

# Shutaf Inclusion Camp

As they are everywhere, inclusion camp opportunities in Israel are scarce, and even more rare for families who cannot afford the costs of camp. Thanks to the generosity of the Ruth and Estelle Seldowitz Field of Interest Fund, it just got a little easier. One recipient of this fund, Shutaf Inclusion Camp, has been able to add additional students from Beit Shemesh to their inclusion camp this summer. In this warm and welcoming environment, campers with disabilities have been able to participate in traditional camp activities alongside their typically developing siblings and peers.

Inclusion camp experiences are nothing new to the Washington area. This summer alone, 190 children with special needs received a Jewish summer camp experience like that of their peers at our local Jewish Community Centers and at Capital Camps.

For more information on the Shutaf program or for programs for children with special needs in our area, please contact Linda Kraner at [linda.kraner@shalomdc.org](mailto:linda.kraner@shalomdc.org).



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Holidays are always a busy time for the Jewish Food Experience (JFE). For Rosh Hashanah, JFE piloted a series of Apples & Honey Tastings with Whole Foods Market’s Mid-Atlantic Region. At 17 tastings, JFE connected with more than 1,500 people sharing myriad ways which they could deepen their relationship with the Jewish community.

Additionally, JFE’s Community Partnership Grants Program is up and running and has already awarded 11 mini-grants for programs featuring Jewish food. Grant recipients thus far have included local community centers, cultural programs and congregations. JFE is also pleased to support a monthly event at the DCJCC where volunteers prepare dishes for local homeless shelters.

Also this fall, JFE spearheaded its own programming including a volunteer event at Common Good City Farm, a packed Challah Baking Workshop and an Erev Rosh Hashanah dinner, which completely sold out more than a week before the holiday! On the horizon is a series entitled “Behind-the-Scenes with Jewish Foodies” with exclusive opportunities to spend time with chefs, cookbook authors and wine experts in their homes and work kitchens. To kick this off, Chef Paula Shoyer, cookbook author and nationally known expert on Pareve desserts, will be leading a pastry demo and class from her Chevy Chase home on November 23.

Interested in learning more about the Jewish Food Experience? Contact Paul Entis, Director, at 301-230-7261 or [paul.entis@shalomdc.org](mailto:paul.entis@shalomdc.org).

## YOUR STATEMENT

FALL 2014

# Making a Statement

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## Message from the President and Managing Director

*L'Shanah Tovah!* Thank you for entrusting your philanthropic funds with UJEF. Enclosed you will find the statements for your funds with the United Jewish Endowment Fund (UJEF). Please note your annual and quarterly statements reflect contributions and distribution activity as well as investment performance through June 30, 2014. While we do not expect any changes, these statements will not be considered final until we undergo our financial audit. If there is a change, we will mail you a revised final statement.

It has been an exciting year of growth for UJEF. Some highlights include:

- A focus on multigenerational philanthropy: our team of professionals trained in family philanthropic succession planning worked with multiple generations of a local family in deliberate discussions about engaging the next generation in philanthropic decision making.
- The Grants Committee made distributions of more than \$1.5 million, including \$624,000 for exciting new programs in Israel in partnership with Israeli philanthropists.
- Established a Professional Advisors Alliance: a network/study group for emerging Jewish estate planning attorneys, accountants, financial planners, insurance professionals and philanthropic advisors to better support them in building their practices. Please let us know if you know a professional who may be appropriate for this group.
- A new website for Create a Jewish Legacy (CJL), hosted at [www.jewishlegacygw.org](http://www.jewishlegacygw.org): the site advises donors how to begin thinking about their legacy, and also offers technical support to CJL partner organizations and other professionals.

Over the past year, UJEF assets under management grew from nearly \$170 million to \$186 million. During the fiscal year, UJEF received approximately \$16 million in contributions. Grants to charities totaled more than \$17 million.

We would like to introduce to you Elan Burman, Director of Planned Giving for UJEF. Elan comes to us from Cape Town, South Africa where he served as the Deputy Executive Director of the United Jewish Campaign. In his new role, he will focus on cultivating meaningful relationships that enhance the Washington Jewish community and the lives of its stakeholders. If you would be willing to share the story of your philanthropy to inspire others to think about their legacies and create a fund with UJEF, contact him at [elan.burman@shalomdc.org](mailto:elan.burman@shalomdc.org).

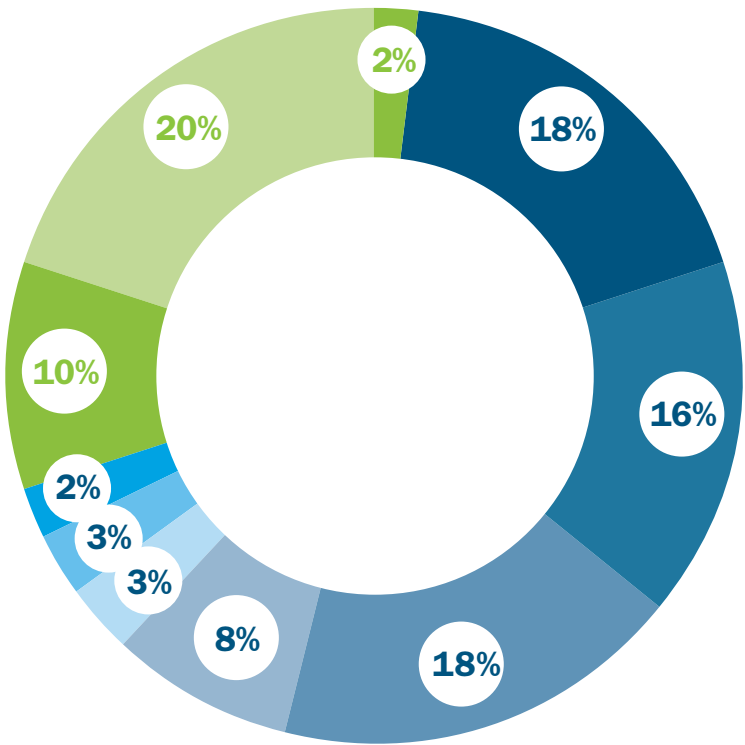
As always, we hope that you will be in touch with any questions that you may have. You may contact either one of us directly using the contact information below.

Best Regards,  
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Portfolio Allocation June 2014



- Equity 68%**
- 18% Domestic Stocks
  - 16% International Stocks
  - 18% Long/Short and Event Driven
  - 8% Private Equity
  - 3% Private Real Estate
  - 3% Public Natural Resources
  - 2% Private Natural Resources

- Fixed Income 32%**
- 10% Credit Oriented Hedge
  - 20% Fixed Income and Cash
  - 2% Israel Bonds

Purpose of Investments in the Portfolio for June 2014



INVESTMENT PERFORMANCE THROUGH JUNE 2014						
	One Month	Calendar YTD	One Year	Three Years	Five Years	Ten Years
Entire Fund Total	2.44%	4.61%	14.40%	7.55%	10.38%	6.41%
Policy Index	1.15%	4.77%	15.06%	7.38%	10.08%	5.94%
S&P 500	2.07%	7.14%	24.62%	16.59%	18.84%	7.78%

Please note that these numbers include estimates and are subject to revision. Performance reports are based on the most current data available.

Engaging the Next Generation

**Top Tips for Charitable Advisors on Engaging the Next Generation**  
**Charitable planning often takes into account the role that next generation family members will play in serving as trustees and successor trustees of foundations, donor advised funds and other vehicles. With four generations above the age of 21 in American society today, “the kids” are often adults by the time they become involved in philanthropic activities. What follows are tips for engaging adult children in charitable endeavors.**

**Foster a transition from a parent-child dynamic to one of peers.**  
While we might imagine our children as they were at age 5, 12 or 16, often they are more like 25, 35 or sometimes 45 when they become trustees of charitable vehicles. Adult children bring academic degrees, work experiences as well as their own values to bear on the responsibility of making philanthropic decisions. Consider how you might transition the relationship from parents and children to one of peers making philanthropic decisions where every voice is heard.

**The “next generation” is two different generations—Generations X and Y—with distinct personalities: use different approaches for each generation.**  
Members of Generation X were born between 1964-1980 and often bring a strong sense of independence, resourcefulness as well as skepticism to institutions. Learn how you can embrace the creativity as well as the curiosity of Gen X family members even if it means creating new funding vehicles for them to explore their own philanthropic identities. Gen Yer’s have birthdates between 1981-2000 and were reared on the Internet and its many applications. They are used to using technology to access information and to engage in civic activities. Consider offering them ways to tap into information about the family’s giving and grantees.

**Uncover the values that lie beneath the next generation’s choices.**  
Encourage family members to take time to discover what motivates someone else’s choices—members of different generations may find they have a lot in common with each other. A Gen Yer’s wish to support microloans in rural Kenya and her grandpa’s funding of scholarships in Chicago might both be choices rooted in creating opportunities for low-income people.

**Learning is a two-way street.**  
As advisors and families prepare the next generation for their philanthropic responsibilities, there is a tendency to assume learning has to be unilateral, with one generation educating another. While the next generation might not have the longevity of experience possessed by the older generations, they have fresh skills and perspectives to bring to the table. Once asked to share what they know, next generation family members tend to be more receptive learners.

**Transparency matters.**  
Access to information is a given these days. While advisors and parents often worry about “the kids” learning about family money or philanthropic resources at too young an age, current technology allows next generation family members to Google more than we realize. Rather than worrying about what next generation family members may know, discuss what is already in the open and provide the next generation with tools and skills for handling their philanthropic legacy.



**Show rather than tell.**  
Experiential learning is preferable to didactic learning with the next generation. Encourage tactile experiences like site visits, grantee presentations, philanthropy conferences and educational journeys to learn about funding areas.

**Drawing people in is easy. Sustaining their engagement requires change.**  
Next generation family members can only stay at “the kids’ table”—or the junior board or the associate position level—for so long. Material involvement is eventually what all adults seek. Discuss the trajectory of what their participation will look like so that along with what is expected of them, they know what they can expect in return.

**United Jewish Endowment Fund professionals are trained to help your family engage in these conversations and answer questions about involving multiple generations in philanthropic decision making. Please contact us at endowment@shalomdc.org or 301-348-7357 to schedule a meeting.**

*Originally written by Sharna Goldseker of 21/64 Inc. for Strategic Philanthropy, Ltd.*