Proposal for:

"A STUDY OF AGE-BASED DIFFERENCES IN PHILANTHROPIC GIVING IN THE SYNAGOGUE SETTING"

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INTRODUCTION

The U.S. stock market crash of October 1987 and the IRS's elimination of the charitable deduction for non-itemizers gave rise to widespread predictions that philanthropic giving would dramatically decline in 1987. Surprisingly, just the opposite occurred; charitable giving hit an all-time high.

$93.68 billion is estimated to have been contributed to the nation's gift-supported institutions and organizations in 1987—the last year for which data are available. This represents an increase of almost 6.5% over the previous year's total of $88 billion. This rate of increase is almost twice the growth in the U.S. all-items CPI, and even exceeds the increase in growth of Americans' personal income, which rose just under 6%.(1)

Religious organizations are the perennial favorites of American donors. Charitable giving for religious purposes accounted for $43.61 billion—nearly half of all giving in 1987.(1) Such a high proportion clearly reflects the centrality of religious activities in American society.

These statistics indicate unequivocally that the national impulse to give is stronger than ever. Despite an unfavorable tax environment, stock market uncertainty attributable both to market pressures and the illegal activities of some of its participants, and even the fraud and scandals involved in certain segments of the religious fundraising arena during recent years, Americans are not dissuaded from continuing a long tradition of giving and sharing. As a nation we continue to strengthen philanthropy because it is such an important part of our way of life.
And what is the state of Jewish philanthropy in the United States? How does it compare with the data cited above? (Include here data from the Chicago Jewish Yearbook, Federation & JUF reports, etc.)

It has become a fact of modern Jewish institutional life that the permanence and vitality of our religious organizations depends as much on creed and program as it does on the availability of sufficient and predictable financial resources to articulate the creed and implement the program.

Whereas the parameters of ancient and medieval Jewish life demanded that Jews participate in and support the organized religious structures that were established in accordance with what was believed to be divine prescription, the two-fold emancipation that occurred in the late 18th to 19th Centuries, and other more modern developments, forever altered the financial security of our Jewish institutions.

First, the legal and political emancipation from the ghettos and the elimination of barriers to the entry into the trades and commerce allowed Jews to move into the general community and to establish a social life apart from the Jewish community. Secondly, the religious emancipation offered by the early Reformers permitted Jews to break with many of the ritual behaviors which had become normative throughout the ages. In addition to embracing the vernacular in place of Hebrew for use at religious services and discarding the dietary laws and ritual garb, other behaviors which liberal Jews no longer felt compelled to perform may have also included observance of Sabbath, participation in synagogue activities, and providing financial support for Jewish institutions.
Yet another aspect to modern Jewish life which negatively impacts on the financial stability of the synagogue—particularly in 20th century America—is the accelerating fragmentation of the once monolithic organic Jewish community with the synagogue at its center. The establishment of Jewish social service agencies independent of the synagogue and, as a consequence, the rise of the Federation movement have created keen competition for the synagogue's once-reliable philanthropic income.

Finally, the addition of the State of Israel to this equation with its legitimate requirements for financial support in both war-time and peace-time have seemingly created a permanent and insatiable demand for an ever greater portion of American Jewry's charitable dollar.

PURPOSE

Even though the overall level of general and religious philanthropy has never been higher—both in the secular and in the Jewish communities—our synagogue boards of directors meetings are often dominated by intense discussions about raising funds for support of this important Jewish communal institution. Understanding the global historical influences just cited does little to improve our understanding of the more particularistic relationships our members have with our synagogues at the local level.

Much research waits to be done that will yield valuable information about both the demographic and psychographic characteristics of Jewish donors. Understanding these factors will hopefully lead to better planning, fundraising, and program implementation—all of which will enable the advancement of the individual missions of our synagogues.
It has always been presumed that synagogue members who have reached chronological and professional maturity are the most predisposed to give because they are the most able to give. Some assumptions typically used to support this position are: incomes are higher; homes have been furnished; college tuitions have been paid; satisfactory estate planning has been accomplished thereby creating more confidence in the future, and so forth.

Furthermore, it is possible that older donors are motivated toward greater giving to Jewish organizations by having been witness to such historical events as World War II, the Holocaust, and the struggle for the establishment of the State of Israel. Also, because they grew up in an era when anti-Semitic behaviors did not receive the nearly universal condemnation that can be expected today, these older Jewish Americans may have experienced first-hand discrimination in housing, education and employment opportunities, thereby compelling them to greater Jewish charity. Thanks to the efforts of organizations such as the Anti-Defamation League of the B'nai B'rith, the American Jewish Congress and others, younger members of the Jewish population grew up free of the pernicious effects of anti-Semitism and may take Jewish survival for granted.

These challenges to Jewish survival may remain as a permanent historical and emotional reference in the older donor's consciousness which needs only indirect stimulation to produce the desired outcome: a charitable gift to the synagogue or other Jewish institution.

There is, however, very little literature available on the subject of charitable giving to either corroborate or refute these theories.
On the contrary, the recent identification of the high-income "young urban professional" permits a serious challenge to this heretofore venerated axiom. Why is it widely believed that the young urban professional is not a good prospect to make a significant gift to the synagogue?

If the young urban professional can claim income parity with members of the older age cohort, can the synagogue make a claim for a greater share of his/her income for charitable purposes? What attitudinal differences about charitable giving can be discerned between these two groups? Are there separate historical and experiential factors at work which influence these two groups to behave differently?

The purpose of this study is to determine the existence of variations in giving patterns among synagogue members of different age groups and to explore the nature of the attitudinal underpinnings of these differences. It is hoped the answers to these and other questions will provide a better understanding of the motivations of various segments of our synagogue membership that will enable synagogue leaders to develop more effective fundraising strategies.

**HYPOTHESES**

I. Synagogue members with equal incomes but in different age cohorts exhibit different giving patterns.

II. These differences in giving patterns are explained at least in part by the presence or absence of historical factors related to Jewish survival and/or experiential factors related to first-hand contact with anti-Semitic behaviors.
METHODOLOGY

Because very little information is available on this subject, it is proposed here to undertake a survey of the members of a single large urban congregation in order to gather data which can be analyzed to answer the major questions raised earlier.

The survey will be sent on the researcher's personal letterhead, thereby avoiding to the extent possible the appearance that survey results will be used by the synagogue for direct solicitation of funds. Also, the survey will guarantee anonymity by not asking for any identifying information and by using a "self-mailer" or including a self-addressed return envelope.

The survey will be divided into several parts. Demographic information such as age, marital status, income, place of residence (urban vs. suburban) will be requested in the first part. Secondly, a brief inquiry will be made into the strength of the attachment to the synagogue held by the respondent as measured by the extent of previous gifts, level of volunteerism, attendance at services and/or other programs, and so on. Finally, a Likert-type scale will be used to explore the respondent's attitude about selected psychographic descriptors, attitudes about the synagogue, importance of certain historical events, and other factors which can be used in making the necessary correlations.

When the survey instrument has been drafted, it will be tested for comprehensiveness, coherence, validity, and completion time on a pilot sample consisting of acquaintances of the researcher's who are members of other synagogues. The instrument will be refined as necessary.
If the survey is more than two pages in length or takes more than 10 minutes to complete, it will be divided into two different surveys, each having identical demographic and historical questions, but non-duplicative Likert-scaled questions in the third part. In this case, the inference will have to be drawn that respondents with similar demographic and historical profiles who received different versions would have answered the psychographic and attitudinal questions similarly, and a composite can be made.

Only one survey will be mailed to each household. The respondent will be asked to identify whether the survey is being completed by the head of household (principal wage earner) or spouse. Questions related to income will ask for combined family income.

The typography for the categories of charitable causes or recipients was developed by others.(2) No typography is likely to be completely satisfactory; there will always be activities which do not fit comfortably into any previously conceived category, and there are always those causes which seem to fit equally well into more than one category. It is hoped that the cases of ambiguous responses will tend to cancel each other.

If, as expected, the survey yields no more than 10-15% response rate, no statistical significance can be claimed or generalizations attempted. However, with a sample size of over seventeen hundred, 170-255 responses may permit some tentative conclusions to be drawn about the particular synagogue membership studied. Because of the individualistic nature of the relationship each congregation has with its membership, extreme caution should be used in extending these results to other synagogues.
Although the specific topic for study in the present instance is the relationship of age to the ability and inclination to make monetary charitable contributions, the survey may capture information that may be of interest for other purposes. The raw data resulting from this survey will be made available to other researchers proposing a legitimate pursuit into related areas where this data could be useful.
BIBLIOGRAPHY


