- 2) You may attach supporting materials specific to your application.

Please return the application to: Temple Isaiah Seventh Grade Fund, Grant Proposal
 1234 Main Street
 Anywhere, CA 12345

TEMPLE ISAIAH SEVENTH GRADE FUND

Proposal Packet 1998-99 *[sample page]*

#	NAME	BRIEF SUMMARY	AMOUNT
1	Bay Area Crisis Nursery	Help to build group home for 6-10 year old children in unsafe or unstable family situations.	\$5,000
2	Bay Area Young Positives	Support full-time Member Services Coordinator for youth programs for HIV+ young people in San Francisco.	\$5,000
3	Big Brothers / Big Sisters	Support three new big brother / big sister mentoring matches in the East Bay.	\$4,500
4	Books for the Barrios	Send 1,000 cases of learning resources to the Philippines.	\$5,000
5	Buena Vista Tutorial Program	Support tutorial program to help children who are struggling with reading/comprehension in Contra Costa County.	\$4,872
6	C-Beyond	Support summer internship program to provide leadership training for ten low-income teens in Concord.	\$4,000
7	Center for Access to Resources and Education	Support program to help siblings of children with special needs live with their siblings in Contra Costa County.	\$4139
8	Center for Human Development	Expand computer lab at After School Program in North Richmond.	\$5,000
9	Center for the Education of the Infant Deaf	Purchase equipment/toys to help teach deaf children and their parents new skills.	\$1,000
10	Children's Hospital Oakland	Support technical computer upgrade in Hospital School Program.	\$4,831
11	Contra Costa Crisis Center	Support grief counseling for children and teens mourning the loss of a loved one.	\$2,000
12	Jewish Family and Children's Services – Project Ezra	Support social services for the Jewish poor.	\$5,000
13	Justin Grosso – Leukemia Society of America	Sponsorship of Justin Grosso for marathon to raise money for Leukemia Society of America.	\$2,000
14	Make-A-Wish	Support one wish for a terminally ill child.	\$5,000
15	Na'amat USA	Social services for women, children, and families in Israel (primarily through daycare).	\$5,000
16	Northern California Family Center	Purchase management software for runaway and homeless youth programs.	\$1,495
17	Pediatric AIDS Foundation	Fund immediate unmet needs of HIV+ children and their families.	\$5,000
18	Pediatricare	Provide emotional and practical support to families living with illness, death, or other trauma.	\$5,000
19	Project Pride	Provide outings from a residential substance abuse treatment facility for women and their kids in Oakland.	\$4,000
20	Quilombo	Support Making Change program – youth-directed grant-making in West Oakland.	\$5,000
21	Starlight Children's Purchase Foundation	"Fun Center" to provide entertainment to hospitalized children.	\$3,000
22	Streetcats Foundation	Support Teen Surfer – inner-city free-access after-school computer center for at-risk and under-served youth in Oakland.	\$5,000
TOTAL REQUESTS			\$90,837

TEMPLE ISAIAH SEVENTH GRADE FUND

1234 Main St. • Anywhere, CA 12345 / (555) 555-5555 • FAX (444) 444-4444

May 11, 2001

Board of Directors

NOTE: This section actually contained a full list of the names of all of the students in the class. It was a great way to make them feel official.

«Address1»
ATTN: «FirstName» «LastName»
«Address2»
«City», «State» «PostalCode»

Dear _____,

On behalf of the Board of Directors of the Temple Isaiah Seventh Grade Fund, I am pleased to inform you of the award of a grant of \$_____ to _____ for the specific purposes outlined in your grant application.

Thank you very much for your grant request to the Seventh Grade Fund. Yours was one of many very worthy proposals received by the Board during this grant cycle. The education we gained by being part of this project was greatly enhanced by your participation. We appreciate the seriousness with which you approached your proposal and the respect you offered us as young people.

The Board of Directors of the Seventh Grade Fund is interested in maintaining a relationship with your organization during this grant period. Please send a brief narrative summarizing the accomplishment of goals set for this grant proposal no later than September 30, 2001. Feel free to include any attachments which will help to clarify information included in the report or which will enable the Board to maintain its personal connection with your work.

We would like to make one additional request. Each year, in the Fall, the seventh grade class votes on whether or not to reconstitute the Seventh Grade Fund for that academic year. It has proven helpful to have past Seventh Grade Fund grant recipients speak about their experience with the program before the class votes. We may contact you in the Fall about speaking at a meeting and would greatly appreciate your help with this process.

Upon receipt of a signed copy of this letter, indicating your acceptance of the terms of the grant, we will forward to you a check in the amount indicated above. If you have any further questions, please feel free to contact me at (555) 555-5555. Thank you very much.

Sincerely,

Aaron Dorfman
Seventh Grade Fund Advisor

RECEIVED:

Signature

Date

[sample letter]

TEMPLE ISAIAH SEVENTH GRADE FUND

1234 Main St. • Anywhere, CA 12345 / (555) 555-5555 • FAX (444) 444-4444

Board of Directors

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May 11, 2001

«Address1»
ATTN: «FirstName» «LastName»
«Address2»
«City», «State» «PostalCode»

Dear _____,

Thank you very much for your grant request to the Seventh Grade Fund. Yours was one of many very worthy proposals received by the Board during this grant cycle. The education we gained through this project was greatly enhanced by your participation. We appreciate the seriousness with which you approached your proposal and the respect you offered us as young people.

Unfortunately, we received requests that greatly exceeded our financial means, and we are not able to meet your request at this time. We wish you the best of luck in pursuing your valuable work. Thank you very much.
Sincerely,

Aaron Dorfman
Seventh Grade Fund Advisor

[sample letter]

Yesterday I received an elated phone call from a thirteen-year-old student. She was attempting to describe the happiness and satisfaction she felt, having just returned from a meeting at which she donated a portion of her *Bat Mitzvah gelt* to a project that reaches out to Jewish teenagers and young women who are in abusive relationships or at risk for abuse. “I was thinking, wow, this is totally awesome, this is really cool,” she said.

She had called me from a car on her way from a meeting at the offices of *Shalom Bayit*. *Shalom Bayit* is a Jewish women’s task force on domestic violence, and is one of the organizations that applied for a grant from the Temple Isaiah Seventh Grade Fund (Temple Isaiah’s *Tzedakah in Action* foundation).

Rachel took part in the Seventh Grade Fund along with a more than seventy of her peers. She remembered *Shalom Bayit* as one of the organizations that had appealed to us for funding, and turned to them after her *Bat Mitzvah*. She had decided to donate 18% of her *Bat Mitzvah gelt* to this organization — which, she said in serious tone of voice, “is really, really a lot of money.” (Eighteen is the numerical value of the Hebrew word *Chai*, or “life.”)

“I felt empowered in a special way... my parents didn’t make me or force me to do it — I did it all on my own!” Attempting to describe the powerful feeling the act of *tzedakah* had given her, Rachel went on to say, “I was happy and they were happy, because I had just helped a lot of people.”

After having coordinated the program described in this book, I understand exactly the feeling that Rachel was describing. It was of a certain synergy that occurs when true *tzedakah* is in action. Both the receiver and the giver of *tzedakah* know that good is going to be done in many places because of what both parties are doing: the joy is staggering and beyond words. It was a simple act of *tzedakah*, but it changed and touched lives.

Before having actually taken leadership of the program, I knew that *Tzedakah in Action*, as coordinated by Aaron Dorfman and described in this book, was very well-organized and profound. It is only after I implemented the program and experienced it for myself that I understand the powerful, and seemingly magical impact it has on the students and countless others. To varying degrees, it has had a powerful effect on the non-profit organizations involved, the students, the teaching staff, Temple Isaiah member families, and I don’t know how many people and places in our community and around the world.

This year’s Seventh Grade class was once known for being particularly reluctant, self-absorbed, and skeptical. Towards the end of the year, I watched in fascination as a complete transformation took place right before my eyes. Seventy twelve- and thirteen-year-olds sat down in a U-shaped Board of Directors-style room arrangement, with packets of proposals, evaluation sheets, and pens, listening intently to presentations, raising their hands and asking extremely intelligent questions. The presenters who traveled from as far away from Washington, D.C. were amazed at the spectacle of dozens of

pre-teens empowered with great responsibility — and tens of thousands of dollars — and every single one of them living up to the task. I was and am still very impressed.

The class had chosen to seek out human rights organizations for funding. The thousands of dollars we distributed as grants as part of this program could have been spent on expensive gifts, but the vast majority of students agreed to forfeit them and send a \$200 donation into the Seventh Grade Fund. Now, instead of being spent on clothes, toys, CDs and gift certificates, this money will free slaves in India, educate thousands about worldwide slavery, bring an urgently needed beacon of peace to Israelis and Palestinians amidst a tragic ongoing war, and save lives in Bangladesh.

To outsiders, the life-saving work done with the money may seem to be the most tangible effect the Seventh Grade Fund had this year. But those who experience the program know that its benefits are never-ending. It began when the first students began to appeal to me, saying, “But isn’t there a way we can raise more money?”

It continued when individual students handed me checks in the triple digits taken from their own *Bar* and *Bat Mitzvah gelt*, and when students like Rachel went out of their way to make the world a better place. The students left the program with a new set of values and priorities that puts paramount importance on *tikkun olam*. They will wake up every morning of every day knowing there is something they can do to help. We have set up a small but powerful force for good, which I am confident is eternal.

The program requires a lot of thought and some tedious administrative work. While considering the grant proposals, we dealt with some quite difficult and heart-breaking issues that were difficult for anyone, let alone Seventh Graders, to think about. My classes spent many long hours studying grant proposals that were often wordy and hard to understand. These are the only possible downsides I can think of to carrying out this program. These downsides are insignificant. The payoff is tremendous, exponential, and life-changing.

I urge you to never doubt the viability of this program, for from this moment on, doubt and hesitance are the only things keeping you from implementing it in your community.

In *Pirke Avot*, Rabbi Tarfon taught, “It is not up to you to complete the task, but you are not free to desist from it.”

We have not yet repaired the world. There is a lot of work to do, and within Rabbi Tarfon’s teaching is the commandment to go out of our way to make the world a better place. This is the commandment to learn about the injustices and imperfections of this world and do what we can to alleviate them, rather than pretending they don’t exist or worse, acknowledging that they do exist and pretending there’s nothing we can do about them.

My seventh grade class has just heard that commandment and has spent the year fulfilling it not just by studying *mitzvot* and *tzedakah*, but by actively performing them — for the study would be meaningless without action. This is Jewish praxis; this is *Tzedakah in Action*.

— Gabe Salgado, June 2002

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