



The Innovation Ecosystem

Emergence of a New Jewish Landscape

BASED ON THE 2008 SURVEY OF NEW JEWISH ORGANIZATIONS

Jumpstart

The Natan Fund

The Samuel Bronfman Foundation

CONTENTS

EXECUTIVE SUMMARY	1
INTRODUCTION	3
ABOUT THE SURVEY	9
KEY FINDINGS	11
RECOMMENDATIONS	25
QUESTIONS FOR FURTHER INQUIRY	31
REFERENCES	32
ACKNOWLEDGMENTS	35
PROJECT COLLABORATORS	36

EXECUTIVE SUMMARY

American Jewish life has evolved dramatically over the past decade as an entire landscape of new Jewish organizations and initiatives have emerged and taken root. Broad social, cultural, and economic changes have laid the groundwork for new approaches to building and sustaining communal life. Changes in Jewish identity and demography, coupled with new technologies and modes of communication, have opened countless new possibilities for imagining Jewish life in the twenty-first century. In and beyond the Jewish community, a new generation of organic, decentralized, and flexible structures is replacing the twentieth century's mechanical, centralized, and top-down organizations.

The 2008 Survey of New Jewish Organizations provided a baseline overview of Jewish startups established over the past decade – their size and reach, funding sources, expenses, structure, and governance. The survey was conducted in November and December 2008, just as the global economic system was spiraling downward. Therefore, we also specifically sought information about the challenges facing these organizations in this particular economic environment. *Jumpstart Research Report 2.09: Key Findings from the 2008 Survey of New Jewish Organizations*, published in February 2009, documented an organic, grassroots, self-organizing ecosystem of Jewish initiatives, which has created a wide variety of access points to Jewish life that emanate from and resonate with multicultural, tech-savvy twenty-first century America. Our research identified more than 300 initiatives reaching more than 400,000 participants, representing approximately \$500 million in investment over the past ten years. These startups engage individuals from multiple generations (including Baby Boomers and beyond) across the spectrum of Jewish identity.

The Innovation Ecosystem: Emergence of a New Jewish Landscape explores the implications of these findings in greater depth. This report offers new policy recommendations for specific ways that stakeholders in the American Jewish community can encourage innovation and build the Jewish future, even as we are forced to contend fully with difficult questions about how to sustain this renaissance in a world of scarcer



financial resources. Our recommendations are for organizations large and small, funders private and public, and innovators in startups and established institutions alike. Keeping the ecosystem growing and thriving is a communal responsibility.

The emerging Jewish innovation ecosystem, in many respects, is the leading edge of the American Jewish community's transition into the twenty-first century. Contemporary challenges require contemporary tools and approaches. Faced with a shifting identity landscape, tectonic economic upheaval, and uncertainty about the future, the American Jewish community's investment in the leaders and inhabitants of the innovation ecosystem may well determine the shape of our future.



INTRODUCTION

American Jewish life has evolved dramatically over the past decade as an entire landscape of new Jewish organizations and initiatives have emerged and taken root. Changes in Jewish identity and demography, coupled with new technologies and modes of communication, have opened countless new possibilities for imagining Jewish life in the twenty-first century. While many Jewish organizations have grappled with the shifting terrain, a new breed of Jewish social entrepreneurs has embraced the chance to remake Jewish life for themselves and their peers. What began as only a handful of innovative ventures, serving a distinct population of Jews seeking options outside the Jewish mainstream, has grown into an entire innovation ecosystem bursting with new vitality and new ideas.¹

Hundreds of dynamic Jewish organizations have opened countless new entry points to Jewish life and built vibrant new Jewish communities. These organizations are connecting hundreds of thousands of people to a Jewish life filled with joy, meaning, and a strong sense of belonging. Jews today can pray and celebrate lifecycle events at independent *minyanim*, perform community service and engage politically through new Jewish social justice groups, and load their iPods with Jewish-themed music spanning every genre. They can hike, bike, and kayak on Jewish eco-adventures and engage with the full spectrum of Jewish civilization through a plethora of websites, blogs, and social networking applications.

in•no•va•tion: \,i-nə-'vā-shən\ *noun*

The creation, development and implementation of a new idea, method or device with the aim of improving efficiency, effectiveness or competitive advantage.

<http://www.digitalstrategy.govt.nz/>

eco•sys•tem: \ ēko-sis-təm\ *noun*

A complex set of relationships of living organisms interacting within their physical environment.

<http://www.educationoasis.com/>

¹ The application of biological and ecological metaphors to economic systems dates to the mid-1990s, and the term “innovation ecosystem” originally appeared in the early 2000s. Please see page 44 for key sources.



AN ORGANIC COMMUNAL INFRASTRUCTURE

This diverse and vibrant collective of new Jewish initiatives forms an organic communal infrastructure that embodies the values and worldviews of their founders and participants. Creative, risk-tolerant supporters from across the spectrum of Jewish philanthropy—foundations, giving circles, independent donors, federations, and some larger organizations—have enabled new approaches to flourish and new leaders to fuel their passions. The diversity of this vibrant ecosystem is evident in its geographical reach, the wide variety of programs and types of organizations, and their ability to attract participants from a range of backgrounds and interests. The elements within the Jewish innovation sector work symbiotically to create a framework that sustains and nourishes its inhabitants.

di•ver•si•ty: \də-ˈvər-sə-tē\ *noun*

The variety and complexity of species present and interacting in an ecosystem and the relative abundance of each.

<http://www.pde.state.pa.us/>

The emerging Jewish innovation ecosystem, in many respects, is the leading edge of the American Jewish community's transition into the twenty-first century. The Jewish communal infrastructure of the last century was built to unify, centralize, and coordinate the fragmented landscape of late nineteenth- and early twentieth-century Jewish organizational life in America. Federations, defense organizations, and the denominational movements all were highly effective responses to this need for unity. These hierarchical and bureaucratic organizations drove the Jewish communal agenda and served as the primary addresses for involvement in American Jewish life throughout the last century.

sym•bi•o•sis: \,sim-bē-ˈō-səs, -bī-\ *adj*

The relation between different species of organisms that are interdependent; each gains benefits from the other.

<http://wordnet.princeton.edu/>

MAKING JEWISH LIFE ACCESSIBLE AND MEANINGFUL

The needs of twenty-first century American Jewry are different. They tend to revolve around making Jewish life accessible and inviting in a more open society: making access to Judaism and Jewish life as barrier-free as possible and linking serious Jewish content to serious life questions. If success in the twentieth century was about showing that Jews are just like everyone else, success today is about demonstrating Judaism's unique value in an open and diverse society.

Moreover, the very idea of Jewish identity has changed. What was once an externally imposed collective concept is now an internally conceived and highly individualistic one. Formal identification with a particular Jewish label is decreasingly important. Because positive choice is now at the core of Jewish identity, the nature of affiliation itself has changed to connote a variety of non-exclusive relationships and connections, all of which overlap, shift, and evolve over time.

niche: \ 'nich \ *noun*

1: a focused targetable, portion (subset) of a market. 2: a place, employment, status, or activity for which a person or thing is best fitted. 3: The particular function or position of an organism or population within an ecological community.

<http://en.wikipedia.org/wiki/niche>

A LANDSCAPE OF NICHE ORGANIZATIONS

Where the unity-focused system of the twentieth century sought to bring together a diversity of individuals in a single organization, the innovation ecosystem fosters a diversity of organizations that serve specific interests, or niches. The health of each organization is not dependent on its size or scale, but rather on the quality of its interactions, the nature of its specialization, and its ability to adapt. Organizations do not need to become large to have impact. In fact, many participants prefer more intimate settings.

a•dapt•a•bil•i•ty: \ -,dap-tə-'bi-lə-tē \ *noun*

1: the ability to change (or be changed) to fit changed circumstances.

<http://wordnet.princeton.edu/>

These broad social, cultural, and economic changes have laid the groundwork for new approaches to building and sustaining communal life. In and beyond the Jewish community, a new generation of organic, decentralized, and flexible structures is replacing the twentieth century's mechanical, centralized, and top-down organizations. Revolutionary new technologies, combined with social and cultural trends toward globalization and multiculturalism, have empowered individuals and groups to create new communities and organizations that speak to their needs and values. New Jewish organizations are built upon independent action, user-generated content, serendipitous collaboration, and impermanence. They can reach people at any place, at any time, with content and programs tailored to individual needs.

or•gan•ic: \ór-'ga-nik\ *adj*

Developing in a manner analogous to the natural growth and evolution characteristic of living organisms; arising as a natural outgrowth.

<http://wordnet.princeton.edu/>

LOWERING BARRIERS TO PARTICIPATION

The organizations in the ecosystem have expanded the opportunities to engage Jewishly beyond those offered by established institutions. Differences in geography, demography, or ideology once limited our ability to form groups of like-minded people. Barriers such as these are giving way to open platforms for shared values and common worldviews, enabling new groups to form easily and cheaply around any shared interest or goal.

Individually, some new organizations have found great public acclaim. However, the structure, impact, and transformative potential of the ecosystem in its entirety has yet to receive the attention it deserves in the broader American Jewish community. The emerging communal infrastructure is more than just a new iteration of an old model; it is a completely new paradigm for how such a system could be organized. For those accustomed to large-scale umbrella Jewish organizations serving many different demographic constituencies under a single

banner, these new initiatives may appear small and fragmented. In content and form, however, they are an accurate reflection of the ways in which people interact and organize in the twenty-first century. Their programs span every aspect of Jewish life and often combine activities in new and unexpected ways. This eclectic approach has spawned communities and organizations that attract both highly engaged and disconnected Jews—at the same time.

AN INTERCONNECTED WEB

As with any ecosystem, the leaders and participants in the Jewish innovation sector are part of an interconnected web. New organizations feed each other ideas, people, and attention. At its best, the interaction of multiple organizations, each pursuing its own interests, supports the entire ecosystem. The network effect, in turn, strengthens each organization within it. This connectivity also encourages reconsideration of how to measure success and return on investment in Jewish organizations, because investment in one may indirectly benefit many others. The overall health of the ecosystem cannot be measured by examining the success or failure of any single organization. Rather, success can be assessed only by looking at the productivity and impact of the ecosystem as a whole. Quantitative benchmarks, such as overall attendance/participation, regular/committed participation, numbers mobilized to action, or numbers inspired to seek other Jewish experiences, must be weighed alongside experiential factors, such as intimacy, depth of involvement, authenticity, and quality.

con•nect•iv•ity: \(\,)kă-, nek-'ti-və-tē, kə-\ *noun*

Allowing for the conservation or maintenance of continuous or connected habitats, so as to preserve movements and exchanges associated with the habitat.

<http://www.pc.gc.ca/>

Unlike many venerable Jewish organizations that have been struggling with creating *demand*—worrying about numbers and trying to retrofit their organizations to attract new and younger audiences—organizations in the innovation ecosystem have had a different problem: one of

building *capacity*. They have been challenged continuously to find the resources to deal with ever-increasing demand for their programs and services. While the past decade has been a time of enormous growth and productivity for these fledgling enterprises, the current financial crisis has radically altered the climate in which they operate.

INVESTING IN THE FUTURE

For some of the smallest organizations, the current economic downturn may have little impact: volunteer-run groups serving small communities can be self-sustaining even in times of scarcity. However, for most of the sector, the freeze comes at a moment of rapid dollar-driven expansion into paid staff and other infrastructure needed to meet rising demand. The current economic crisis places this sector's young organizations in a great deal of peril: they still lack robust, diverse, and long-term funding streams. Although they have achieved programmatic success, they may not have developed enough operational or financial capacity to survive.

Earlier generations of Jewish leaders have recognized that when the American Jewish landscape shifts, so too must Jewish organizational and philanthropic strategies. Contemporary challenges require contemporary tools and approaches. The social entrepreneurs who are developing the innovation ecosystem have the skills, passion, and drive to imagine creative solutions to the challenges facing the Jewish people. Faced with a shifting identity landscape, tectonic economic upheaval, and uncertainty about the future, the American Jewish community's investment in the leaders and inhabitants of the innovation ecosystem may well determine the shape of Jewish life in the twenty-first century and beyond.

ABOUT THE SURVEY

The 2008 Survey of New Jewish Organizations was designed to produce a snapshot of the ecosystem by examining the size, reach, funding sources, expenses, structure, and governance of the Jewish organizations created in the past decade. The survey was conducted in November and December 2008, just as the global economic system was spiraling downward. In addition to general questions about their size and reach, finances, staffing structure, and governance, we specifically sought information about the challenges facing these organizations in this particular economic environment (the complete questionnaire and full results of the survey are available online at <http://www.jewishjumpstart.org/survey/frequencies.html>).

DEFINITION OF A NEW JEWISH ORGANIZATION

For the purposes of this study, we defined new Jewish organizations as U.S.-based nonprofit initiatives founded in 1998 or later with a budget of \$2 million or less. Fiscally sponsored and subsidiary initiatives were included in the sample if they had autonomy in and independent responsibility for budgeting and fundraising. We emailed more than 400 invitations to complete the survey; 290 respondents began the survey. Of those, 230 qualified to be included in the final sample, of which 187, or 81%, completed the entire survey. Through public records, we found that 67 of the non-respondents would have been eligible for inclusion in the results, along with 12 non-respondents whose current operating status is unclear. Between the survey's conclusion and the publication of this report, approximately 10 additional otherwise eligible initiatives were identified. Thus, we estimate that there are slightly more than 300 Jewish startup initiatives currently operating nationwide. A comprehensive list of organizations is available at <http://www.jewishjumpstart.org/survey/organizations.html>. Based on this estimate, we calculate the overall survey response rate at about 75% (60% for completed surveys only).



IDENTIFICATION OF ORGANIZATIONS

Approximately 60% of the sample was identified through lists provided by our colleagues at Bikkurim, the Andrea & Charles Bronfman Philanthropies, the Bronfman Youth Fellowships in Israel Alumni Venture Fund, Center for Leadership Initiatives / ROI 120, Covenant Foundation, Foundation for Jewish Culture, Hadassah Foundation, JESNA, Jewish Community Foundation of Los Angeles, Jewish Venture Philanthropy Fund of Los Angeles, Mechon Hadar, Righteous Persons Foundation, Charles and Lynn Schusterman Family Foundation, Slingshot (21/64), The Steinhardt Foundation for Jewish Life, UJA-Federation of New York's Commission on Jewish Identity and Renewal, and UpStart Bay Area, as well as through lists at The Samuel Bronfman Foundation, Jumpstart, and The Natan Fund. Additional respondents were identified through publicly available nonprofit registries, foundation grantee lists, and other lists of Jewish nonprofits.

KEY FINDINGS

KEY FINDING 1

The size and diversity of the Jewish startup sector indicate that this is not a fringe phenomenon, a novel outreach strategy, or limited to the so-called “next generation.”

KEY FINDING 2

A large number of small, niche-based initiatives has emerged across the country, increasing the number and diversity of customized access points to Jewish life. Few organizations have large numbers of participants and constituents; smaller, more intimate organizations are the norm.

KEY FINDING 3

The vast majority of new initiatives describe their mission category as religion-related, education, arts/culture/humanities, or civil rights/social action/advocacy. Very few are focused on service provision, such as human services, mental health/crisis intervention, employment, housing/shelter, or health care.

KEY FINDING 4

New initiatives bring together people of different Jewish backgrounds and appeal to people at different places in their Jewish journeys. Serving the highly involved and engaging the less connected are not separate activities.

KEY FINDING 5

The sector has grown dramatically, but new initiatives may lack the infrastructure to weather the economic downturn.

KEY FINDING 6

Startups younger than seven years old are especially vulnerable because they do not yet have stable revenue streams.

KEY FINDING 7

Startup leaders face challenges building sustainable models for governance and financial management.

KEY FINDING 8

Jewish startups already are feeling the effects of the economic crisis and say they need sector-wide support to survive.

KEY FINDING 9

Startups seek collaborative approaches to increase the effectiveness of their programming.

KEY FINDING 10

Startups say they would benefit most from mechanisms that lower administrative and operational costs.

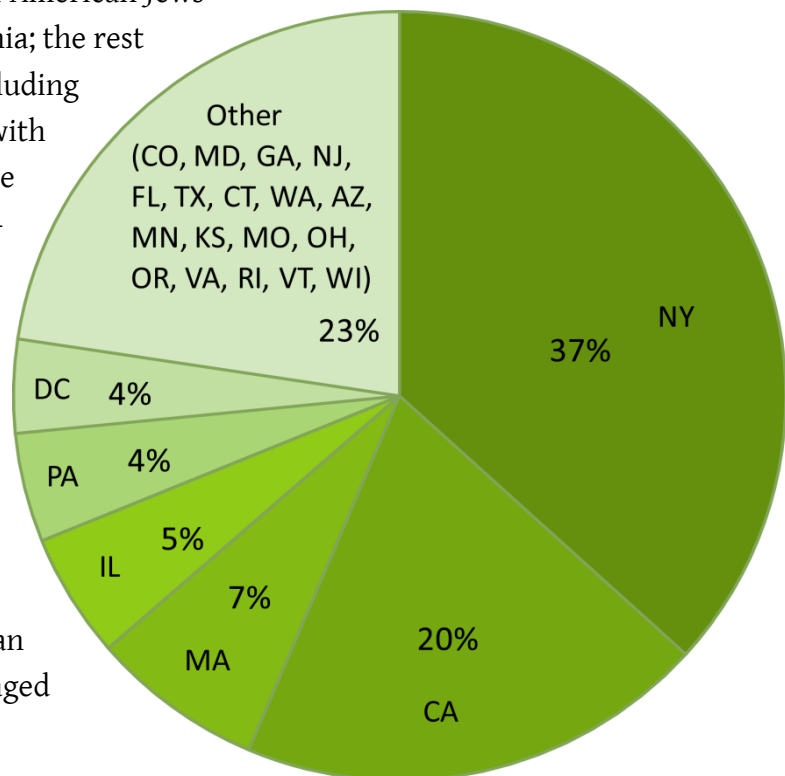
KEY FINDINGS

LANDSCAPE AND PEOPLE

KEY FINDING 1

THE SIZE AND DIVERSITY OF THE JEWISH STARTUP SECTOR INDICATE THAT THIS IS NOT A FRINGE PHENOMENON, A NOVEL OUTREACH STRATEGY, OR LIMITED TO THE SO-CALLED “NEXT GENERATION.”

As of January 2009, we estimate that there are slightly more than 300 Jewish startups currently in operation. About 80% are independent entities and 20% are autonomous subsidiary projects of larger organizations; overall, religious groups (just under three quarters of which are lay-led independent *minyanim*) make up one fifth of the total. 56% of Jewish startups—like 44% of American Jews—are found in New York and California; the rest are in at least 22 other states, including many not normally associated with large Jewish communities. They are in contact with around 360,000-400,000 people, of whom around 125,000-150,000 are regular participants and core members. They claim an average of nearly 7,000 website visitors per month (though half receive 500 or fewer) and about 3,200 people per mailing list (half have 1,200 or fewer).² Although a little more than two-thirds of the population engaged



LOCATION OF JEWISH STARTUPS

² Jewish startups' most important communication tools are their websites, email/newsletter management systems, and social networking technologies such as Facebook and LinkedIn. Although blogs and social networking tools appear to be increasing in importance, with email/newsletter systems on a relative decline, a number of respondents noted in the comments that relationship building and personal outreach, whether face-to-face or by telephone, remain critical.

by Jewish startups are under 45, nearly a third are Baby Boomers and older. Outside high Jewish population states like New York and California, the new initiatives engage an even higher percentage of Baby Boomers as members and participants.

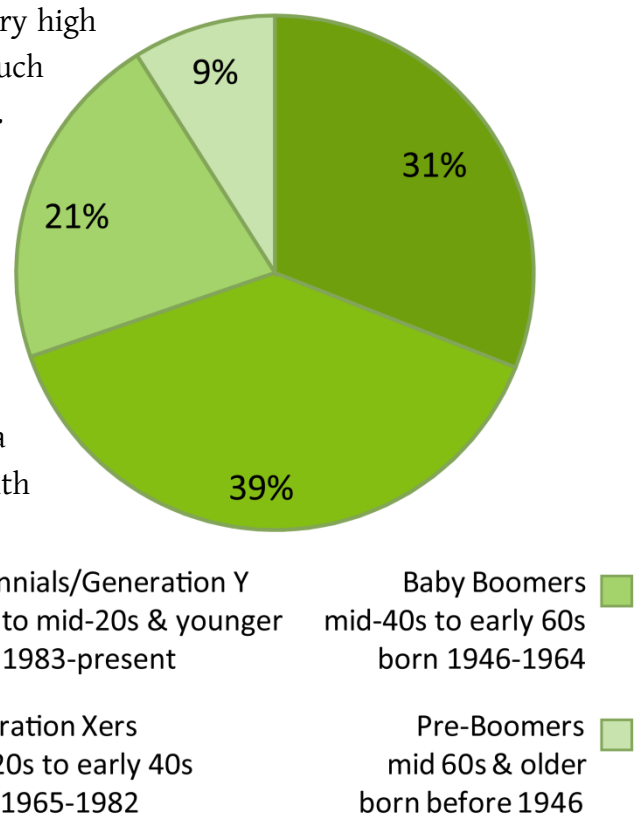
KEY FINDING 2

A LARGE NUMBER OF SMALL, NICHE-BASED INITIATIVES HAS EMERGED ACROSS THE COUNTRY, INCREASING THE NUMBER AND DIVERSITY OF CUSTOMIZED ACCESS POINTS TO JEWISH LIFE. FEW ORGANIZATIONS HAVE LARGE NUMBERS OF PARTICIPANTS AND CONSTITUENTS; SMALLER, MORE INTIMATE ORGANIZATIONS ARE THE NORM.

There are a small number of initiatives with very high attendance and participation levels and a much larger number of groups with lower levels. Although regular participants generally make up about a third of the total annual attendee population, the proportion is higher in smaller initiatives—as is the proportion of people who are highly involved in the Jewish community. Larger initiatives have a higher proportion of episodic attendees and a somewhat higher proportion of participants with no other connections to the organized Jewish community.

As a number of respondents stressed, attendance numbers aren't everything. Where established Jewish institutions tend to use numerical metrics, especially event

head counts, to measure their impact and success, many newer initiatives prefer to focus on the depth of their impact, not just the breadth of their reach, and not simply because they tend to be smaller. The quality of engagement is equally as important as the quantity of individuals engaged.

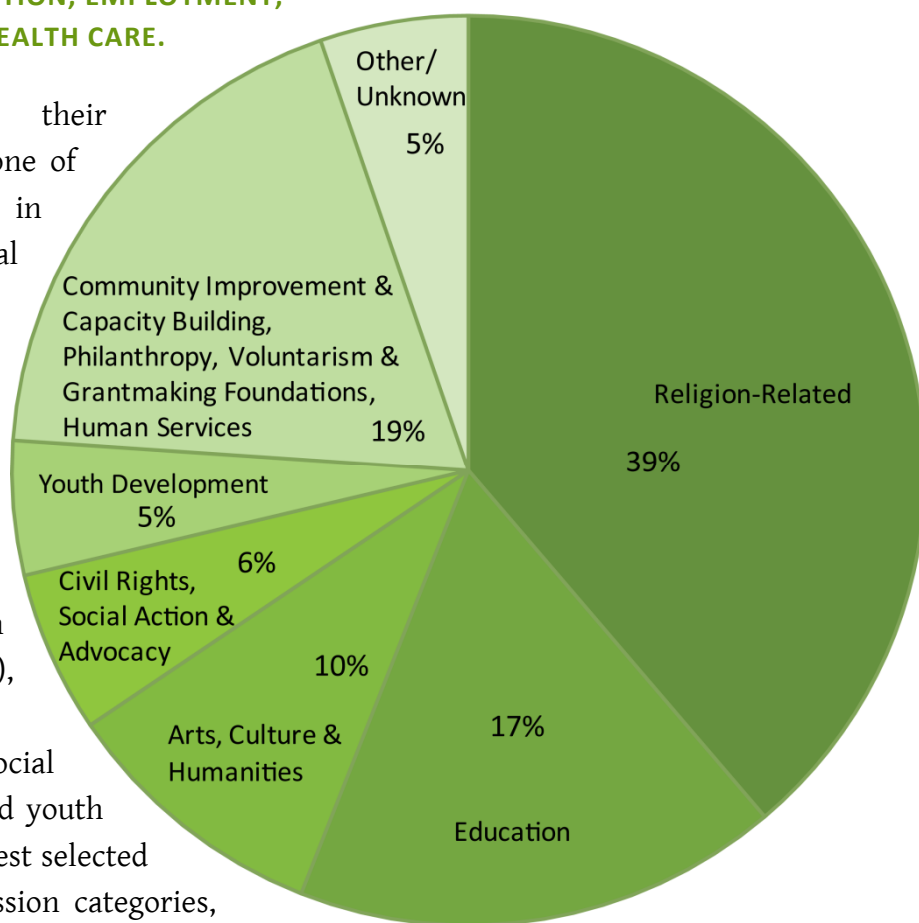


KEY FINDING 3

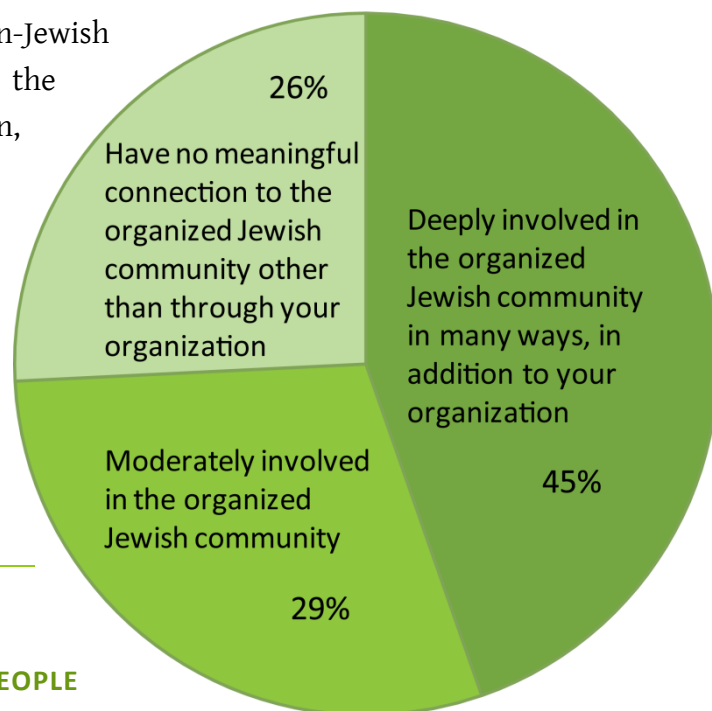
THE VAST MAJORITY OF NEW INITIATIVES DESCRIBE THEIR MISSION CATEGORY AS RELIGION-RELATED, EDUCATION, ARTS/CULTURE/HUMANITIES, OR CIVIL RIGHTS/SOCIAL ACTION/ADVOCACY. VERY FEW ARE FOCUSED ON SERVICE PROVISION, SUCH AS HUMAN SERVICES, MENTAL HEALTH/CRISIS INTERVENTION, EMPLOYMENT, HOUSING/SHELTER, OR HEALTH CARE.

Asked to categorize their initiatives according to one of the umbrella categories in the standard National Taxonomy of Exempt Initiatives (NTEE), 39% of respondents chose “religion-related,” more than twice as many as any other category; almost an equal number (38%) selected from among education (17%), arts/culture/humanities (10%), civil rights/social action/advocacy (6%), and youth development (5%). The rest selected a range of nonprofit mission categories,

including community improvement/capacity building, and philanthropy/voluntarism/grant making. Environment and food/agriculture/nutrition account for fewer than 3% of initiatives. Very few opted for the official nonprofit classifications used by most Jewish community support agencies, such as Jewish Family Services, Jewish Vocational Services, housing-related services, and aging-related services: only 2.9% of Jewish startup initiatives self-identified primarily as human service organizations, another 0.5% each as health care and mental health/crisis intervention groups, and none as employment or housing/shelter initiatives.



The Jewish innovation ecosystem has a strong focus on religion, education, culture, social advocacy, youth work, and creative combinations of these; indeed, given the opportunity to choose more than one mission category, many respondents might have chosen two or more of these key areas. The very small proportion of initiatives focused on human services and related missions invites further analysis. On the one hand, broad-scale social work may not lend itself to low-budget startup structures; alternatively, groups with other primary missions (religion, education, etc.) may pursue human services programming as secondary or tertiary activities (the same potentially is true of environmental priorities). In addition, contemporary Jews—even those with strong Jewish backgrounds and commitments—may be far more likely to engage in human and social services volunteer work through non-Jewish organizations. Nonetheless, during the lean years of the economic downturn, as the demand for critical human and social services swells, and as green initiatives take root across the country, it is possible that innovators may increasingly be motivated to bring their entrepreneurial spirit to initiatives focused on those priorities.



KEY FINDING 4

NEW INITIATIVES BRING TOGETHER PEOPLE OF DIFFERENT JEWISH BACKGROUNDS AND APPEAL TO PEOPLE AT DIFFERENT PLACES IN THEIR JEWISH JOURNEYS. SERVING THE HIGHLY INVOLVED AND ENGAGING THE LESS CONNECTED ARE NOT SEPARATE ACTIVITIES.

Many Jewish startups attract those who are deeply involved as well as those who are moderately involved and the otherwise unaffiliated. Startup leaders estimate that 45% of their constituents and participants already are deeply involved in the Jewish community; 29% are moderately involved; and just over 26% have no other meaningful

connection with the organized Jewish community (irrespective of their Jewish background, which the survey did not address). Individual Jewish startups generally are integrated not only by level of organized Jewish involvement but also by age. To be sure, about one in five reported having only deeply and moderately involved constituents, and 18% said all of them were under 45. However, most initiatives are a mix: half have at least 15% each of deeply involved, moderately involved, and otherwise unaffiliated participants, and slightly more than half reported that people over 45 years old make up at least 25% of their constituents and participants. What they are not is outreach-focused organizations: only 3% report a population that is 90% or more otherwise unaffiliated.

Many startups seem uniquely able to find ways for a wide range of people, Jews and non-Jews alike, to access Jewish life and civilization in a way that works for them. While the vast majority of respondents and their key constituencies see their organizations as clearly motivated by and committed to Judaism, Jewish life, and Jewish values, nonetheless about 15% said they find it more accurate to describe themselves as inspired or informed by them, but not explicitly “Jewish” organizations. One respondent noted, “We work on issues that affect the Jewish community but our work is not exclusively Jewish.” Another observed that the organization had changed over time: “We started as a synagogue event, but now are multi-denominational and multicultural. Those involved represent all faiths and beliefs. ...The organization, and some of its participants, remain[s] informed by Judaism.” A third respondent commented on the tension involved in seeking change within the Jewish community. “We’re often seen first as an LGBTQ enterprise, and second as a Jewish enterprise,” this respondent wrote, “because a number of our contributors are LGBTQ.” These comments speak to the relative fluidity of the new environment, and to the malleability of the Jewish identities evidenced by its denizens.³ Engaging

³ These comments also raise the question of organizational commitments to diversity. Although formal nondiscrimination policies are infrequent—only 43% of respondents reported having one—those organizations with policies appear to be committed to inclusion: 65% mention sexual orientation and 47% mention gender identity/expression. Genetic condition, which will acquire federal protection against employment discrimination as of November 2009, was mentioned by 30% of respondents with policies.

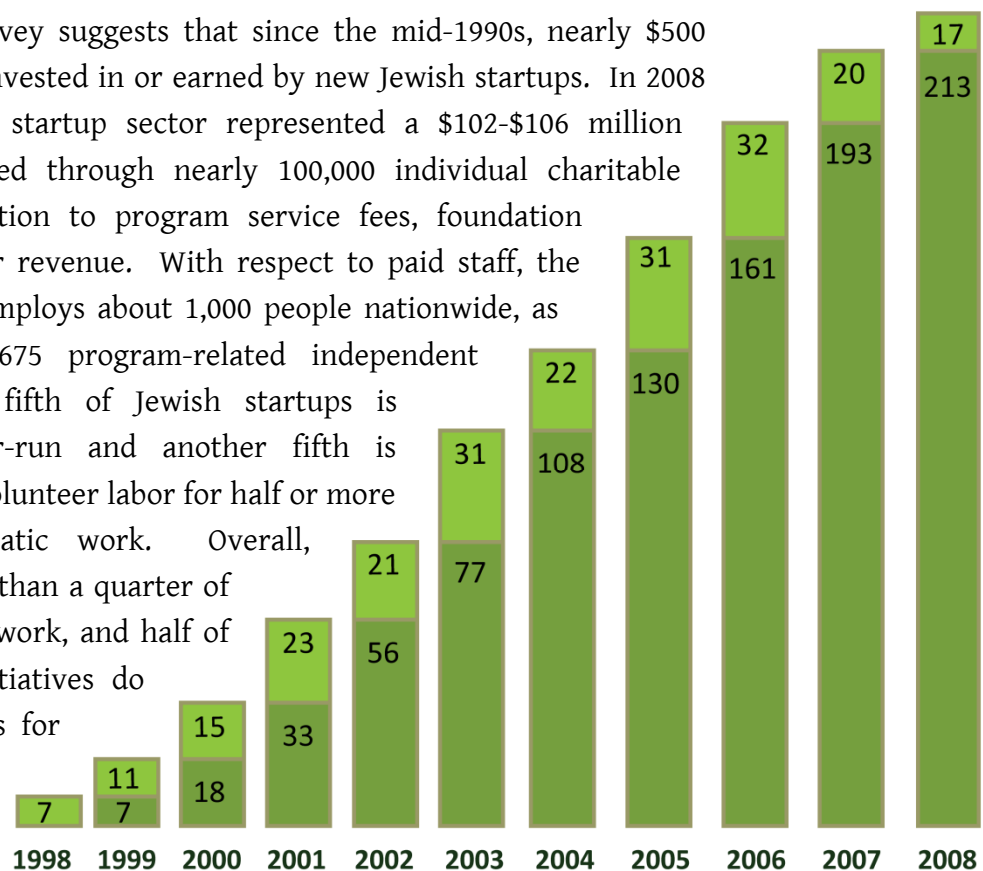
Jewishly is no longer an activity always pursued in dedicated Jewish contexts or exclusively with other Jews. Jewish organizations today operate in a permeable and multi-cultural space and connect with their constituents using the full range of cultural lures available to society at large.

ECONOMIC CONDITIONS

KEY FINDING 5

THE SECTOR HAS GROWN DRAMATICALLY, BUT NEW INITIATIVES MAY LACK THE INFRASTRUCTURE TO WEATHER THE ECONOMIC DOWNTURN.

Data from the survey suggests that since the mid-1990s, nearly \$500 million has been invested in or earned by new Jewish startups. In 2008 alone, the Jewish startup sector represented a \$102-\$106 million economy, supported through nearly 100,000 individual charitable donations in addition to program service fees, foundation support, and other revenue. With respect to paid staff, the sector currently employs about 1,000 people nationwide, as well as around 675 program-related independent contractors. One fifth of Jewish startups is entirely volunteer-run and another fifth is dependent upon volunteer labor for half or more of all programmatic work. Overall, volunteers do less than a quarter of all administrative work, and half of all responding initiatives do not use volunteers for administrative work at all.



GROWTH OF INNOVATION ECOSYSTEM

Among initiatives with independent budgets

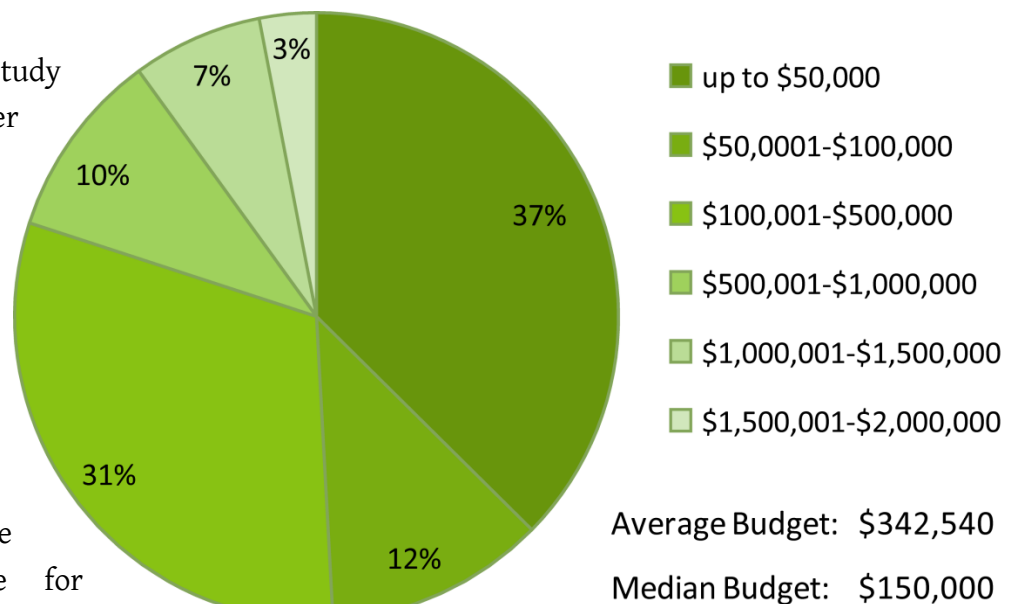
■ New organizations ■ Existing organizations

(not all have them), the average budget is \$342,540, and half have annual budgets of \$150,000 or less. (Among initiatives with paid staff, the average reported budget is \$517,504, and half have annual budgets of \$371,853 or less.) There are a small number of large organizations (10%

have budgets exceeding \$1 million) and a large number of small ones (37% have a budget of \$50,000 or less). In comparison with their nonprofit peers nationwide, of all ages—as surveyed in 2008 by Blackbaud and Guidestar—Jewish startups have disproportionately smaller budgets. 89% reported fewer than 400 donors, and half had 100 or fewer donors. As with the distribution of attendees and regular participants described above, while a small number of organizations have a very large number of individual donors, most organizations have relatively few.

Although this study identified a number of non-financial ways for both organizations and funders to strengthen the innovation ecosystem, survey respondents stressed that there is no substitute for increased financial investment

in startups, especially through multi-year grant making and more unrestricted grants for general operating support. As one wrote, “small groups often don't have infrastructure to even attempt to weather these conditions.” Indeed, in a self-assessment of organizational capacity, respondents rated themselves weakest in fund development and fundraising and board recruitment & development, the two areas most critical to financial sustainability. Ultimately, as one respondent noted, “without general operating support, all these are moot niceties. We are already creative and thrifty out of necessity when it comes to resources, but *ein [Torah] bli [kemach]* (“there is no Torah without bread”). Being able to pay people a living wage and cover basic expenses is very difficult already. Without that, we risk losing the people whose vision and leadership realize our work, and without them cannot continue.”



ANNUAL BUDGETS

KEY FINDING 6

STARTUPS YOUNGER THAN SEVEN YEARS OLD ARE ESPECIALLY VULNERABLE BECAUSE THEY DO NOT YET HAVE STABLE REVENUE STREAMS.

For initiatives less than three years old, individual donations (not including bequests), foundation program grants, and foundation general operations grants are the most important sources of revenue. Initiatives founded more recently also are more likely to look to earned revenue (such as retail sales or website advertising) as one of their top four most important income sources. Among older organizations, fees for program services (such as tuition or other activity fees) are more important: as an organization gains legitimacy, people begin to pay for the products and wisdom it is producing.

For the purposes of this study, we invited survey responses from organizations founded in 1998 or later with budgets of \$2 million or less. Within that population, the data suggest that organizations less than seven years old typically have smaller budgets and income streams that vary widely from year to year. For instance, while foundation grants overall are an important source of revenue, three year-old and six to seven year-old initiatives reported sharply lower dependence on general operating grant income than initiatives just one year older or newer. The newer the groups are, the more likely they are to consider unpaid labor (volunteer labor, in-kind contributions, and pro bono professional services) as one of their top four sources of income. An important rebalancing of income sources toward cash-based revenue typically appears to take place in the sixth or seventh year of an initiative's life, a shift that may mark the end of the startup phase.

]KEY FINDING 7

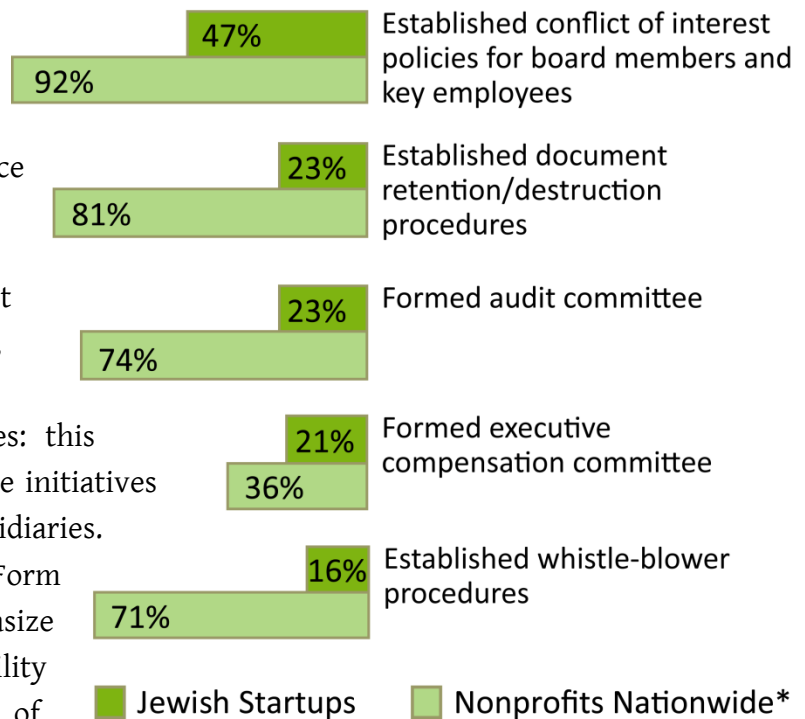
STARTUP LEADERS FACE CHALLENGES BUILDING SUSTAINABLE MODELS FOR GOVERNANCE AND FINANCIAL MANAGEMENT.

Most startup initiatives are independent legal entities that function within the U.S. tax-exempt community, but only about half are required to submit tax returns and other documents available for independent review through sites like Guidestar.org. About 20% of them are religious groups exempt from filing requirements, and 10% of them operate without any corporate structure, tax-exempt status, or fiscal agent. The remainder consists of subsidiary operations; their activities are reported by their sponsoring organizations.

Although corporate transparency and responsibility is front and center in the public consciousness, many survey respondents acknowledged that they might not have the structures in place needed to achieve sustainability in governance and finance.

About one in six respondents do not have ready access to current, detailed information about their organization's budget and finances: this rises to around a third among those initiatives which are managed projects or subsidiaries.

Despite new IRS revisions to the Form 990 tax return designed to emphasize governance and accountability practices, fewer than half of respondents required annually to submit the 990 form report having the key policies in place necessary to address the new requirements in the revised form. Only around one in five respondents reported already



*Grant Thornton 2008 National Board Governance Survey for Not-for-Profit Organizations

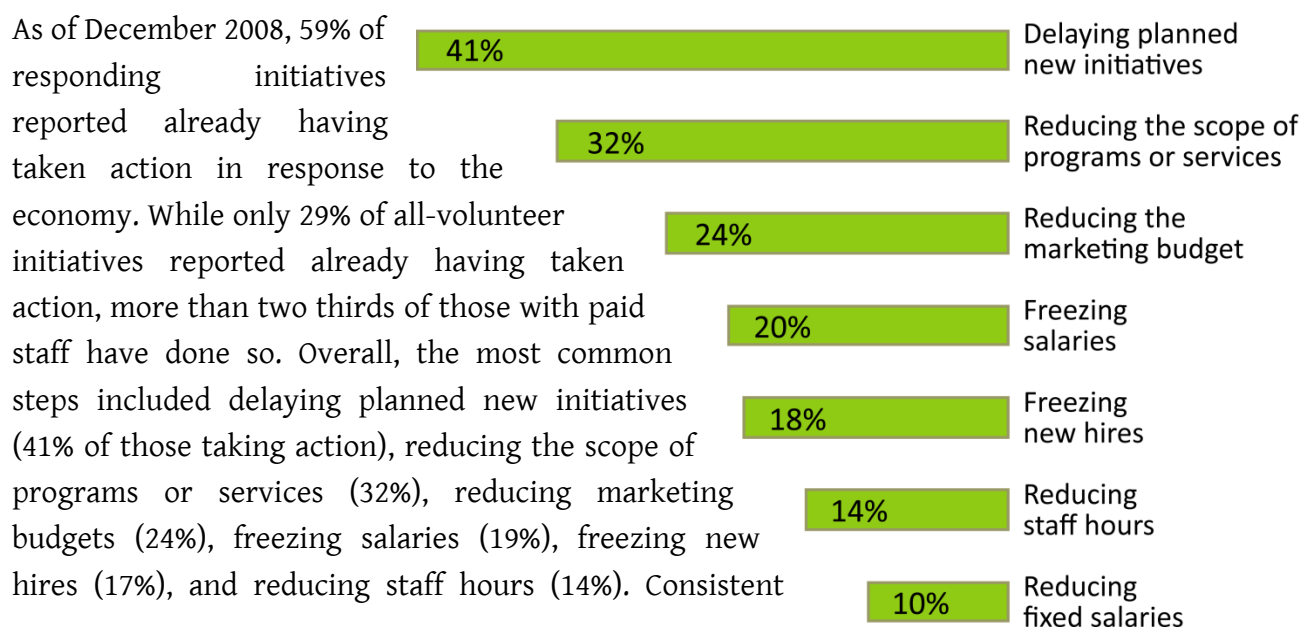
having an audit committee in place, an executive compensation committee, whistleblower procedures, or document retention/destruction procedures.⁴

Many respondents requested that funders supply or provide access to capacity-building services and technical assistance. They may be unaware of the wide range of free and accessible support that exists in the non-sectarian nonprofit world. Only 10-15% of them are affiliated with their local nonprofit support centers and state/regional associations of nonprofits.

SURVIVING THE LEAN YEARS

KEY FINDING 8

JEWISH STARTUPS ALREADY ARE FEELING THE EFFECTS OF THE ECONOMIC CRISIS AND SAY THEY NEED SECTOR-WIDE SUPPORT TO SURVIVE.



⁴ By comparison, 67% of respondents to Blackbaud's 2008 *State of the Nonprofit Industry Survey: North American Survey Results* have formed an audit committee and 46% have established whistleblower procedures. Respondents to the Grant Thornton 2008 *National Board Governance Survey for Not-for-Profit Organizations* also have implemented these governance policies with far greater frequency than 990-obligated Jewish startups. For a selection of sample policies and model board resolutions, please see the Jumpstart website at <http://www.jewishjumpstart.org/resources.html>.

with their self-assessed weaknesses (see Key Findings #6 and #7, above), by far their top priority for external assistance is access to pro bono or discounted professional services (accounting, legal, fundraising consulting, etc.).

Already buffeted by external influences in good times, startup initiatives are at particular risk in the current environment. Many do not have the financial wherewithal or expertise that may be needed to weather the storm. Some question what cutbacks even are viable without irreparably damaging their ability to achieve their missions. Many also say they struggle in the absence of sector-wide structures and philanthropic incentives that reward collaboration and sharing resources. Even with the likely net decrease in available funds, providing long-term funding commitments and helping organizations to increase the number of donors to their organizations (through introductions and referrals) could help mitigate the instability of the startup years and speed the maturation and capacity-building of innovative new initiatives.

Many Jewish startups have managed to function without sufficient budgets to support a staff, a permanent facility or basic equipment. The startups that operate without substantial hard costs essentially continue to operate in startup mode even as they mature. Ironically, though in good times we might lament their undercapitalization, in lean years it may be an asset. The organizations at the lower end of the budget scale are truly labors of love for their organizers and participants, who make up for their own limited financial resources with gifts of time, passion, and creativity.

KEY FINDING 9

STARTUPS SEEK COLLABORATIVE APPROACHES TO INCREASE THE EFFECTIVENESS OF THEIR PROGRAMMING.

The 2008 Survey asked respondents to name one way Jewish startups could be helpful to one another. In the 89 open-ended responses, references to collaboration, partnerships, and sharing or pooling resources appeared more than 77 times. The priorities, as one respondent wrote, are “creative thinking about joint work (partnerships,

mergers), and deep consideration of target audiences and present community needs through broad-based, inter-organizational, inter-generational conversation.” Equally important is avoiding duplicate efforts: “focus upon your mission strengths,” wrote one person, “and reach out where others are stronger.”

Top priorities include developing programs jointly with other organizations (72% said this would have a somewhat or very positive impact on their organization’s health), coordinating event/program calendars (59%). Among respondents from initiatives with paid staff, a somewhat lower percentage expressed interest in sharing program staff (38%). Respondents also sought partnerships among funders and nonprofits working together to achieve and amplify targeted outcomes. Survey respondents noted that streamlined application and reporting procedures, and transparent standards for evaluating proposals and assessing success could lower some development and program costs and free up additional funds for program support.

KEY FINDING 10

STARTUPS SAY THEY WOULD BENEFIT MOST FROM MECHANISMS THAT LOWER ADMINISTRATIVE AND OPERATIONAL COSTS.

Although a number of respondents expressed interest in strategic alliances and partnerships to increase capacity, others noted that their missions and visions are unique to their service area. A top priority for discussion and action is collective purchasing of goods and services, from group health insurance and technology infrastructure to printer ink, shipping, and travel. Among those respondents from initiatives with paid staff, there was much clearer support for sharing technology/IT staff (68%) or administrative staff (54%) than for sharing program staff (see Key Finding #9, above).⁵ There was broad-based support for other operational synergies that would lower administrative costs without

⁵ This reflects the relative expense of non-program staffing costs. Accounting for staffing costs in each functional area, most startups are able to allocate just over half of their budgets to program expenses. About half of the remainder goes to operations, and the rest is divided between human resources administration and development.

sacrificing mission or program independence, such as joining an employee benefits pool (63%), or sharing office space (44%). Around 8% of respondents commented that they already are sharing staff and office space, coordinating event calendars, and programming jointly with other organizations. The relatively high importance placed on achieving cost-savings in administration and operations reflects not only the high relative cost of administration and human resources (around 40% of expenditures) but also the fact that most organizations cannot or do not use volunteers in these areas (see Key Finding #5, above).

By contrast, respondents are much more wary of actual organizational mergers. 42% of respondents anticipated that a merger could have a somewhat or very negative impact on their organization's health, while 31% anticipated a somewhat or very positive impact. Instead of mergers, operational synergies could catalyze rather than stifle innovation through collaborative relationships on the program side (see Key Finding #8, above), including joint ventures, co-sponsored events and projects that serve the missions of multiple organizations and advance the shared values held by these new innovators.

RECOMMENDATIONS

The emergence of the innovation ecosystem and the pressing demands of the time call for a new approach to the nonprofit sector. Stakeholders in the American Jewish community, philanthropists and organizational leaders alike, have common goals, needs, and challenges, and they should collaborate as much as possible to achieve their missions. Most initiatives will remain small and intimate, while a few will develop national infrastructures capable of reaching large numbers. Some organizations will focus on depth of involvement, while others will focus on breadth of reach; some on regular involvement, and others on episodic activity. Funders increasingly want a hands-on role in the organizations they support, and startup entrepreneurs need the wisdom and advocacy funders can provide. All stakeholders contribute to the ecosystem, and the quality of their interaction determines its health.

Jewish innovators report that they are eager to work together with one another and with their investors and supporters to increase their efficiency and impact in order to survive the lean years. Based on our learning from the survey, we offer the following recommendations for specific ways that stakeholders in the American Jewish community can encourage innovation and build the Jewish future. These recommendations are for organizations large and small, funders private and public, and innovators in startups and established institutions alike. Keeping the ecosystem growing and thriving is a communal responsibility. The following recommendations are intended to further that goal.

RECOMMENDATIONS

RECOMMENDATION 1

Incorporate innovation as an essential element of philanthropy and program delivery.

RECOMMENDATION 2

Seek to establish ideas that are relevant to and adaptable in the broader community.

RECOMMENDATION 3

Build a broad and diverse base of financial support for innovation.

RECOMMENDATION 4

Establish a culture of transparent governance and mission accountability.

RECOMMENDATION 5

Change accountability expectations to allow for unpredictability, unintended positive consequences, mid-course corrections, and the possibility of failure.

RECOMMENDATION 6

Change the way success is measured to account for collective impact across the ecosystem.

RECOMMENDATION 7

Recognize and minimize the complex challenges involved in applying for grants, undertaking new programs, and satisfying evaluation and reporting requirements.

RECOMMENDATION 8

Collaborate and cooperate to reduce costs.

RECOMMENDATION 1

INCORPORATE INNOVATION AS AN ESSENTIAL ELEMENT OF PHILANTHROPY AND PROGRAM DELIVERY.

Innovation must become a core activity for continuous self-reinvention across the spectrum of Jewish organizational life, both within well-established institutions and within new ventures. Encouraging the search for creative new solutions to persistent and rising challenges keeps organizational missions relevant for current and future generations. Like a balanced investment portfolio, a healthy philanthropic portfolio, whether individual or communal, balances ongoing commitments to established organizations with investments in new initiatives and startups. Similarly, nonprofits should develop the capacity, within single organizations as well as through collective efforts, to provide frameworks for entrepreneurs to pilot and evaluate new ideas and projects. By supporting proven models with track records of success, while still enabling bold experimentation, the American Jewish community maximizes its return on investment in communal life.

“The world is changing; it's time to approach Judaism in a new way. The old paradigms no longer serve the new world in which we live.”⁶

RECOMMENDATION 2

SEEK TO ESTABLISH IDEAS THAT ARE RELEVANT TO AND ADAPTABLE IN THE BROADER COMMUNITY.

Small organizations serving niche populations can have national impact by showing how their work is relevant beyond their immediate constituencies. Many ideas, programs, and structures pioneered by startups are adaptable for use in other organizations. Seeding the

“We need to show that we are more than our individual initiatives, but the collective voice of the next generation of American Jewry.”

⁶ The quotations in this section are drawn from the open-ended responses to the survey.

ecosystem with such innovations is one of the most powerful ways we have to accelerate the pace of positive change. Funders and nonprofits can exert community-wide influence as drivers of research and development by disseminating their results and participating in best-practice exchanges, such as peer-learning networks.

RECOMMENDATION 3

BUILD A BROAD AND DIVERSE BASE OF FINANCIAL SUPPORT FOR INNOVATION.

Creative initiatives call for equally creative funding strategies. Organizations should continuously pilot new income strategies, from attendance fees and in-kind donations to product sales, fees-for-service, and incentivized giving. Engaged participants can become donors, even at micro-levels. Repeat donors become stakeholders, and motivated stakeholders become vocal supporters. Giving circles, venture philanthropy funds, and rapid micro-grantmaking offer high-impact innovative giving opportunities at low risk to the individual donor. Diversified revenue streams, expanded donor rolls, and unconventional funding vehicles are excellent bulwarks against a volatile market.

RECOMMENDATION 4

ESTABLISH A CULTURE OF TRANSPARENT GOVERNANCE AND MISSION ACCOUNTABILITY.

Sustainability is a direct outgrowth of solid fiscal management practices and regulatory compliance. Organizations seeking to distinguish themselves in a scarce funding environment must demonstrate they are effective and intelligent stewards of donor dollars. Leaders must be proactive in meeting the reporting expectations of both funders and the government. Similarly, the ecosystem as a whole would benefit from more transparency from funders about their strategies and goals. Greater public disclosure and discussion of both successful and failed ventures would be beneficial for funders and nonprofits alike.

“Being honest about what we do and how we do it will help all of us.”

RECOMMENDATION 5

CHANGE ACCOUNTABILITY EXPECTATIONS TO ALLOW FOR UNPREDICTABILITY, UNINTENDED POSITIVE CONSEQUENCES, MID-COURSE CORRECTIONS, AND THE POSSIBILITY OF FAILURE.

Too often funders and organizational leaders alike view their work as a logical and linear process from planned input to intended outcome. This can narrow the range of acceptable outcomes so much that unintended results are not seen as beneficial or even go unnoticed. Sometimes the most important, far-reaching effects of a project cannot be anticipated at its outset. Through close communication during the course of a project, funders and project leaders can learn to recognize whether unanticipated results are positive changes or indicators of larger problems. In an age when today's new idea is tomorrow's indispensable technology, the greatest risk is often not taking risks at all.

RECOMMENDATION 6

CHANGE THE WAY SUCCESS IS MEASURED TO ACCOUNT FOR COLLECTIVE IMPACT ACROSS THE ECOSYSTEM.

In an innovation ecosystem, knowledge creation and capacity building are just as important as program or product delivery, because they make further innovation possible, whether in the originating organization or elsewhere. Therefore, while evaluating individual organizations and programs is important, it is also vital to assess aggregate impact. As initiatives connect, network, build capacity, and engage larger numbers of people, they increase the overall dynamism of the system. Developing sector-wide assessment mechanisms is not easy, but such tools exist and can be brought to bear on the Jewish innovation ecosystem in ways that will ultimately benefit all stakeholders.

"Just because you can measure the outcome (i.e., number of people attending, etc.) doesn't mean it's doing sustainable community-building work."

RECOMMENDATION 7

RECOGNIZE AND MINIMIZE THE COMPLEX CHALLENGES INVOLVED IN APPLYING FOR GRANTS, UNDERTAKING NEW PROGRAMS, AND SATISFYING EVALUATION AND REPORTING REQUIREMENTS.

We must recognize the unique complexities and challenges involved with creating successful programs, finding the funding to support them, designing evaluation metrics, and assessing and reporting impact. Because the new IRS Form 990 expands and regulates much of the extensive financial and governance disclosure now expected in the tax-exempt community, it could become a more useful standard tool for due diligence; its requirements are useful tools even for projects not required to file with the IRS. Still, funding should account for the staff time and overhead required for these tasks, and funders should collaborate to create more streamlined and standardized but adaptable application and reporting procedures.

“I would love to see a common application for Jewish community grants. It would free enormous amounts of time and energy for other fundraising or for programming and outreach.”

RECOMMENDATION 8

COLLABORATE AND COOPERATE TO REDUCE COSTS.

Organizations and funders should seek operational and programmatic synergies to reduce overhead and to leverage expertise. While organizational mergers might be advantageous in some cases, the cost-savings expected from merging often can be realized more simply through joint programming, sharing administrative and technical resources, and pooled purchasing power. By combining their resources to realize economies of scale, organizations can reduce competition for scarce operational funding and increase their focus on program delivery.

“Focus upon your mission strengths and reach out where others are stronger.”

“The more often we come together, the more often we find ways to do what we are doing more efficiently.”

QUESTIONS FOR FURTHER INQUIRY

We see this report as the beginning of an extended conversation about the transformation of the American Jewish community, and the role of new organizations as catalysts, change-agents, and the institutions of the future. The overall survey findings are available at <http://jewishjumpstart.org/survey/ecosystem.html>.

To be sure, the 2008 survey did not address a number of important factors related to these new initiatives, especially demographic and Jewish background data related to their founders and key employees, green business practices, uses of technology, and leadership transition issues. The survey also did not include larger startups with budgets above \$2 million, nor did it capture data about startups that had ceased operating. We hope that future research will address these and the many other questions raised by the 2008 survey.

In addition, asking some of this survey's questions longitudinally would enhance our understanding of how startup initiatives themselves change as they mature, and the factors that enable success or lead to failure.

FEEDBACK

Please let us know what questions or further analysis particularly interest you by emailing njosurvey@jewishjumpstart.org or posting a comment at <http://jewishjumpstart.org/survey/feedback.html>.

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PROJECT COLLABORATORS

JUMPSTART

WWW.JEWISHJUMPSTART.ORG

Jumpstart is an incubator, think tank, catalyst, and advocate for sustainable Jewish innovation. Founded in 2008 by Shawn Landres and Joshua Avedon, its mission is to develop, strengthen, and learn from emerging nonprofit organizations that build community at the nexus of community, spirituality, learning, social activism, and culture. Signature initiatives include a planned fiscal sponsorship platform and J Space, a Jumpstart-catalyzed project to create a multi-tenant nonprofit center for innovative Jewish organizations in Los Angeles.

THE NATAN FUND

WWW.NATAN.ORG

The Natan Fund believes strongly in the power of innovative ideas to transform and strengthen the Jewish people. Supported by a growing group of young philanthropists, Natan makes grants to nonprofit organizations with annual operating budgets of under \$1.5 million in a variety of program areas. Natan's members make all of the foundation's funding decisions, and because the Natan board pays the foundation's operating expenses, 100% of all other donations go directly to the organizations that Natan supports.

THE SAMUEL BRONFMAN FOUNDATION

WWW.THESBF.ORG

Guided by the vision of Edgar M. Bronfman, The Samuel Bronfman Foundation seeks to inspire a renaissance of Jewish life. The foundation's work is informed by the following principles: Jewish renaissance is grounded in Jewish learning; Jewish youth shape the future of the Jewish people; vibrant Jewish communities are open and inclusive; and all Jews are a single family. The foundation cultivates long-term relationships with organizations that advance their mission with innovation, depth and meaning, such as the Bronfman Youth Fellowships in Israel, Hillel: The Foundation for Jewish Campus Life, The Curriculum Initiative, MyJewishLearning.com and the Jewish Outreach Institute among others.



ABOUT THE COVER ART

The language collage in the lightbulb was created with Wordle, a Web application that makes “word clouds” from samples of text. The size of each word in the cloud is proportional to its frequency within the text, so a word cloud reflects, and is in some ways a distillation of the source material.

In order to create the Wordle for *The Innovation Ecosystem*’s front cover, we harvested descriptive language from the websites of a representative sample of organizations invited to complete the survey. Extraneous and generic words were removed and words with similar roots (“collaborate,” “collaborative,” “collaboration,” etc.) were combined in order to create a unified list of words and word frequencies, which were entered into the Java applet Wordle generator at www.wordle.net. Adobe Illustrator was used to re-color and manipulate the resulting output in order to fit it into the lightbulb shape. The Wordle on the back cover was created through a similar process using the full text of this report.

Images created by the Wordle.net web application are licensed under a Creative Commons Attribution 3.0 United States License by Jonathan Feinberg, <http://www.wordle.net>.

Lightbulb Plant,
©iStockphoto.com/DICDESIGN.

ABOUT THIS REPORT

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