

World Council of Jewish Communal Service
“Building a Strong Jewish Future in a Changing World—The Role of the Professional”

**An Innovative Approach to Meeting a Critical Community Need by Engaging the Next
Generation of Jewish Leaders: The CJP Disabilities Housing Initiative and the Real
Estate Next Generation Group**

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The Hebrew phrase, *l'dor v'dor*, meaning *from generation to generation*, has long been a rich and integral part of Jewish culture and tradition. This core Jewish principle has been responsible for the preservation of Judaism as a religion and as a culture throughout history. Whether through the efforts of parents and grandparents, rabbis, or Jewish communal institutions, traditions, observances, beliefs, and values have always been passed down from generation to generation. As Jewish communities and the younger generation of Jews continue to evolve over time, putting into practice the notion of *l'dor v'dor* will become an even more critical issue that will require creative responses from the organized Jewish community.

This article proposes that the Jewish community, through its creative engagement with the next generation, can indeed achieve more collaborative efforts in the community and can raise more money from the Jewish leaders of tomorrow, who are closer to us than one might think. Jehuda Reinharz (2005), president of Brandeis University, writes that the next generation of Jews “who give to Jewish causes prefer to select the cause that interests them, rather than giving to umbrella organizations like the Jewish federations. ... They want to be directly involved in the projects they support.” Although it may be the case that the next generation of Jews prefers to connect to the Jewish community through a specific interest area, Combined Jewish Philanthropies of Greater Boston (CJP), the Boston Jewish Federation, has found that, by directly involving younger Jews in specific projects, it is possible to engage them in the concept of umbrella giving. The CJP Real Estate Next Generation Group is a targeted response to this interest in participatory philanthropy observed in the younger generation of philanthropists.

In addition to its efforts to engage the next generation, CJP has had as one of its priorities the creation of an inclusive community for people with disabilities. For members of our community with disabilities and their families, no problem looms as large as the need for safe and appropriate housing. CJP, through its Disabilities Housing Initiative (DHI), has created partnerships with a wide range of communal agencies, including Boston’s Jewish

Family & Children's Service (JF&CS), community organizations, real estate developers, and caring donors to create homes for people in our community with disabilities. CJP has also committed to raise the capital support within the Jewish community to create affordable, high-quality housing with wrap-around supportive services and Jewish community connections for people with disabilities, setting an initial goal of \$4 million.

This article discusses CJP's model of engaging the next generation of leaders through their participation in implementing an important CJP community initiative. With one project, CJP is achieving two strategic goals – helping address a critical community need and engaging the next generation of community leaders. The synergy of these two components has enhanced and strengthened the other parts of the DHI, achieving stewardship, programmatic, and philanthropic success.

CJP Disabilities Housing Initiative: Identifying and Meeting a Critical Community Need

The Jewish community nationwide has long taken a leadership role in developing senior housing, including housing for elders with physical disabilities. CJP and its community constituents felt strongly that a new emphasis should be placed on assisting younger adults with disabilities in need of permanent, high-quality, affordable housing in community-based settings, and, further, that this housing should offer residents a strong connection and access to Jewish life, culture, and practice. In 2003, CJP, acting within its culture of spearheading new and innovative communal initiatives, launched the CJP Disabilities Housing Initiative, a community-wide effort to increase the number of housing units for people with disabilities in Greater Boston. To best achieve the goals of DHI, CJP partnered with Jewish Family & Children's Service, which already had a record of achievement in the disabilities arena.

Defining the Need and Developing a Strategy

In 1999 CJP established the Committee on Services to People with Disabilities; its mandate was to develop a strategic, integrated approach to creating an inclusive community for Jews with disabilities. The committee sought to respond to an ever-increasing need, diminishing public resources, and sentiments of anger and frustration from parents and concerned community members that the Jewish community was not providing sufficient resources for members of the community with disabilities. It determined that three major priority areas required immediate and focused attention: special education, inclusion, and housing.

In 2002, CJP and the committee commissioned Eleanor White, president of Housing Partners, Inc., a nationally known housing consulting firm, to identify the need for housing for Jewish people with disabilities in Greater Boston and develop an action plan to address this need. Working with a volunteer committee of experts in housing and support services, as well as with parents of adult children with disabilities, White conducted an extensive environmental scan of existing programs, interviewed scores of people, and visited a wide variety of supportive housing developments.

The resulting action plan was based on these research findings (White, 2002):

- At least 5,000 people with disabilities in the Jewish community will require housing during their adult lives. In addition, an “invisible population” of people with disabilities aged 25- 50 who are currently living at home will need community-based housing in the very near future when their aging parents are no longer able to care for them.
- Between 140 and 150 requests for housing placements for people with disabilities are made each year.
- At the time of the study, the Jewish community supported 28 units of housing for people with disabilities.
- Many people with disabilities and their families are not aware of their eligibility for government funding for housing or support services.

The provision of housing and supportive services for people with disabilities is an enormously complex and expensive undertaking, involving issues of clinical degrees of disability, individual preferences in living situations (including location, housing type, and ownership type), staffing requirements, extent of Jewish programming, and the availability of funding to cover the cost both of real estate and the long-term provision of services. CJP leadership also felt strongly that efforts should be directed to people with a range of disabilities, including developmental and cognitive disabilities, chronic mental illness, physical disabilities, and autism spectrum disorders. Further, CJP’s leadership was determined to face this challenge in the nation’s most expensive housing market at a time when state and federal resources and benefits entitlements were shrinking (Heudorfer & Bluestone, 2005).

The strategic action plan concluded as follows: “Given any realistic assessment of the production we can hope to achieve in the coming years, we think it is clear that the need is overwhelming compared to the Jewish community’s capacity to produce new housing units for the disabled in the near future.” Faced with this challenge, CJP and the newly formed Housing Implementation Advisory Committee decided to pursue this initiative full speed ahead.

Implementation, Collaboration, and Success

The action plan specified four key objectives in the creation of new housing opportunities for people with disabilities and building the capacity of CJP and its agency partners.

1. Create housing over the next 5 years sufficient to serve 50-175 individuals across the spectrum of clinical need, from the mildly disabled to those who require significant service supports.
2. Ensure that social service programs that support and empower people with disabilities and their families are coordinated with the housing.

3. Advocate for increased public support for people with disabilities, including funding for housing and programs that empower and support them.
4. Hire a professional for this initiative with specific and extensive experience in the development of affordable and supportive housing.

To achieve these objectives, CJP set a goal of raising \$1.25 million to support DHI's activities for 5 years. This money was quickly raised from 11 generous individuals, family, foundations, and nonprofit foundations.

DHI provides funding for community outreach, intake and other clinical services, family support and education, a full range of social and educational programs, and for a highly experienced professional staff member. The Director of Housing is responsible for developing and implementing its strategic direction, directing the program, and creating housing through a variety of means and with a variety of partners.

CJP's essential role in DHI is to act as a catalyst and to establish partnerships to develop housing by working with other agencies both within and outside the Jewish community. DHI is housed at CJP and is spearheaded by a professional with many years of experience in the development of affordable housing. In collaboration with key partner agencies including Jewish Family & Children's Service, the Jewish Community Relations Council, Jewish Vocational Service, and the Jewish Community Centers of Greater Boston; other service providers; grassroots organizations; government agencies; private donors; and the real estate community, CJP now develops a variety of housing alternatives to suit the full range of needs of Jewish people with disabilities.

JF&CS has been integral to the success of DHI. More than 15 years ago, JF&CS began the Community Housing for Adult Independence (CHAI) program. CHAI laid the groundwork for DHI by developing a model for high-quality supportive housing for adults who seek to live independently in their own homes or in small group living situations. CHAI's person-centered approach is best expressed in this statement by Dr. Seymour J. Friedland, executive director of JF&CS: "At JF&CS we have a philosophy of supporting the whole person. We not only provide food and shelter, but relationships, meaningful experiences, and the opportunity to be part of the larger community." CHAI serves as both a model and the base from which DHI has grown.

DHI, now in its fourth year, has achieved many successes, including the following:

- Raised \$1,250,000 from 11 donors to underwrite DHI for 5 years.
- Raised an additional \$2,000,000 to date to support the capital costs of disabilities housing.
- More than doubled the number of housing units for people with disabilities, from 28 to 65 units
- Leveraged \$14,000,000 in public funding through our support for disabilities housing
- Created eight new extremely affordable apartments for people with chronic mental illness.
- Provided intake and screening programs for 140 consumers and their families
- Provided family education activities attended by 350 people
- Provided social activities attended by 500 people
- Published the "Family Education Workbook," a step-by-step planning guide for families of people with disabilities

- Created “Preparing for Independence,” a program that helps people with disabilities learn the skills they need to live on their own or in a supported living environment
- Met a \$200,000 funding goal for the Next Generation Venture Fund, a critical source of predevelopment capital for new housing
- Secured the involvement of 11 members of the CJP Real Estate Next Generation Group in developing the Bea Winn House for five residents with developmental disabilities; the Next Generation Group is now developing an eight-unit property for people with Asperger’s syndrome and autism spectrum disorders

New Models of Collaboration

One of the major accomplishments of DHI has been its collaboration with the CJP Real Estate Next Generation Group, a cadre of young volunteer leaders with expertise in the field of real estate development. Its members are the adult children of important community leaders who have a history of significant philanthropy in the Jewish community. As noted above, members of the CJP Real Estate Next Generation Group developed DHI’s first group home for people with developmental disabilities. This new model of collaboration demonstrates how a strategic response to meeting a critical community need also developed into the creation of a new model of engagement for young community leaders.

The CJP Real Estate Next Generation Group: From Innovation to Success

In recent years, Jewish Federations across North America have struggled with how to engage the next generation of committed and involved Jews in our Jewish community. Most Federations have approached this issue through the establishment of young leadership divisions, leadership development programs, young affinity or professional-based activities, and young leadership missions to Israel. For the most part, these efforts have proven to be relatively effective in engaging the next generation in the organized Jewish community, as well as in creating future annual campaign donors.

However despite these efforts, most Jewish Federations are not structured or focused on engaging the next generation of top Federation leadership. Jewish Federations have historically focused their efforts on the Annual Campaign, raising funds from donors each and every year in support of local, national, and international Jewish community needs. Given the importance of the Annual Campaign, Jewish Federations have traditionally focused their professional staff on a one-year donor development plan. Typically, each year the staff is charged with closing each donor’s annual gift and working with the leadership on events or programs with the goal of raising more annual dollars. What rarely happens is a long-term development approach that creates relationships between individual donors and a professional development officer.

Much has been written on the concept of innovation. In the article, *Innovation DNA*, Ruth Ann Hattori and Joyce Wycoff (2002, p. 25) write, “Teams are the center of innovation activities.” In addition, organizational culture “creates the playing field for actions, transactions, and interactions of business and the pursuit of innovation. An environment that’s flexible and empowering and that welcomes ideas, tolerates risk, celebrates success,

fosters respect, and encourages fun is crucial to innovation” (Hattori & Wycoff, 2002, p. 28). From the top down, CJP encourages innovation and change by making it the norm. Collaborations between and among professional staff, particularly in the Planning and Development Departments, as well as collaboration between staff and volunteers, are integral to developing innovative strategies to solve issues and raise funds that have an impact on our communal priorities.

The CJP development officer who worked with donors and donor-prospects within the real estate profession pushed the idea of creating a volunteer team of young, influential, and high-capacity individuals that would become involved in a hands-on project within CJP. The development officer created a strategy for the newly formed group as well as for each individual member, focusing on four intersecting critical components: leadership involvement, relationship building, donor cultivation, and philanthropy. The development officer initiated a conversation with the son of one of CJP’s most important donor families and discussed getting involved in CJP. This young man eventually became the leader of the CJP Real Estate Next Generation Group. In conversations with him, it was clear that he wanted to be involved in something tangible, meaningful, and hands-on.

Drawing upon this young real estate developer’s peer group and other relationships that CJP staff had developed with high-capacity young real estate professionals, about a half-dozen other young real estate professionals were invited to a meeting in May 2003 that was held at the office of the then-incoming Annual Campaign co-chair, one of Boston’s most prominent real estate developers. All in their 20s and early 30s, those present were members of CJP’s wealthiest and most involved donor families. Most members come from families with long established ties to both philanthropy and real estate in the Greater Boston Area. Many worked in real estate development with their families, whereas others worked independently in the field or related fields. At that initial meeting, the common thread among all of the young real estate professionals was the desire to do something good for the Jewish community using their professional skills and expertise.

In early discussions with the group, many members felt strongly that they did not want their participation to involve only raising money. From CJP’s perspective, this was acceptable because of its commitment both to engaging the next generation and to a long-term development approach. One member of the group stated, “We wanted to try a different kind of charity work, something beyond writing a check. Our parents had done some pretty great stuff, and we wanted to do something to follow” (Ravgalia, 2005). What ensued was the synergy between the energy and excitement of these young next generation real estate professionals and the goals of DHI.

Partnership, Cultivation, and Innovation

When the CJP Real Estate Next Generation Group held its first meeting in May 2003, DHI was just getting underway. In subsequent monthly meetings, the group tackled a number of issues related to their involvement in developing affordable housing for people with disabilities, including the following: defining their role and what they wanted to do, learning more about the need for disabilities housing, educating themselves about affordable housing, exploring financing mechanisms, and determining how best to work with CJP and partner agencies. Emphasis and effort were placed on educating these young leaders about the role of CJP and Jewish Family & Children’s Service in the Jewish community. Guest speakers were

on the agenda for these early meetings. Topics presented included information on various disabilities and developing and financing small-scale affordable housing using both public and private resources.

During the course of the group's first year, it established an easy camaraderie and developed a reputation of credibility and importance within CJP on both the lay and professional levels. A key decision made by the CJP development officer early on was to directly involve top CJP leadership in the real estate profession in the group's work. The group's first meetings were held at the offices of some of Boston's premier real estate developers. It is significant to note that the culture of CJP allows a development officer to approach one of CJP's highest-capacity donors (most notably the current CJP Board Chair) and leadership to involve them directly in new and innovative ventures, such as the CJP Real Estate Next Generation Group. This ultimately paid off, as the first group home to be developed was funded and named by the real estate developer asked to host one of the group's initial meetings.

There was some concern that members of the group would lose interest as it arduously searched for several months for a property for people with disabilities in a very difficult real estate market. There were also several unresolved concerns at the beginning of the process, such as where the money for the down payment would come from and who would sign the legal documents. Rather than becoming obstacles, these challenges were overcome by a team effort. This effort resulted in the decision to establish the CJP Next Generation Housing Foundation, Inc., a supporting foundation of CJP and a non-profit, 501(c)(3) legal entity that enabled the Group to achieve its goals.

It was clear that for this innovative collaboration to succeed, a "hands-on" development approach had to be used. The importance of meetings with each participant cannot be understated. In addition to providing an opportunity to discuss disabilities housing matters, individual meetings provided a great opportunity to inform and engage these young leaders in a number of CJP community priorities, as well as to discuss and ask for support for the CJP Annual Campaign. These meetings also enabled these young philanthropists and volunteers to voice their concerns and ideas, provide feedback, and forge a key relationship to the CJP development professional and by extension to CJP.

The CJP development officer acted strategically in cultivating this group of young leaders, working to create a specific strategy for each individual member based on his or her current level of involvement in CJP and participation in the Annual Campaign. As time passed, efforts were made on an individual basis to engage the group members within the appropriate professional affinity team (the Real Estate, Construction, & Design Team). Some members chaired affinity team events, such as the Real Estate Market Update Event or the Real Estate Building Tour Event. Other members were asked to chair the CJP Annual Meeting and participate in CJP's premier leadership development program, the Acharai Program. Team members were encouraged to participate in CJP Israel missions as a means of underscoring the importance of our relationship with Israel and our sister city, Haifa.

CJP's philosophy of donor-centered cultivation, leadership development, and fostering an environment of innovation and change led to the creation of the Next Generation Venture Fund—a revolving loan fund for property acquisition. The strong relationships forged since the inception of the group proved critical in achieving success during the personal

solicitations for gifts to the Next Generation Venture Fund. Many Next Generation group members made gifts to the Venture Fund over and above their Annual Campaign support, and for others, this contribution was their first-ever gift to CJP. For some, participation in the group resulted in increased support for the unrestricted Annual Campaign. Group members offered to reach out to other key real estate developers to encourage them to support their efforts by contributing to the Venture Fund. The Next Generation group exceeded its Venture Fund goal of \$200,000 in March 2006.

Particular attention was devoted to maintaining a level of exclusivity and prestige for the CJP Real Estate Next Generation Group, which was critical both in maintaining group members' interest and in achieving success. There are 11 members of the group, all with expertise in real estate, ranging from law to design to construction and financing. From time to time, CJP would highlight the work of the CJP Real Estate Next Generation Group in remarks made at real estate affinity campaign events, which generated a great deal of interest in the group. Once the group identified and purchased its first property – a single-family house to be used as a group home for adults with developmental disabilities – CJP worked with a public relations firm to pitch the CJP Real Estate Next Generation Group's story to the *Boston Globe*. This effort resulted in a lead article on the front page of the *Boston Sunday Globe* real estate section.

Under the guidance of the Director of Housing, each member of the team took on one or more aspects of the real estate development process. Team members worked in collaboration with one another, the CJP development professional, the Director of Housing, as well as outside entities such as elected officials, banks, and community organizations. Many wanted to participate and were turned away from the team simply because, to get the job done, a small, hands-on group was needed.

Although the CJP Real Estate Next Generation Group functions as a team, particular attention was placed on creating a leadership development plan for each individual member. Recognition was given in the form of framed *Boston Globe* articles, and individual members were featured in Annual Campaign e-mail newsletters, CJP development newsletters, leadership awards presented at the CJP Annual Meeting, and Campaign Closing events, to name a few.

Conclusion

CJP, the CJP Real Estate Next Generation Group, and Jewish Family & Children's Service share one goal: the creation of a caring and inclusive Jewish community. The specific outcome of our common goal has been significant growth in the number of housing units and programs serving people with disabilities. Through collaboration and innovation, we are meeting a critical community need.

- *Interdepartmental collaboration:* Collaboration between the Planning and Development Departments (the Director of Housing and the Major Gifts Officer) was critical to the successful synergy among DHI, JF&CS, and the CJP Real Estate Next Generation Group. The two CJP professionals understood and respected each others' goals, even though at times their goals were very different: on the one hand, the production of housing, and on the other, the engagement and cultivation of the next generation of volunteer Jewish leadership. This cross-collaboration is also an example of an emerging trend in Federation work—the intermingling of the interests of planning and development that results both in making a stronger case to donors and in

a more effective ability to plan successful community initiatives. As designated giving emerges as an ever-increasing trend and interest among the younger generation of donors, organizations like CJP must determine how to achieve their missions in new and innovative ways. CJP encouraged the collaboration by investing in highly qualified professional staff with substantial expertise in and commitment to their respective fields and by creating an atmosphere where innovation and new ways of thinking are encouraged.

- *Collaboration between professional staff and volunteers:* CJP and its professional staff take the long view in efforts to engaging the younger generation, in particular with those younger Jews with significant financial capacity and leadership potential. A tremendous amount of time and energy has been invested in this effort with excellent results to date and the anticipation of significant results in the future. Through innovative techniques in donor cultivation and stewardship CJP has galvanized a new cadre of future leaders.
- *Collaboration between a Federation and a JFS:* With the shared goal of expanding housing for people with disabilities, two Jewish communal agencies that are dynamic and flexible, CJP and Jewish Family & Children's Service, worked together, surmounting the usual turf and funding issues. Each organization concentrated on its own area of proven expertise (JF&CS in supportive services and programming and CJP in organizing community partners and in real estate development) to achieve a whole greater than the sum of its parts.

Is this a model that can be replicated in other communities? The answer is a resounding yes. Collaboration between partners with a shared goal is a model that can be accomplished by any size organization. By concentrating on each partner's specific areas of expertise, by taking risks especially in the area of long-term cultivation of donors, by combining resources and information across departments and agencies, and by matching critical community needs with donor's interests in a strategic way, success is likely, even for complex community needs.

The DHI has garnered considerable support over the past four years due to its many successes. As a result, CJP leadership foresees including the CJP Disabilities Housing Initiative in the annual allocations process after the initial underwriting period ends. The future of the CJP Real Estate Next Generation Group also looks bright. It is in the process of developing a shared living property for people with Asperger's syndrome and autism spectrum disorders. This has proven to be a particularly challenging project because very little public funding is available for this range of disabilities. Beyond that, we suspect that most members of the group will continue to work together on a third project. We are confident that even those who do not choose to continue in the group will continue to be connected to CJP and the Jewish community in the future.

As the oldest Jewish federation in North America, CJP prides itself on a reputation of over 110 years of creating a community of learning, caring, and social justice—a community based on the traditional Jewish principles of *Torah, Tzedek, and Gemilut Chasadim*. DHI and the CJP Real Estate Next Generation Group, in partnership with Jewish Family & Children's Service, have had a tremendous impact on creating a caring community through the development of high-quality affordable housing for people with disabilities. This story is one of collaboration and innovation. But just as important, it is the story of how a Federation, a

JFS, professional leadership, and volunteer leaders, with their combined strength and commitment, have helped all members of our community live full and independent lives.

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