JIM JOSEPH
FOUNDATION
Shimon ben Joseph

Annual Report 2008

Engaging and Inspiring Young Jewish Minds

To foster compelling, effective Jewish learning experiences for young Jews.

Mission

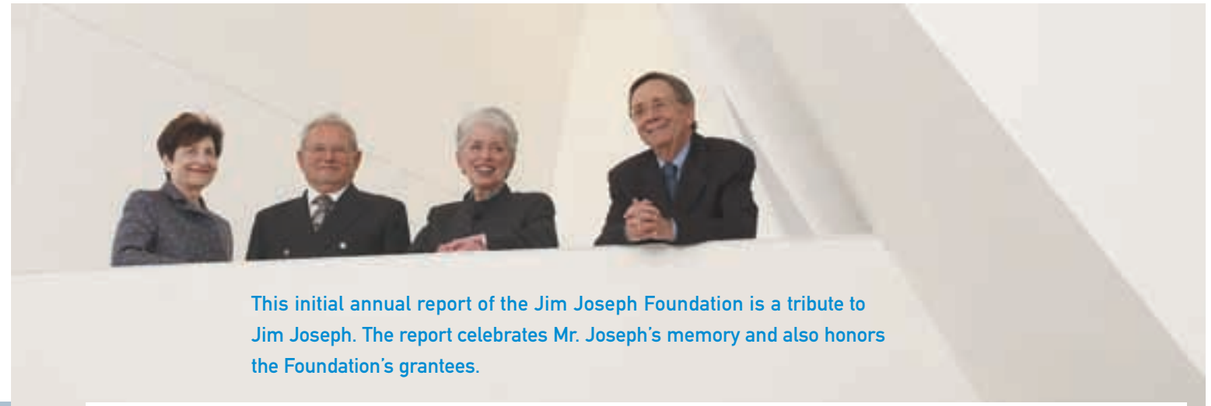
Jim Joseph,

whose Hebrew name was Shimon ben Yosef Yitzhak, was a dedicated Jewish philanthropist who cared passionately about the education of Jewish children and youth.

Born in Austria in 1935, Jim came to America with his family in 1939. Throughout his life, he was deeply influenced by the strong sense of Jewish heritage and pride instilled in him by his parents. He believed that focusing on young people was the best way to preserve that heritage for the future. The highly successful career that Jim built enabled him to form the Jim Joseph Foundation to support intensive Jewish education in America.

Jim passed away in December, 2003. His fervor and distinctive voice are greatly missed, yet his legacy lives on. The Foundation's Board of Directors and staff continually build on the philanthropic mission that Jim pursued: to foster compelling, effective learning experiences for young Jews in the United States.

In keeping with Jim's view, the Foundation recognizes that Jewish learning takes place in a multitude of settings over time, through critical stages of development. Jim understood the importance of increasing the number of exceptionally well-trained, Jewishly literate educators. He was passionate about Torah and the practice of its core teachings. He realized that Judaism itself is dynamic. He also upheld a strong commitment to the state of Israel. These beliefs are reflected in the Foundation's values and are the pillars of its work in helping to promote excellence in Jewish education.



This initial annual report of the Jim Joseph Foundation is a tribute to Jim Joseph. The report celebrates Mr. Joseph's memory and also honors the Foundation's grantees.

Jim Joseph Foundation Board of Directors
from left to right:
Phyllis Cook
Jack Slomovic
Susan Folkman, Ph.D.
Alvin T. Levitt, President

Not Pictured:
Dvora Joseph
Jerome Somers

The grantee organizations profiled and cited in this report are in effect partners in the Foundation's real work. The Foundation's vision of "*ever increasing numbers of young Jews engaged in ongoing Jewish learning and choosing to lead vibrant Jewish lives*" could not be achievable without the initiative, innovation, and program implementation excellence of these organizations. We expect the Foundation itself and our grantees to perform in a way that is as cooperative, trusting, and mutually supportive as possible.

In preparing to publish this report, we have conducted a careful review of all the Foundation's grant making since its inception. We note the following trends in the Foundation philanthropy:

- Approximately 70 percent of the Foundation's grants support Jewish learning of young adults, ages 13-30.
- The Foundation's grant making typically supports initiatives in one of four areas:
  - –Educator training, certification, and professional development
  - –Peer-to-peer education
  - –Immersive and/or ongoing Jewish experience
  - –Strengthening organizations to build the field
- The Foundation routinely seeks to partner with other funders, but also to act as a major or sole funder of initiatives it deems worthy.
- The Foundation has invested in a wide range of assessments of its grants in an effort to account for both quantitative and qualitative aspects of its grants and the achievement of its grantees.
- Finally, unpredictable forces that impact the social world, such as the recent severe economic recession, create emergencies that have resulted in unanticipated uses of the Foundation's resources.

This published report—also available online—is a manifestation of the Foundation's commitment to transparency and accountability. It is also a means to encourage other funders to consider supporting the programs described in this report that they find worthy of consideration.

We have learned a great deal in our first several years of operation. While this document presents our 2008 annual report, it also attempts to profile a more complex picture of the Foundation's grant making. To that end, some detail in this report portrays the Foundation's philanthropy since its 2006 inception through the July 2009 meeting of the Board of Directors.

We hope this inaugural annual report tells a meaningful story of the myriad ways the Foundation's grantee organizations are helping to make Jim Joseph's vision a reality.

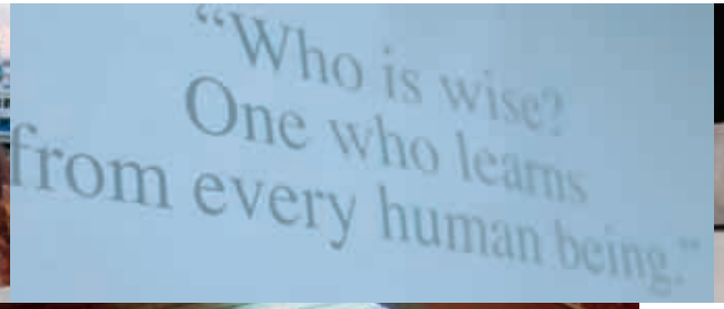
Alvin T. Levitt
President

Charles "Chip" Edelsberg, Ph.D.
Executive Director

BBYO Passport to Israel. Teens hike a canyon in the Negev Desert. Photo by Ian Kandel

Enriching the Educators

Compelling Jewish learning experiences depend on the dedication and expertise of highly qualified educators. The Foundation supports efforts that build the population of Jewishly literate educators who are deeply committed to continuous learning and the profession.



1 **Jim Joseph Foundation.** Board President Al Levitt with Birthright Israel NEXT City Directors Lindsay Litowitz, Naomi Shapiro, Eli Raber, Adam Oded, and Sarah Kornhauser.
Photo by Josh Miller

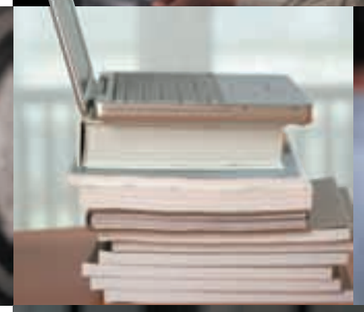
2 **iCenter.** Israel at the Center Kallah, August 2009 at OSRUI in Wisconsin (Olin Sang Ruby Union Institute). Emory professor and Center for Israel Education President, Ken Stein, lectures.
Photo by See3 Communications

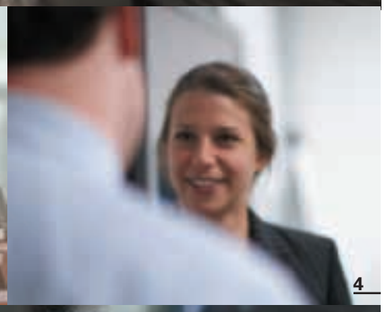
3 July 2009 Convening of BBYO, Birthright Israel NEXT, Foundation for Jewish Camp, Hillel, and REPAIR.
Pictured: Rabbi David Kasher, **Hillel**

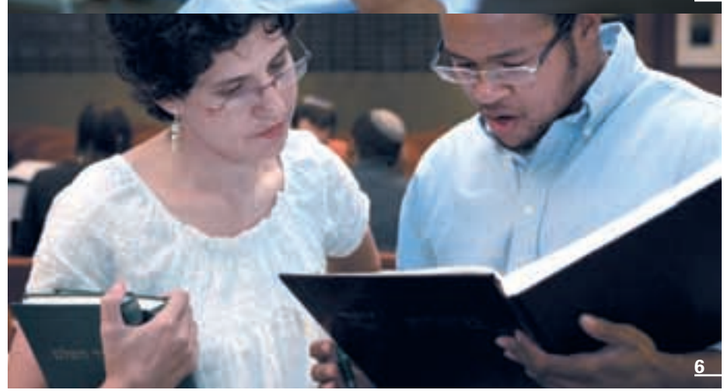
4 July 2009 Convening of BBYO, Birthright Israel NEXT, Foundation for Jewish Camp, Hillel, and REPAIR.
Pictured: Malki Karkowsky, **BBYO**

5 July 2009 Convening of BBYO, Birthright Israel NEXT, Foundation for Jewish Camp, Hillel, and REPAIR.
Pictured: Rabbi David Kessel, **BBYO**
Photos 3-5 by Doug Adesko

6 **Yeshivat Hadar.** Teacher helps student learn Talmud, New York City.
Photo by Jori Klein







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Advancing Peer Learning

Peers are an unquestionably strong influence on young people. Social networks and new media offer unprecedented means to bring young Jews together through shared interests. The Foundation supports groundbreaking programs that leverage such interactions to motivate young Jews to engage in meaningful Jewish learning experiences.

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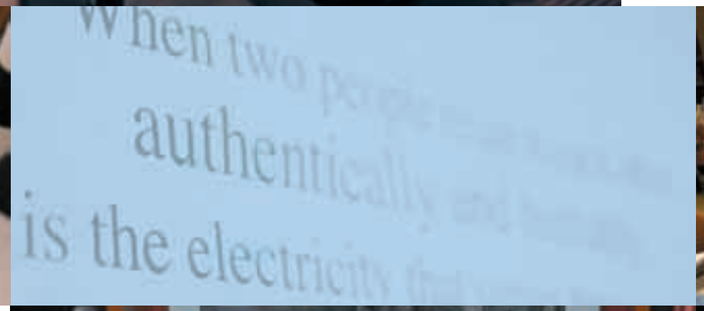

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1 Havdalah during the **Birthright Israel NEXT** fellows training weekend, New Orleans. From left to right, Rachel Thompson, Adam Oded, Ariel Rabin, and Lia Fischer. *Photo by Birthright Israel NEXT*

2 **Yeshivat Hadar.** Teacher and students learning Bible, New York City. *Photo by Jorge Portillo*

3 **Yeshivat Hadar.** Students learning in the beit midrash, New York City. *Photo by Jori Klein*

4 **BBYO.** Teens work directly with youth during BBYO's community service and advocacy summer experience. *Photo by Ilille Sawady*

5 July 2009 Convening of BBYO, Birthright Israel NEXT, Foundation for Jewish Camp, Hillel, and REPAIR. Pictured: Wayne Firestone, **Hillel**. *Photo by Doug Adesko*

6 **Birthright Israel NEXT.** Israelity Tour participants. *Photo by Jonathan J. Stone*

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The ongoing, immersive nature of Jewish learning that young people experience in settings such as day and high schools and residential camps plays a vital role in nurturing young Jews. The Foundation enables greater numbers of Jewish youth to participate in high-quality, educational programs that engage heart, mind, and body.

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1 **Foundation for Jewish Camp**. Bunkmates at one of 150 nonprofit Jewish overnight camps in North America. *Photo provided by Foundation for Jewish Camp.*

2 **BBYO**. Exploring the Jewish homeland with BBYO's Passport to Israel. *Photo by Ofer Ribak*

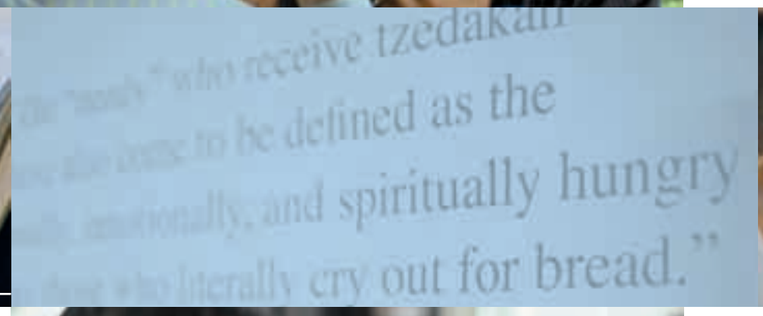
3 **Foundation for Jewish Camp**. Campers prepare for another active day. *Photo provided by Foundation for Jewish Camp.*

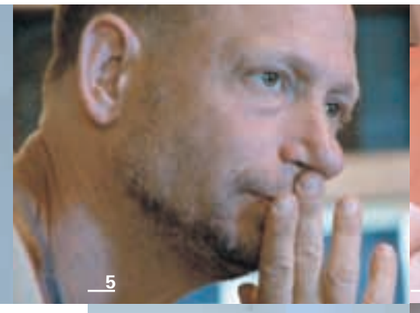
4 **Foundation for Jewish Camp**. Children share a memorable campfire experience. *Photo provided by Foundation for Jewish Camp.*

5 **BBYO**. Teens doing urban "greening" in Baltimore as part of BBYO community service summer program. *Photo by Ilille Sawady*

Excellence in Jewish education requires more than a personal commitment from individuals. By strengthening the organizations that serve the field, the Foundation provides critical resources to enhance the enterprise of Jewish education.

Building the Field





1-2 **iCenter**. Israel at the Center Kallah, August 2009 at OSRUI in Wisconsin (Olin Sang Ruby Union Institute). Pictured No. 1, left, Professor Ken Stein, Emory University, Center facing, Rabbi Leor Sinai, Jewish Lens, and Rabbi Fred Margulies, Lay Leader. *Photo by See3 Communications*

3 July 2009 Convening of BBYO, Birthright Israel NEXT, Foundation for Jewish Camp, Hillel, and REPAIR. Pictured left to right, Brett Krichiver, **Hillel** and Sarah Kornhauser, **Birthright Israel NEXT**. *Photo by Doug Adesko*

4 July 2009 Convening of BBYO, Birthright Israel NEXT, Foundation for Jewish Camp, Hillel, and REPAIR. Picutured: Ian Kandel, **BBYO**. *Photo by Doug Adesko*

5 **iCenter**. Israel at the Center Kallah, August 2009 at OSRUI in Wisconsin (Olin Sang Ruby Union Institute). Pictured: Ilan Vitemberg, Associate Director of the Israel Education Initiative of San Francisco. *Photo by See3 Communications*

6 **iCenter**. Israel at the Center Kallah, August 2009 at OSRUI in Wisconsin (Olin Sang Ruby Union Institute). Pictured: Two teachers on either side of Amnon Levav, President, of SIT, Systematic Inventive Thinking. *Photo by See3 Communications*

7 **iCenter**. Israel at the Center Kallah, August 2009 at OSRUI in Wisconsin (Olin Sang Ruby Union Institute). Pictured: Marilyn Vincent, Early Childhood Specialist. *Photo by See3 Communications*

8 July 2009 Convening of BBYO, Birthright Israel NEXT, Foundation for Jewish Camp, Hillel, and REPAIR. Pictured left to right: Rabbi Daniel Brenner, **Birthright Israel NEXT**; Wayne Firestone, **Hillel**; Matt Grossman, **BBYO**. *Photo by Doug Adesko*

9 **iCenter**. Israel at the Center Kallah, August 2009 at OSRUI in Wisconsin (Olin Sang Ruby Union Institute). Pictured: Dr. David Bryfman, iTeam member and director of the New Center for Collaboration and Leadership, BJE, New York. *Photo by See3 Communications*

For more information on the Foundation's decision making guidelines, please refer to the "Our Process" section on our website at http://www.jimjosephfoundation.org/process.

BBYO Passport to Israel. Teenage participants overlooking Masada. Photo by Ofer Ribak

Financial Statements

The Foundation prepares financial statements on an accrual basis. Summary information for 2007 and 2008 is presented below:

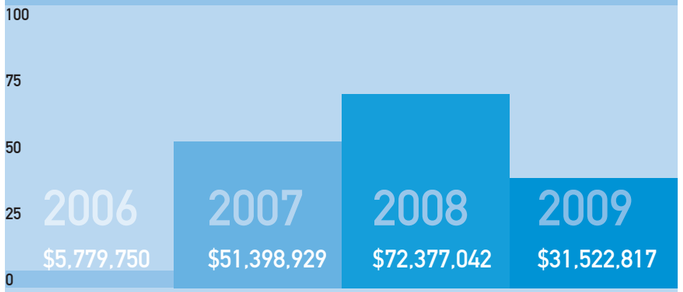
Consolidated Statements of Financial Position as of December 31, 2008 and 2007 *(in thousands)*

Assets:	2008	2007
Cash and cash equivalents	$ 84,515	$ 86,346
Investments	939,924	1,128,740
Other assets	13,724	13,301
Total assets	**$ 1,038,163**	**$ 1,228,387**
Liabilities:		
Mortgage loans and assessments	$ 213,515	$ 173,686
Grants payable	77,265	38,117
Deferred tax liabilities	3,605	7,668
Other liabilities	5,656	8,864
Total liabilities	300,041	228,335
Minority Interests	10,560	24,519
Net Assets	727,562	975,533
Total liabilities and net assets	**$ 1,038,163**	**$ 1,228,387**

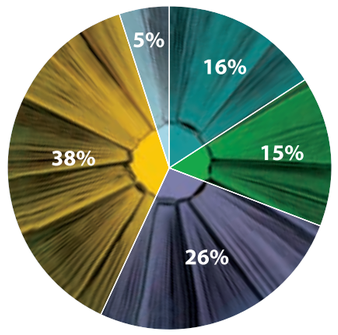
Consolidated Statements of Activities and Changes in Net Assets for the Years Ended December 31, 2008 and 2007 *(in thousands)*

Income (Losses):	2008	2007
Real estate investments	$ (83,180)	$ 16,713
Other investments	(103,941)	39,079
Total revenues	**(187,121)**	**55,792**
Contributions	250	15,639
Expenditures:		
Grants awarded	62,696	45,413
Administrative expenses	2,196	1,946
Federal excise tax expense (income)	(3,792)	8,433
Total expenditures	**61,100**	**55,792**
Increase (decrease) in net assets	(247,971)	15,639
Net assets beginning of year	975,533	959,894
Net assets end of year	$ 727,562	$ 975,533

Awards Summary as of July 31, 2009

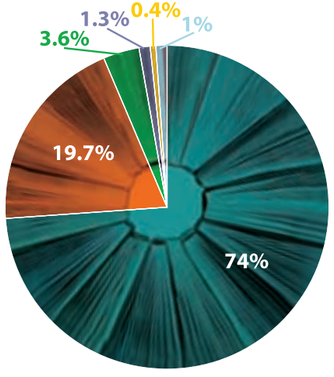


Total Grants Made: $161,078,538



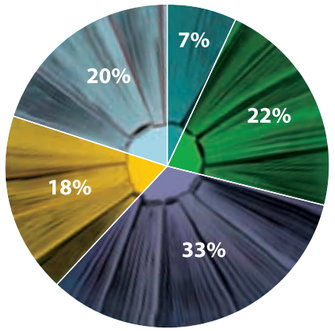
Grant Objectives

Ongoing and Immersive Jewish Learning	$ 61M	38%
Training Professional Educators	$ 40.8M	26%
Stronger Organizations to Serve the Field	$ 26.2M	16%
Peer-to-Peer Education	$ 24.7M	15%
Related Educational Initiatives	$ 8.3M	5%



Type of Grant Support

Program	$119.3M	74%
General Operating Support	$ 31.7M	19.7%
Evaluation	$ 5.7M	3.6%
Recommended Director Discretionary	$ 2.1M	1.3%
Research	$ 1.6M	1%
Planning	$ .6M	.4%



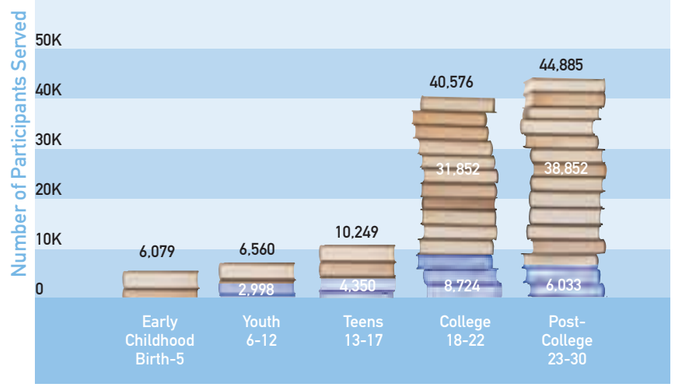
Grants Made by Age Cohort

Teens	13-17	$ 53.6M	33%
Youth	6-12	$ 34.7M	22%
Post-College	23-30	$ 32M	20%
College	18-22	$ 28.9M	18%
Early Childhood	Birth-5	$ 11.8M	7%

Grants serving multiple age cohorts are distributed proportionally across the age ranges. Grants for training educators and professionals are categorized based on the age cohort they will ultimately be serving.

Projected Total Number of Young Jews Served: 108,349*

Beneficiaries: Young Jews

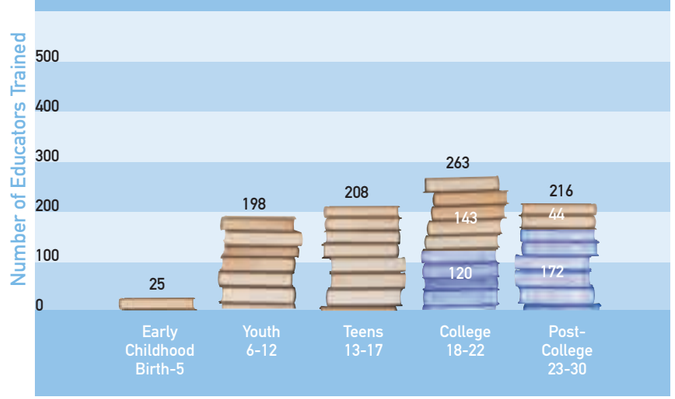


Ongoing or immersive experiences
All other experiences

* Based on estimates in grants approved.

Projected Total Number of Educators Trained: 910*

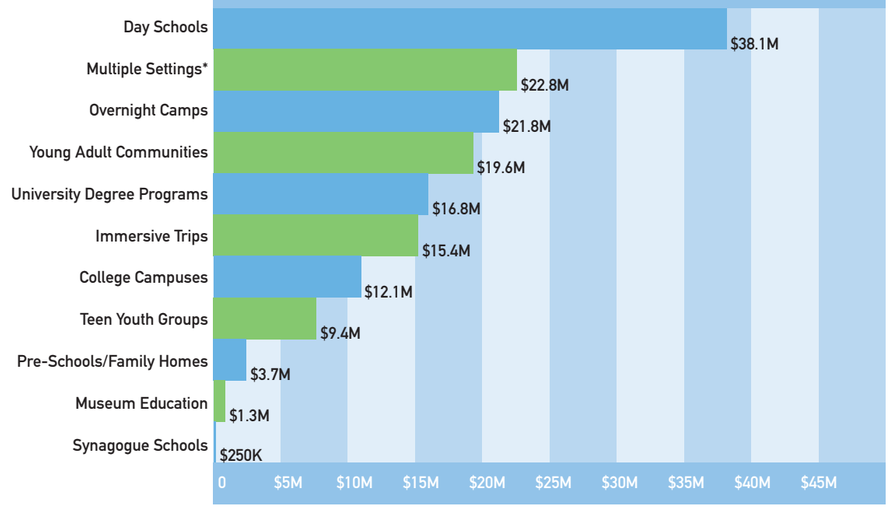
Beneficiaries: Educators



Professional educators
Peer educators

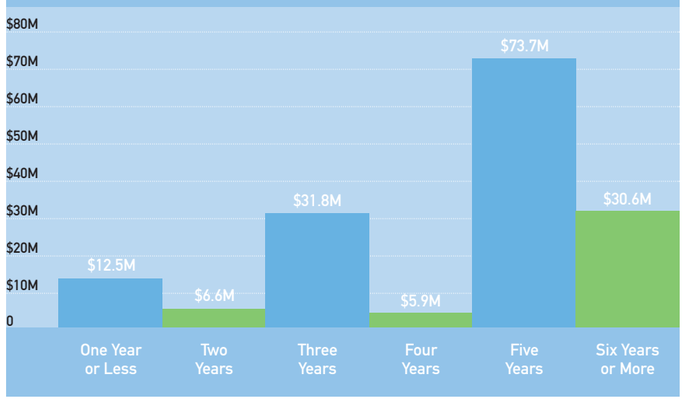
* Based on estimates in grants approved.

Grants by Education Setting



* Multiple Settings category includes grants that will have broad impact across a range of educational settings.

Duration of Grants Awarded



88% of funds awarded are multi-year grants for three years or more.

Supporting the Vision

The following is a list of major foundation grants and grantee beneficiaries awarded from January, 2006 through July, 2009.

2006

Birthright Israel Foundation
2006 Birthright trip participation

Jewish Funders Network
Match: the Jewish Day School Matching Grants Initiative

Partnership for Excellence in Jewish Education Inc.
General Support 2007-2012

The Curriculum Initiative, Inc.
General Operating Support

Yeshiva University
Global Learning Initiative

2007

American Friends of the Shalom Hartman Institute
Melamdim: Training teachers for U.S. Jewish community day high schools

American Pardes Foundation, Inc.
Pardes Educators Program Alumni Network

B'nai B'rith Youth Organization Inc.
Professional Development Initiative Cohort 1

Bar Ilan University in Israel
Construction of Jim Joseph Education Building

Birthright Israel Foundation
2007-2008 Trip participation for 25 and 26-year olds; post-trip follow-up; marketing; and operations

Brandeis University
DeLeT MAT program

Brandeis University
Jewish education research website

Brandeis University
Summer Institute for Israel Studies

Bureau of Jewish Education of Greater Los Angeles
Los Angeles March of the Living

Contemporary Jewish Museum and Reboot, Inc.
DAWN: A Shavuot Celebration at the Contemporary Jewish Museum

Foundation for Jewish Camping, Inc.
JWest Campership

Foundation for Jewish Camping, Inc.
New Specialty Camps Incubator

Hebrew Union College–Jewish Institute of Religion
DeLeT at Hebrew Union College

Institute for Southern Jewish Life, Inc.
Itinerant Jewish Education Program

Israel Education Resource Center Inc.
Development of national Israel education center

Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties
Initiative in Jewish Early Childhood Education

Jewish Early Childhood Education Initiative Inc.
General support of JECEI

Jewish Education Service of North America, Inc.
Israel Education Planning Grant

Jewish Federation of Greater New Orleans
Jewish education in Greater New Orleans

Jewish Federation of Tulsa
Jewish Service Learning Initiative Study by BTW Informing Changes

Partnership for Excellence in Jewish Education Inc.
Day School Leadership Task Force planning

The Board of Trustees of the Leland Stanford Junior University
Planning grant for renewing the doctoral concentration in Jewish education

The Curriculum Initiative, Inc.
2008-2009 General Support

The Jewish Community Center of the North Shore, Inc.
Planning grant for the North Shore Teen Initiative

2008

B'nai B'rith Youth Organization Inc.
Professional Development Institute Cohorts 2 and 3

B'nai B'rith Youth Organization Inc.
San Francisco Bay Area regional activities

Bar Ilan University in Israel
Planning Grant for the Jim Joseph Foundation Fellows Program

Birthright Israel Foundation
Birthright Israel trip support

Birthright Israel Foundation
Jewish Community for the Next Generation

Brandeis University
Birthright Community Studies

Brandeis University
DeLeT MAT program 2009-2010

Brandeis University
Summer Institute for Israel Studies 2009-2010

Bureau of Jewish Education of Greater Los Angeles
A planning grant for Jewish day high school affordability

Contemporary Jewish Museum
Innovation Fund

Facing History and Ourselves National Foundation, Inc.
Model schools project in Jewish day schools in Boston and Los Angeles

Hebrew Union College–Jewish Institute of Religion
DeLeT program 2009-2010

Hebrew Union College–Jewish Institute of Religion, Jewish Theological Seminary of America, and Yeshiva University
Planning Grant for the Educational Initiative

Hillel: The Foundation for Jewish Campus Life
Senior Jewish Educator/Campus Entrepreneurs Initiative

Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties
Bay Area Jewish day school Israel education project

Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties
Educational Planner

Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties
PJ Library

Jewish Community Federation of the Greater East Bay
PJ Library

Jewish Federation of Silicon Valley
PJ Library

Jewish Early Childhood Education Initiative Inc.
2009-2010 General Support

Jewish Federation Council of Greater Los Angeles
High school affordability initiative

Jewish Federation of Tulsa
To continue to engage BTW Informing Change in the research and planning of an initiative in Jewish Service Learning

Mechon Hadar
Support of Yeshivat Hadar

New Teacher Center
JNTP Expansion into Baltimore and Washington, DC

New York University
Graduate student scholarships in Jewish Education

Reboot, Inc.
Five Year Expansion

Repair the World
Platform for Jewish Service Learning

The Central Europe Center for Research and Documentation, Inc.
To strengthen and expand day school teacher professional development program

The Jewish Community Center of the North Shore, Inc.
North Shore Teen Initiative

2009

Bar Ilan University in Israel
Jim Joseph Foundation Fellows Program

Birthright Israel Foundation
Summer 2009 trip support

Brandeis University
JData, Jewish education database website

Brandeis University
Research: Understanding the Birthright Israel Generation: A Longitudinal Study of Jewish Identity and Engagement

Combined Jewish Philanthropies of Greater Boston, Inc., Jewish Community Federation of San Francisco, the Peninsula, Marin and Sonoma Counties, Jewish Federation Council of Greater Los Angeles, Jewish Federation of the North Shore, Inc., and The Jewish Federation of Greater Washington
Education Emergency Grant providing financial assistance to youth attending camp, day schools, early childhood program

Hebrew at the Center, Inc.
Capacity Building

Hebrew Union College–Jewish Institute of Religion, Jewish Theological Seminary of America, and Yeshiva University
Education Initiative to increase the number of high-quality educators

Jewish Film Festival
New Jewish Filmmaking Project
New Media Alumni Initiative

Mechon Hadar
Program Expansion of Yeshivat Hadar

Moishe Foundation
Education, Expansion, Organizational Capacity

Sesame Workshop
Shalom Sesame Educational Initiative

University of Southern California
USC Shoah Foundation Institute for Visual History and Education—International Digital Access Outreach and Research Conference

Members of the Foundation's highly credentialed Board of Directors bring considerable expertise to their governance of the organization. They represent a spectrum of denominational practice and play active roles in many areas of Jewish education. Together, they share a commitment to fulfilling Jim Joseph's philanthropic mission, while ensuring that Foundation activities are conducted with rigor and accountability.

Board of Directors

Alvin T. Levitt
President

Phyllis Cook
Susan Folkman, Ph.D.
Dvora Joseph
Jack Slomovic
Jerome Somers

Staff

Charles "Chip" Edelsberg, Ph.D.
Executive Director

Sandra J. Edwards, Ph.D.
Associate Director

Mary Seabury
Chief Financial Officer

Adene Sacks
Program Director

Dawne Bear-Novicoff
Program Director

Josh Miller
Program Officer

Rachel Schiff
Program Officer/Assessment Specialist

Diane Cronan
HRD Consultant/Community Relations Consultant

Blake Soiu
Information Technology Consultant

Kelly Miller
Executive Assistant

Cynthia Megino
Grants Administrator

Shelley Barnea-Smith
Administrative Assistant (January 2008-August 2009)

Benton Odessa
Administrative Assistant

Marjorie Levy
Administrative Assistant

Jim Joseph Foundation. Planning Retreat with JJF *Madrichim*. Pictured from left to right: Rabbi David Ellenson, Rachel Levin, Arthur Fried, Susan Folkman, Ruth Messinger, Chip Edelsberg, Rabbi Irving "Yitz" Greenberg, Dvora Joseph, Al Levitt, Jack Slomovic, Jerry Somers, Alan Hoffman, Richard Joel, Phyllis Cook, Jeffrey Solomon, Jehuda Reinharz

Jim Joseph Foundation. Board of Directors and staff. Pictured from left to right: Sandy Edwards, Chip Edelsberg, Dvora Joseph, Al Levitt, Jack Slomovic, Susan Folkman, Jerry Somers, and Phyllis Cook.

Page 1: Board of Directors photo by Doug Adesko.

The Foundation would like to thank the grantee organizations that generously provided photographs and information for inclusion in this report. The images herein represent only a small sampling of organizations that have received Foundation funding. We look forward to featuring other grantees in future publications.

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BBYO. A BBYO Passport to Israel teen reflects during a visit to the Kotel. Photo by Ofer Ribak

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Shimon ben Joseph

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