



**SAMIS**  
FOUNDATION

STRATEGIC PLAN  
FOR PHILANTHROPY  
2021 – 2025



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## Executive Summary

Since 1994, the Samis Foundation has honored the legacy of Sephardic Jewish shoemaker and Seattle-based immigrant Samuel Israel, embodied by his sense of responsibility as “his brother’s keeper.” In accordance with Sam’s wishes, the Foundation continues his inspiring work by strategically re-investing the profits reaped from his real estate investments to help build and strengthen Jewish education, nurture a life-long commitment to the Jewish people, support the State of Israel, and provide aid at urgent times of global need.

Managing significantly increased Foundation assets, the Samis Trustees sought a roadmap to guide their decisions on how to best leverage the Foundation’s grantmaking activities within an environment paradoxically characterized by a dramatically growing Jewish population - with a 70 percent increase in Seattle between 2001 and 2014 - but declining enrollment in Jewish day schools. With a new leadership team in place and total grants reaching \$100 million since inception, the time was right for the Samis Foundation to reflect upon its path forward.

In 2019, the Samis Foundation engaged TCC Group, a national mission-driven consulting firm deeply invested in helping funders and nonprofits find ways to realize the change they seek in the world, to help it chart a course to strengthen its impact and align its philanthropic strategies with its vision. In light of Seattle’s changing Jewish community, national trends and innovations in Jewish education, and grantmaking best practices, the Foundation convened a committee of Trustees and staff, with the goal of developing a robust strategic plan to guide its future work.

## Plan Summary: Vision, Mission & Strategic Impact Goals

The Foundation’s nearly year-long strategic planning process, informed by a robust data gathering effort from community members and the larger Jewish philanthropic field, yielded enthusiastic adoption of a new five-year plan. The plan includes an updated Samis Foundation mission, vision, four strategic impact goals, an organizational goal and an associated set of strategic objectives and strategies through which each goal will be pursued; a set of aligned success outcomes and indicators will enable the Foundation to track progress and hold itself accountable. With a clear appreciation of where it’s been, where it is going, what it wants to achieve, and how this may best be accomplished in today’s environment, the Foundation will deepen and expand its work, charting the path to an impactful future that will remain true to the values and beliefs of its founder, Samuel Israel.

## VISION

The Samis Foundation envisions a world where the preservation and continuity of Judaism and the State of Israel are secured, a vibrant, healthy Washington State Jewish community flourishes, and the educated Jew is thriving

## MISSION

The Samis Foundation supports access for Jewish youth in Washington State to high-quality intensive and immersive Jewish educational experiences and fulfills Samuel Israel's philanthropic goals of supporting the State of Israel and worldwide disaster relief

## STRATEGIC IMPACT GOALS



### GOAL 1 JEWISH DAY SCHOOL EDUCATION

Promote the sustainability, vitality, and growth of Seattle Jewish day school education



### GOAL 2 EXPERIENTIAL JEWISH EDUCATION

Increase accessibility and participation in high-quality experiential Jewish education for Jewish youth in Washington State



### GOAL 3 PERIPHERIES OF ISRAELI SOCIETY

Improve lives for targeted populations on the peripheries of Israeli society



### GOAL 4 ISRAELI WILDLIFE & ARCHAEOLOGY

Preserve and develop Israel's wildlife and archaeological riches and support opportunities to make these resources available to the general public



## Introduction and Background

The Samis Foundation started with a mission to support Jewish education in Washington State and initiatives in Israel. Since its inception, it has fulfilled this goal by giving more than \$100 million in grants in support of over 150 different programs, organizations, and initiatives.

During his lifetime, Samuel Israel believed in giving back. Born in 1899 in the Sephardic community of Rhodes, then part of the Ottoman Empire, he and his family immigrated to Seattle in 1919. Sam apprenticed as a shoemaker prior to emigrating to the US and, shortly after arriving, founded a series of successful shoe repair businesses in downtown Seattle, eventually landing a contract to repair boots for the United States Army. Sam invested his earnings in real estate amassing a significant portfolio of properties and assets currently valued at approximately \$180 million.

Before his death in 1994, Sam established the Samis Foundation and appointed 16 lifetime trustees. Many of the original lifetime trustees continue to serve on the board, and with their successors and professional staff, oversee and manage the Foundation's assets and philanthropic giving today. The Foundation continues his legacy through its support of formal and experiential Jewish education locally and support for initiatives in Israel. Samis collaborates with grantees and partners to ensure it is effective in its philanthropy and leverages the work of national organizations committed to our priority program areas. In 2020, the Foundation reached the milestone of \$100 million dollars in total philanthropic giving, with annual grantmaking of nearly \$8 million.

The Foundation's philanthropy in Washington State includes support for Jewish day schools, overnight camps, teen Israel experiences, and youth enrichment and engagement programs. In Israel, the Foundation supports five program areas including archaeology, college scholarships, immigration, widows and orphans, and wildlife preservation. In addition, the Foundation provides disaster relief when crises or natural disasters hit communities, Jewish and non-Jewish, across the globe.

Intensive, immersive Jewish education is the centerpiece of the Samis Foundation's philanthropy in Washington State. A day school education provides children with a solid foundation for their Judaism, giving them crucial knowledge about their culture and religion. The Foundation invests heavily to help ensure Jewish day school is affordable for all children and families by providing annual operations grants to cover the scholarship needs for day schools in the Seattle area. Samis further invests in the instructional and institutional quality of the day schools supporting professional development for faculty, board capacity building, Judaic and Israel curriculum, technology initiatives and special needs.

Samis grantmaking in the field of experiential Jewish education includes annual support for general operations, programmatic grants, and needs-based scholarships, as well as funding for capital projects for overnight Jewish summer camps. In recent years, the Foundation launched pilot programs to expand its reach in support of teen Israel experience programs and youth enrichment and engagement programs. Youth who engage in these types of intensive, immersive Jewish experiences strengthen their Jewish identity, deepen their understanding of Jewish traditions, create lifelong Jewish friendships, and develop strong connections with the State of Israel.

Samuel Israel was committed to a successful and vibrant State of Israel for the Jewish people. Today, Samis continues to carry out this vision. The Foundation's grantmaking assists those on the socio-economic periphery to become independent and contributing citizens through immigrant absorption programs, needs-based scholarships for students to access higher education and technical training, and support for "widows & orphans, because they have lost their providers" (Sam's words), as well as promoting the conservation and enjoyment of Israel's rich wildlife resources, and archaeology.

While proud of the work accomplished since the Foundation's inception almost 25 years ago, Samis' board of trustees and staff appreciate the need to respond to the evolving Jewish community in Washington State and stay abreast of developments in Israel. In this spirit, led by new executive leadership and staff, the Foundation's board of trustees engaged in a comprehensive strategic planning process over the course of 2020 to explore the pressing needs and opportunities in Jewish education locally and priority areas in Israel. The Foundation updated its mission and vision while developing a thoughtful and bold strategic plan to inform its work over the next five years.

The strategic plan for philanthropy outlines the Foundation's commitment to the sustainability and vitality of Seattle Jewish day school education, increasing accessibility and participation in high quality experiential Jewish education for Jewish youth in Washington State, improving the lives of targeted populations on the peripheries of Israeli society, and preserving and developing Israel's wildlife and archaeological riches. This plan enables the Foundation to move forward with confidence and fortitude. The trustees and staff are excited to support the growth and vitality of Jewish education in Seattle and the strengthening of Israeli society through the Samis Foundation's continued philanthropy.



## Strategic Plan Overview

At the outset, the Foundation’s guiding questions for strategic planning included the following:

- What is the societal change to which Samis is contributing? Who else shares this vision?
- What is the unique role Samis plays in contributing to the realization of this larger vision—both in Washington State and Israel - and how might this role shift?
- Where should Samis focus its philanthropic work over the next five years to maximize its desired impact? How do these decisions involve/consider partnerships with others?
- Where does Samis need to build its own capacity and acquire resources? On which current assets should it build to maximize its effectiveness?
- Should Samis invest broadly in experiential/informal education to reach more children, or more deeply in day schools to strengthen the schools, or a combination of both?
- How much influence should Samis exert on its day school grantees to ensure viability and vibrancy? What would the Foundation need to do to bring this about?
- Should Samis be supporting “enablers”, organizations and programs which work with young adults and families, to enhance the families’ commitment for school-age children to participate in immersive and intensive Jewish education?
- How much latitude should Samis take in its interpretation and evolution of the original five giving areas that guide its Israel grantmaking?

To facilitate and support this journey, Samis engaged TCC Group, a mission-driven consulting firm with extensive experience in philanthropic strategy and funder collaboration, to design, guide and collaboratively facilitate the 2020 strategic planning work. TCC Group’s knowledge not only of the philanthropic and nonprofit fields broadly speaking, but also experience working with community foundations, Jewish foundations, and within the Jewish education and engagement, day school, and Israeli sectors, made them a natural partner and effective resource. TCC brought strong data analysis practices, a perspective that includes a deeply collaborative approach to creating strategy and experience guiding foundations in exploring the viability of various philanthropic strategies that could increase impact and help Samis realize its goal of contributing to a vibrant and committed Jewish community.

The highly participatory and iterative planning process was led by a Strategic Planning Steering Committee, inclusive of members of Samis’ board and staff. The work began by engaging the Foundation’s board and

staff in conversations about past accomplishments and future aspirations, strengths, and growth opportunities during a December 2019 retreat. In this initial phase of work, TCC Group conducted eight preliminary interviews with board and staff members, a board survey, three grantee interviews, and a Day School Heads of School focus group. At the same time, TCC reviewed an array of institutional materials (governance documents, strategy documents, grantmaking history and strategy, public reports on experiential education, day schools, external communications, etc.) to acquire solid understanding of the Foundation’s past work and leadership conversations.

Throughout this process, Samis intentionally gathered information, input, and feedback from diverse stakeholders to inform the construction of an authentic plan—ensuring that the Samis Foundation remains responsive to the changing demographics and trends in the Jewish community in Washington State and Israel. TCC Group immersed itself in the greater Seattle environment to appreciate the past contributions of, and future engagement opportunities for, the Foundation. This included interviews and focus groups to understand how the Foundation’s contributions have been perceived by others. Most importantly, we also investigated what is happening in the region, how needs are evolving, and which of the areas prioritized in the future might be those most appropriate for the Samis Foundation to address.

We specifically sought to engage people of diverse identities and backgrounds, across different sectors and geographies and with varying types and degrees of connection to us and our work. Data collection during this phase was extensive and included: an organizational assessment using the Foundation Core Capacity Assessment Tool (FCCAT); eight stakeholder interviews with funders, partners, thought leaders in the field, and others; a board focus group; and seven focus groups (grantees in Israel, youth enrichment and engagement grantees, day school lay leaders, day school parents, young adults, Seattle area philanthropists, and Seattle Rabbis). Stakeholders shared their insights about current and anticipated needs and opportunities in the region, while also providing feedback on the Foundation, the role it has played in strengthening the community and opportunities where we can do better.

Throughout the data collection phase, TCC collaborated closely with the Samis Strategic Planning Committee to analyze and make meaning of the data to inform subsequent data collection. TCC facilitated two separate meetings with Samis’ Strategic Planning Committee to construct the beginnings of a “Theory of Change” – a flow chart that connected the Foundation’s vision to its philanthropic strategies and to review some of the emergent findings and themes, identify remaining data to gather, and to update and align hypotheses and potential directions for the Foundation’s future.

The COVID-19 pandemic occurred in the midst of our Strategic Planning Process. Samis and TCC Group amended timelines and made the conscious decision to hold all meetings virtually. We were fortunate in that much of our data collection occurred prior to the emergence of the pandemic, allowing focus group attendees to meet in person without crisis-related stress. The implications of the COVID-19 crisis remained front and center on everyone’s mind and helped preserve the integrity of the strategic planning process; we continued to make adjustments and accommodations to account for a rapidly changing environment. As we waited over the summer months for the dangers associated with the pandemic to subside, TCC Group facilitated data sharing sessions to provide Samis’ full board of trustees the opportunity to dive more deeply



into the findings from the data collection process. These sessions further familiarized attendees with information gathered in three specific content areas: 1) environmental scan/demand for Jewish education/millennials; 2) experiential education; and 3) day schools.

An important component of our work was to examine Samis' role in supporting the vitality, sustainability, and growth of the day school ecosystem in Seattle. Samis staff in collaboration with TCC developed a Day School Deep Dive Report, which included the following activities:

- Review of the Foundation's grant history to Seattle day schools including funding levels, funding approaches, and special initiatives
- Interviews with representatives from Prizmah: Center for Jewish Day Schools, Consortium of Jewish Day Schools, UJA of Greater Toronto and a wide variety of leaders in the field of Jewish day school education to determine best practices in day school enrollment and affordability, recruitment and retention of outstanding faculty, collaboration and consolidation, small school and small city practices, and funding approaches
- Consideration of ways the Samis Foundation might play a larger role in promoting best practices in the day schools it supports, especially regarding enrollment and sustainability
- Convening several focus groups of Seattle stakeholders to discuss the local day school landscape and the demand for Jewish day school education

TCC synthesized the data collected and developed a Strategic Pathways Report which was reviewed by the Steering Committee at a Decision-Making Retreat. The Strategic Pathways Report provided the Strategic Planning Steering Committee with the information necessary to make informed decisions about Samis' future direction. Contents of the report were shared and discussed at a two-part, six-hour planning retreat, facilitated by TCC Group. Results from this meeting include an updated vision and mission statement, and the identification of Samis' four strategic impact goal areas to move the organization forward over the next five years.

The Samis Board met with the Steering Committee to review and approve the recommended mission, vision, and strategic impact goals. Once approved, board members and staff formed working groups to develop strategic objectives, identify outcomes and articulate specific strategies to support the strategic impact goals. In our last stage of work, we worked collaboratively and diligently to map out an organizational roadmap and implementation plan to direct the Foundation's work moving forward. The outcome is a robust strategic plan, with a clear roadmap for accomplishing strategic priorities and making philanthropy and grantmaking decisions moving forward, plus measurable benchmarks for monitoring progress along the way.

## Strategic Impact Goals

The Foundation's nearly year-long strategic planning process yielded enthusiastic adoption of an updated Samis Foundation mission, vision, four strategic impact goals, an organizational goal and an associated set of strategic objectives and strategies through which each goal will be pursued. The plan includes a set of aligned success outcomes and indicators to track our progress and hold ourselves accountable to the plan.

The Samis Foundation's work is powered by our mission and vision. These core tenets will guide how we seek to build authentic relationships with grantees, funding partners, thought leaders, and the broader Jewish community. Developed and adopted through collaborative dialogue among our board of trustees and staff, the following statements mutually reinforce and support each other. Note that the Foundation's mission statement targets Jewish youth, specifically from birth through college, in Washington State.

### Strategic Impact Goals

#### Goal 1

Promote the sustainability, vitality, and growth of Seattle Jewish day school education

#### Goal 2

Increase accessibility and participation in high-quality experiential Jewish education for Jewish youth in Washington State

#### Goal 3

Improve lives for targeted populations on the peripheries of Israeli society

#### Goal 4

Preserve and develop Israel's wildlife and archaeological riches and support opportunities to make these resources available to the general public



## Strategic Impact Goal

1

## Promote the sustainability, vitality, and growth of Seattle Jewish day school education

### Rationale

At its inception, Samis trustees identified Jewish day school education in Washington State as the top priority of the Samis Foundation. Over the past twenty-five years, Samis has impacted thousands of Jewish lives through its day school philanthropy providing over \$80 million in grants to local day schools. Today, day school philanthropy remains the largest funding area of the Foundation and Samis is dedicated to ensuring that local day schools are bastions of academic excellence, providing the highest quality Jewish and secular education.

Research continues to support Jewish day school education as integral for preserving and incubating Jewish life. Day schools are the most intensive and immersive educational experience given the sheer number of hours students spend in school, and likewise, the deepest and most worthwhile investment in Jewish continuity. A day school education provides Jewish children a foundation for their Judaism, giving them crucial knowledge about their culture and religion. Students learn Jewish values, interact with other Jewish children, strengthen their Jewish identity and connections to Israel, all while receiving an excellent secular education.

Over the course of the last few decades the national and local landscape of day school education has shifted dramatically. The greater Seattle area, much like other communities throughout the country, has suffered a decline in day school vitality, sustainability, and affordability. Local day school enrollment reached a peak in 2003, but over the past eight years in particular, enrollment declined by 40%.

The changing landscape of the Seattle Jewish community coupled with financial and educational trends within the Puget Sound area, present significant challenges for day school education. As one of the “most educated cities” in the country, Seattle boasts an incredibly competitive marketplace for private and public education. One in five students attends an independent private school and many independent schools have a high percentage of Jewish students. Public schools have the critical mass, government mandates, and financial resources to meet diverse students’ needs and provide an exceptional education. In addition, the

increasingly prohibitive cost of living in Seattle and shifting Jewish generational attitudes away from organized Jewish life and day school education, have further compounded the challenges faced by local Jewish day schools.

As the major funder of Seattle day schools, providing more than one third of day school operating budgets, Samis cannot stand idly by and witness further enrollment declines at local day schools. Based on a multi-layered and thorough research initiative, including interviews with over two dozen heads of day schools, educators, thought leaders and philanthropists, and an exploration of dozens of case studies and successful interventions in other North American communities, Samis will work to strengthen the local day school ecosystem. Informed by research, data, and analysis, Samis will engage key leadership, stakeholders, and partners to lead an effort to revive Jewish day school education in the greater Seattle area. While Seattle's Jewish day schools currently serve a relatively small and narrow Jewish youth population, Samis' continued investment and strategic plan to support day school sustainability, vitality and growth will pay dividends for future day school students and the entire local Jewish community.

## Objectives:

Encourage collaborations, co-locations, strategic alliances, and reorganizations to increase sustainability and vitality

### Key Success Outcomes:

- Samis, heads of school and community lay leaders evaluate potential collaborations for Seattle-based schools
- Enrollment is robust as a result of school strategic alliances and structural reorganization
- Samis and schools adhere to a new Day School Funding Policy

Increase day school affordability

### Key Success Outcomes:

- Implementation of a 'middle income' affordability initiative for tuition assistance
- System-wide reduction in cost to educate per student
- School expenses decrease to achieve an average cost per student consistent with similar communities

Increase day school excellence

Key Success Outcome:

- New state of the art programs are established to enhance academic excellence and encourage retention of families in the day school system

Develop day school partnership strategy across greater Seattle community with key stakeholders

Key Success Outcomes:

- The Foundation, schools and community co-ordinate to effectively message the value of day school education
- Strategic Plan for Philanthropy is shared and understood by day school leadership and broader community
- Strategy is developed to target early childhood programs for recruitment and address middle school leakage to increase the funnel for day schools
- Partnerships are established to deepen community resources in support of a healthy day school ecosystem



Strategic Impact Goal

2

**Increase accessibility and participation in high-quality experiential Jewish education for Jewish youth in Washington State**

### Rationale

Experiential Jewish education features a diverse array of intensive and immersive educational options including camps, Israel experiences, youth groups, and other youth enrichment and engagement experiences. The Samis Foundation has invested nearly \$8.5 million since inception in support of experiential Jewish education. Support for the three Washington State Jewish overnight camps and need-based camp scholarship programs represent the bulk of grantmaking in this area at nearly \$6 million. Although Samis has supported other experiential education programs since its inception, in recent years, Samis significantly augmented its experiential education philanthropy by launching grant pilot programs in teen Israel experiences and youth enrichment and engagement programs.

Jewish experiences in childhood are especially influential as youth move into adulthood, develop Jewish identity and make important decisions such as choosing to raise Jewish children. Impactful formative Jewish education increases the likelihood of college students to join a Jewish group like Hillel or Chabad, go on a Birthright Israel trip, or take Jewish or Israel-related classes. Particularly for families without the capacity to teach Judaism at home, powerful educational experiences are needed for their children. The vibrant and creative field of experiential Jewish education provides families with the opportunity to select the program that best fits the unique needs and interests of their children.

Jewish summer camps are considered a deeply effective tool for building Jewish identity and continuity, due to their immersive nature. For many youth, camp is their primary Jewish educational experience outside of the home. Camp noticeably increases the likelihood of an adult's Jewish engagement. As adults, campers are 21% more likely to feel being Jewish is important and 55% more likely to feel emotionally attached to Israel. The impact of camp is arguably greatest for counselors, who are groomed to be role models and whose engagement in Jewish life continues with Hillel and other Jewish activities as they move through college. Particularly of note from a philanthropic perspective, national research conducted by the

Foundation for Jewish Camp highlights that camps are the only segment of Jewish education consistently demonstrating growth in enrollment.

Teen Israel experience programs are also proven to have consistent, enduring, and positive contributions on adult Jewish engagement for teens and young adults. Teen Israel travel appears to elevate religious activity, attachment to Israel, and Jewish community involvement as well as the value placed by participants on having Jewish friends, Jewish dating, and Jewish in-marriage. Research in the field confirms that meaningful travel to Israel exerts a more powerful impact on adult Jewish identity than camps or youth groups on almost all measures. The impact of Israel experiences even rivals that of day school attendance for 1-6 years or religious school for 7-12 years. Alumni of Israel experience programs consistently display substantially higher levels of Jewish engagement than young adults with similar patterns of parental in-marriage, denominational upbringing, and Jewish schooling.

Organized youth groups have a strong history across the United States, Israel, and other countries. Participants engaging in national youth groups rank highly and positively on attitudes related to Judaism, Jewish identity, Jewish practice, social-emotional development, communal engagement, and volunteering. Through youth enrichment and engagement programs, teens form new friendships, learn valuable leadership skills, strengthen their connection to the State of Israel and build community. Emerging programs include Jewish teen philanthropy programs in which teens are introduced to collective grantmaking and the notion of lifelong giving through the lens of Jewish values. As youth programmatic offerings expand and adapt to address the passions of new generations, the Foundation is eager to support and help these programs flourish in our local community.

The basis and framework of Jewish identity begins in early childhood and is crystalized in youth and young adulthood. During these formative years it is crucial for youth to gain exposure to Jewish life, belief, and tradition, and build meaningful relationships within the Jewish community. Through the strategic planning process, the Foundation will continue to expand its philanthropy to increase accessibility and participation in high-quality experiential Jewish education. Samis will focus its efforts on supporting recruitment efforts for experiential education opportunities, program quality enhancements to deepen engagement, increased capacity to expand participation, and the establishment of key partnerships to reach Samis' goals and leverage its impact. With an emphasis placed on relationships, research, and results, Samis looks towards the future intent to make strategic investments within the burgeoning field of experiential Jewish education.

## Objectives:

Expand opportunities for Jewish youth to attend Jewish camp

### Key Success Outcomes:

- More families, particularly those who are unaffiliated, send their kids to Jewish overnight camp
- Partnerships are established to leverage resources in support of select initiatives including the creation of camp endowments, year-round Jewish engagement programs or needs-based scholarships

Identify and expand access to intensive and immersive experiential Jewish youth enrichment programs

### Key Success Outcomes:

- More youth in Washington State are participating in youth enrichment programs
- Local and national partners collaborate to launch and support new programs in Washington State

Increase opportunities for Jewish youth to engage in Israel Experience programs

### Key Success Outcomes:

- More families, particularly those who are unaffiliated, send their kids on teen Israel experience programs
- Local and national partnerships are established to leverage resources and sending more teens to Israel





Strategic Impact Goal

3

**Improve lives for targeted populations on the peripheries of Israeli society**

### Rationale

In the founding documents of the Samis Foundation, Samuel Israel articulated specific areas of philanthropy to express his commitment to ensuring a thriving and successful State of Israel. The original areas included assisting those on the socio-economic periphery to become independent and contributing citizens through immigrant absorption programs, college scholarships, and programs for “widows & orphans, because they have lost their provider” (Sam’s words), as well as promoting the conservation and enjoyment of Israel’s rich wildlife resources, and archaeology. Since inception, the Foundation has given over \$6 million to organizations and causes in Israel which are making a meaningful and tangible impact in supporting targeted populations on the periphery of Israeli society.

As a result of the strategic planning process, the contours of the categories of Samis’ philanthropy in Israel have expanded in breadth to better serve Israelis living on the socio-economic periphery. Updates include changing the category of college scholarships to “educational support” which enables an expansion of grantmaking to include post-high school technical training and capital projects, expanding the “widows and orphans” category to address domestic violence and assistance for children and teens who lack family support, and adding a specific funding category for Israelis experiencing poverty. Support for Israelis experiencing poverty was articulated in Sam’s original documents and is consistent with Samis’ funding approach over the past several years.

The Jewish Agency and the Ministry of Aliyah and Absorption forecast a significant increase in Aliyah, with 250,000 new immigrants expected between 2021 and 2026. Although many of these immigrants will arrive with an academic degree and professional experience it is anticipated that due to the employment crisis resulting from the pandemic, they will face greater difficulty finding appropriate employment than their predecessors. Over the next few years, the Foundation anticipates that its efforts to support immigration will primarily focus on immigrant vocational training or re-training to find appropriate employment.

Samis will continue to fund college scholarships, with an increased emphasis on students in the geographic periphery. Prior to Covid-19, research indicated that support for students in financial need who remained residents in the geographic peripheries of Israel after graduation strengthened the local and national economy. The Foundation will continue to pursue this funding strategy. In addition, Samis will expand the scope of its educational support to include post high-school technical training, as a mechanism to ensure job security for emerging young adults without the desire or capacity to pursue an academic degree.

The impact of the pandemic has been significant in the state of Israel. In the second quarter of 2020, Israel's GDP contracted 7.9%, over the same quarter the previous year. This decrease is in stark contrast to the 4.5% GDP contraction experienced worldwide. Coupled with a 23 % unemployment rate, Israel's poor will require immense social services aid and support to address food security and housing needs. In the short term, the Foundation is particularly interested in funding employment initiatives to support the most vulnerable populations in their quest to return to the job market and young people as they enter the weakest job market in the history of the State.

Domestic violence has risen steeply during the COVID-19 pandemic with the Welfare Ministry reporting a 760% increase in reported incidents over the same period last year. In addition, reported sexual abuse cases of youth more than doubled between June and August 2020 in comparison to 2019. Families facing poverty, unemployment, and food insecurity, paired with widespread anxiety and fear, has impacted the rise in violence and abuse. Youth who are mandated to live in almost year-round school frameworks due to unstable family situations, were forced to return home to toxic and at times volatile environments. Samis intends to support projects that will work with women, children and teens suffering due to increased abuse, in order to alleviate their pain and promote their wellbeing.

Samis' grantmaking in Israel will continue to represent approximately 15% of the Foundation's philanthropy consistent with the Foundation's 2017 Israel Funding Policy. As Samis looks to make new investments, it will select programs with the potential for long-term government funding, encourage connections, collaboration and relationship building amongst Israeli and Seattle-based grantees, and secure like-minded partners to leverage its work. With an emphasis on learning and research, Samis is eager to amplify its grantmaking impact in Israel and help improve the lives of Israelis in need.

## Objectives:

Provide opportunities for economic mobility and support health, housing, nutritional wellbeing, and basic educational needs for Israelis experiencing poverty

### Key Success Outcomes:

- Increased immigrant populations report employment in their field within 8 months of Aliyah
- Teen immigrants have higher matriculation, army and national service rates relative to their peers
- Immigrant groups struggling to assimilate in Israeli society, report greater levels of school integration, higher salary levels and improved employment options

Invest in higher education and technical training for needy Israeli students with an emphasis on the periphery

### Key Success Outcomes:

- Needy Israeli students secure employment within their field or enrollment in a subsequent educational program within one year of graduation
- An increase in capacity, availability of higher education and technical training programs exists on the geographic periphery

Improve the quality of life for widows and orphans, and vulnerable women and children who have lost their providers

### Key Success Outcomes:

- An increased number and quality of support programs exist for widows and widowers
- Improved quality of life for children and teens living in group frameworks or foster care
- Increased awareness and access to support resources for assistance and recovery for victims of domestic violence and sexual abuse in their homes

Support the successful integration of immigrants to encourage their contributions to Israeli society

Key Success Outcomes:

- Research is conducted to identify the areas of greatest need, funding priorities and measurable grant impact outcomes are determined

Amplify Samis' s impact and sustainability of Samis' investments through collaboration

Key Success Outcomes:

- Grantees in Israel and Washington State are aware of each other's scope of work and develop relationships with one another
- Amplified impact of Israeli grantees reported as a result of collaboration with one another
- Partnerships are established to leverage funding and support a greater number and depth of programs



Strategic Impact Goal

4

**Preserve and develop Israel's wildlife and archaeological riches and support opportunities to make these resources available to the general public**

#### Rationale

In the founding documents of the Samis Foundation, Samuel Israel articulated specific areas of Israel philanthropy to include the conservation and enjoyment of Israel's rich wildlife resources and archaeology. Since inception, the Foundation has granted over \$2 million to organizations in Israel to support wildlife preservation and archeology.

Most notably, in the area of wildlife, Samis supported the construction of the Jerusalem Aquarium, the country's first and only aquarium. In the area of archaeology, Samis' philanthropy has focused on supporting the publications of Ehud Netzer z"l archaeological projects and work in Jericho and Herodium.

During the strategic planning process, Sam's original documents were revisited to ensure the Foundation's philanthropy in Israel remained consistent with his wishes. An in-depth review highlighted his interest in making wildlife and archaeology accessible to the public. Sam specifically expressed his desire for the public to have opportunities to explore and view wildlife and archeology, and for the Foundation to provide funding in support of archaeological museums. With Sam's legacy at heart, in the years ahead the Foundation will continue to support and expand opportunities for the public to engage with Israel's wildlife and archaeological riches.

## Objectives:

Advance the protection and conservation of Israel's rich and diverse wildlife, and the opportunity for people to view it

### Key Success Outcomes:

- Increased diversity of people who engage in viewing wildlife
- Improved quality of the experience for the public

Fund preservation of Israel's history through archaeology and provide opportunities for the public to engage with Israel's archaeological riches

### Key Success Outcomes:

- Increased diversity of people who engage with Israel's archaeology
- Improved quality of the public's engagement experience
- Support provided for Israel's archaeological museums

Amplify Samis' impact and sustainability of Samis' investments through collaboration

### Key Success Outcomes:

- Grantees in Israel and Washington State are aware of each other's scope of work and develop relationships with one another
- Amplified impact of Israeli grantees reported as a result of collaboration with one another
- Partnerships are established to leverage funding and support a greater number and depth of programs



Organizational Goal

5

**Build the Samis Foundation’s organizational capacity to successfully achieve its mission and strategic impact goals**

Rationale:

To ensure our ability to advance our four strategic impact goals, the Samis Foundation commits to pursuing its organizational goal and the aligned objectives below to build our own internal capacity for change.

Objectives:

**Communications**

Effectively communicate Samis’ mission, vision, and strategic priorities to increase awareness and foster collaboration

**Key Success Outcomes:**

- Samis board members bring the expertise, experience and skills required to achieve their strategic impact goals
- Board makes data driven decisions to allocate resources and has an ongoing awareness of grantmaking impact and strategic plan progress

## Governance

Develop the Samis Board to successfully support the Foundation's strategic impact goal achievement

### Key Success Outcomes:

- Current and potential grantees are clear on Samis' grantmaking policies and procedures and philanthropic goals, and impact
- Samis' grantmaking policies and procedures are streamlined and efficient across all granting areas

## Grantmaking and Evaluation

Build the Foundation's learning and evaluation capacity by working strategically with grantees to expand and measure impact

### Key Success Outcomes:

- Washington State Jewish community and Israel philanthropic community understand our mission, vision, philanthropic goals, and impact
- Samis brand is clearly known and understood locally, nationally, and in Israel

## Relational Capacity

Enhance Samis' relationship to key local, national, and Israel-based partners

### Key Success Outcomes:

- Samis is a more adaptive and strategic Foundation
- Samis staff have increased knowledge and awareness of fieldwide best practices through embrace of learning culture and professional development

## Operations

Strengthen institutional coherence, alignment, and efficiencies by improving key operational systems and processes

### Key Success Outcomes:

- Samis is viewed as a thought leader in Jewish education for youth in Washington State by other funders, program providers, and broader Jewish community
- National and local funders support Samis causes to leverage our impact



## Conclusion

The Samis Foundation 2021-2025 Strategic Plan for Philanthropy is rooted in Samis' commitment to support Jewish education in Washington State and key program areas in Israel. With renewed vigor and clarity, the Foundation has affirmed its mission and is poised to realize its vision.

Informed by research and data-driven decision making, the strategic plan provides an ambitious roadmap to achieve the Foundation's four strategic impact goals of sustainability and vitality of Seattle Jewish day school education, increasing accessibility and participation in high-quality experiential Jewish education for Jewish youth in Washington State, improving the lives of targeted populations on the peripheries of Israeli society, and preserving and developing Israel's wildlife and archaeological riches.

The strategic plan was crafted with an eye to the future and in acknowledgment of the significant and broad impact Samis has had in the greater Seattle area and Israel over the past 25 years. The Foundation will continue its robust support of intensive, immersive Jewish education through Jewish day schools, Jewish overnight camps, teen Israel experiences, and youth enrichment and engagement programs, with an expanded target demographic of birth through college. In Israel, the Foundation will strategically invest in support of scholarships for higher education and technical training, immigrant absorption, widows and orphans, archaeology, wildlife preservation and a newly articulated category of Israelis experiencing poverty. When crises or natural disasters hit communities around the world, Samis will provide disaster relief funding to Jewish and non-Jewish communities alike.

With the new strategic plan in place, the Foundation is intent to leverage its philanthropy through building key funding partnerships to make an even greater impact in its priority areas. The plan enables the Foundation to continue to learn, adapt and evolve with the dynamic local and global Jewish community. A number of initiatives considered in the plan will require additional research and investigation prior to determining Samis grant eligibility. The plan also provides a framework in which Samis can adapt its philanthropy as real estate revenues are impacted by economic conditions and the COVID-19 pandemic.

Samis looks towards the next five years eager to implement bold philanthropic initiatives with gratitude to all the stakeholders who contributed vital input to crafting and informing the strategic plan. Thank you to local and national leaders and experts hailing from key Jewish organizations and institutions, professionals, and lay leaders, for your generosity of time, invaluable insights, and passion. To the Samis Foundation Board and Strategic Planning Steering Committee members, led by David D. Azose, David Ellenhorn, and Judy Neuman. Thank you to Samis staff and present and future grantees, as your hard work and dedication will help the Foundation actualize the plan and achieve its goals. Samis is proud to enact the new Strategic Plan for Philanthropy and to continue to honor the legacy of Samuel Israel for generations to come.