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## Study of Jewish Planned Giving Suggests Charities Are “Leaving Millions on the Table”

*Latest Data Release from Nationwide Study “Connected to Give” Finds Jews More Likely To Have Wills and Charitable Bequests, Significant Opportunities Exist for Cause-Based Fundraisers*

(Los Angeles, CA—October 10, 2013) Jumpstart released *Connected to Give: Jewish Legacies* today, the first in a series of topical reports based upon the wealth of data from the National Study of American Jewish Giving, a survey of nearly 3,000 American Jewish households.

“Too many of us in philanthropy think of a charitable bequest as a conclusion to a lifetime of giving,” said co-author Dr. Shawn Landres, co-founder of Jumpstart, the philanthropic research and design lab that spearheaded the project. “This report teaches us that it’s time to start thinking of it as a beginning.”

“Planned giving” refers to charitable contributions pledged through provisions in wills or estate planning documents. *Connected to Give: Jewish Legacies* compared Jews on all sides of planned giving – those with and without wills, those whose wills do and do not contain provisions for charitable bequests, and those whose charitable bequests do and do not include Jewish causes.

“For any organization that doesn’t yet have a planned giving program, this report should spur them to create one,” said Lisa Farber Miller, Rose Community Foundation’s Jewish Life senior program officer. “For any organization that does have one, this should push them to broaden it beyond the likely prospects: older and wealthier donors. Not only is there room to grow by asking middle-income, younger donors, and long-time donors who give consistent, smaller gifts for charitable bequests, but when we do, we strengthen our relationships with them for a lifetime of giving.”

Kate Conn, CEO of the Harold Grinspoon Foundation, noted the risks of inaction. “Organizations are leaving millions of dollars on the table by not placing planned giving front and center in their philanthropic efforts,” she said. “The data upends any concern that asking for a planned gift might make donors shy away from regular giving. In fact, donors with charitable bequests give more at every level.”

Marjory Kaplan, President and CEO of the Jewish Community Foundation of San Diego, agreed. “Planned giving is one of the most powerful tools donors have,” she said. “These gifts ensure the continuity of their Jewish values through the organizations they care most about.”

The findings bear out a theme established in the previous report, *Connected to Give: Key Findings*, that Jewish social engagement drives charitable giving to non-Jewish and Jewish causes alike. “Planned givers tend to have moderate to high social engagement with the Jewish community,” said Dr. Landres. “They show up at services, they’re building a family in their faith. Our findings tell us that organizations

concerned about long term financial sustainability ought to start with two questions: first, are they nurturing Jewish connection among their most important prospects? And second, are they talking with their most loyal current supporters about their legacies?”

### BY THE NUMBERS

Among the many findings in *Connected to Give: Jewish Legacies* is that...

- 74% of the study's Jewish respondents have a will...
  - ...of whom 32% (23% of total) included a charitable bequest
- compared to 60% of non-Jewish respondents who have a will...
  - ...of whom 20% (12% of total) included a charitable bequest
- A large majority – 66% – of respondents whose wills include a charitable bequest have a bequest to a Jewish cause
- 45% of respondents who belong to Jewish organizations are planned givers, compared to 15% of non-members, reinforcing the main “Connected to Give” argument

*Connected to Give* draws on the National Study of American Jewish Giving, the National Study of American religious giving (nearly 2,000 households from other religious groups), a major comparative study of religious, ethnic, and other community-based giving circles, and a series of focus groups. The next in the series of *Connected to Give* reports, expected in late November, will focus on charitable giving by different faith communities in America.

*Connected to Give* is funded and led by a national collaborative consortium of more than a dozen independent, family and community foundations and organizations. New funders are continuing to join the effort; current partners include Andrea & Charles Bronfman Philanthropies, Max M. & Marjorie S. Fisher Foundation, Emanuel J. Friedman Philanthropies, Harold Grinspoon Foundation, Jewish Community Foundation of San Diego/Leichtag Family Foundation Partnership, Koret Foundation, Lippman Kanfer Family Foundation, Marcus Foundation, Joseph Meyerhoff and Rebecca Meyerhoff Awards Committee, Jack and Goldie Wolfe Miller Fund, The Morningstar Foundation, The Natan Fund, Rose Community Foundation (Denver), Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties, Charles and Lynn Schusterman Family Foundation, and Birthright Israel NEXT. Additional support was provided by Mandell Berman.

*Connected to Give: Jewish Legacies* and the previous report, *Connected to Give: Key Findings*, are available for download at <http://www.connectedtogive.org>.

**Jumpstart** is a 501(c)(3) philanthropic research & design lab based in Los Angeles. For more information, please visit <http://jumpstartlabs.org> or email [connect@jumpstartlabs.org](mailto:connect@jumpstartlabs.org).